Policy insight
November 2025

green alliance...

A good food strategy for the UK

Summary

“Effective food strategy is a major opportunity for the government to grow the economy.”

An effective food strategy is a major opportunity for the government to grow the economy, deliver a secure supply of affordable, nutritious food and create an NHS fit for the future. It can create a food system adapted to climate change that restores, rather than harms, nature and supports thriving, healthy communities.

This has been reflected in the goals that the Department for Environment, Food and Rural Affairs (Defra) has set for the strategy: improving public health, fostering economic growth, reducing the sector’s environmental impacts and bolstering food security.[1] Defra’s 2025 publication *Towards a Good Food Cycle* built these goals into outcomes but stopped short of setting out policies to deliver them.[2]

Achieving this is going to require systemic change, rather than the previous approach which has put the burden of action on individuals. Much policy thinking was done in Henry Dimbleby’s 2021 National food strategy, an independent report commissioned by the Conservative government. Defra rightly sees Dimbleby’s report conclusions as central to its food strategy, though it is to be a more iterative process, focused on delivery, rather than a single plan.[3]

In this policy insight, we describe a package of nine policies which we believe should form the core of the food strategy, and deliver the goals set out in a government Good Food Cycle. We update Henry Dimbleby’s original proposals to reflect progress since his report was published, while acknowledging that the 2025 spending review did not explicitly allocate any funding to the food strategy.

We make suggestions for implementation and demonstrate how they support the government's missions, particularly on growth, as well as how to mitigate any unintended consequences of the strategy.

Our recommendations:

Transform the food system

— **Introduce a Good Food Bill** to ensure that affordable, sustainable, nutritious food is a mainstay of the UK food system, strengthen resilience and provide a clear regulatory framework to enable long term investment.

— **Implement mandatory reporting for large food companies** on a range of health and environmental metrics to drive them to increase sales of healthy, sustainable food and allow the government to track progress against targets stipulated in a Good Food Bill.

Invest in high value food industries

— **Publish a horticulture strategy** to increase both supply and demand for UK grown fruit and vegetables, supporting British producers, stimulating growth and increasing food security.

— **Expand the alternative proteins industry**, including through the Industrial Strategy, to boost growth and jobs particularly in regions that need both.

Support farmers and long term food security

— **Create an ambitious Land Use Framework** to increase nature restoration and climate mitigation while ensuring a secure supply of affordable, sustainable, nutritious food. It should also identify where high value sectors could expand, to enhance growth and food security.

- **Provide a roadmap for the evolution of Environment Land Management (ELM) schemes.** This should maximise value for money in spending decisions and explore opportunities to increase the flow of private finance into nature restoration.
- **Improve fairness in the supply chain**, by reforming the Groceries Supply Code of Practice and extending Fair Dealing Obligations to all farming sectors to ensure producers can make a fair profit, without unnecessary risk.

Support the shift to sustainable, nutritious diets

- **Reform government food buying standards and make them mandatory across all public institutions** to ensure that publicly funded food provision is both healthy and sustainable.
- **Consider a high fat, salt and sugar (HFSS) tax,** based on nutrient profiles, with ringfenced revenue, to drive reformulation that accelerates change towards a healthier, more sustainable food system.

Introduction

"The health of a nation is directly tied to the health of its food system."
Wendell Berry

Diet leads to

£268bn

every year in health related costs

How the UK food system works is at the heart of tackling many of today's major challenges: an NHS in crisis, escalating climate change, increasing threats to food security and the rising cost of living.

Climate change and nature degradation are repeatedly found to be the greatest threats to food security. Yet the food system is responsible for 12 per cent of the UK's greenhouse gas emissions, including almost half of its potent methane emissions. [4] The government also estimates that diet leads to £268 billion every year in health related costs.[5] There is a big opportunity to boost the economy, both by reducing these costs and growing high value industries, such as horticulture and alternative proteins.

Increasing accessibility to plant-rich diets should be at the heart of this strategy, as it can serve all four of the Department for Environment, Food and Rural Affairs' (Defra's) priorities for food strategy: growth, food security, public health and reducing environmental impacts.

Too often, a paternalistic framing dominates debates, focusing on what people should have less of, rather than the things people want more of, ie nutritious, affordable, tasty food which is the foundation for better health, a growing economy and thriving communities.

Livestock production is responsible for 65 per cent of agricultural emissions.[6] It is also a very inefficient use of land, taking up 85 per cent of the UK's land used for growing food, but providing just 32 per cent of the calories consumed.[7]

Using some of this land to grow crops directly for human consumption instead would significantly boost food security.[8,9] The Climate Change Committee (CCC) estimates that a 33 per cent reduction in meat consumption, needed to meet climate targets, could also save up to £1 billion in health costs.[10]

The challenge for the government is that many people simply cannot afford a healthy diet. Per calorie, less healthy foods tend to be cheaper than healthier foods like fruit and vegetables. The most deprived fifth of the population would need to spend 45 per cent of

their disposable income on food to afford the government recommended healthy diet and prices are increasing.[11,12] In the short term, policies are urgently needed to redress the balance and make healthier, sustainable eating the most affordable choice.

In the long term, the government will be unable to tackle soaring food prices without addressing the climate change and nature loss that contributes to them.[13]

We outline our priorities for the food system, drawing on the analysis and recommendations in Henry Dimbleby's 2021 National Food Strategy and from other leading thinkers on this issue. We also reflect recent policy developments and current political realities. We begin to explore where our recommendations align with broader government missions and voters' priorities, highlighting where more analysis of potential impacts is required.

Policies for a food strategy

Our policy proposals are assessed below on which of the following benefits they can deliver.

Growth

Environmental

Food security

Public health

Social

Transform the food system

1. Introduce a Good Food Bill

The government should introduce primary legislation to drive long term food system change. To ensure food security in an increasingly uncertain world, investment should be enabled and everyone should have access to affordable, sustainable, nutritious food.

Impact

Solving the UK's food issues is going to require long term change at the system level. The UK public are facing enormous cost of living pressures, with an increasingly volatile climate, causing food prices to rise faster than wages. At the same time, access to nutritious food is unequal. Families on the lowest incomes, many from marginalised communities or living in deprived areas, are the first to feel the squeeze. Even when food is available on the shelves, affordability is a barrier to equity. Some can choose healthy options, while others are forced into cheaper, less nutritious diets, leaving a legacy of diet-related ill health.

A Good Food Bill would be an opportunity to embed health, resilience and affordability targets into the food system and provide long term certainty for private investment. In the areas of climate and the environment, legally binding targets, and the creation of independent advisory and monitoring bodies such as the Climate Change Committee (CCC) and the Office for Environmental Protection, have been critical in catalysing government action. A similar model is urgently needed for food system transformation, to create a sustainable, secure, nutritious and affordable supply of food into the future.

A target is also crucial so efforts to reduce the greenhouse gas emissions from the domestic food system do not simply lead to shifting them abroad. At present, about half the emissions from producing food consumed in the UK are generated abroad.[14] But current UK climate targets do not take these into account, as they only cover territorial emissions (ie those generated in the UK). A target would give some protection to domestic producers by reducing the incentive to increase imports to meet domestic targets, while enabling the government to discourage the import of particularly high emission foods, such as beef linked to deforestation.

A new bill could also support and expand the use of local food strategies, which can play key a role in food system change. Evidence shows that these increase food security, support public health improvements and generate new investment and innovation.[15]

2. Implement mandatory targets and public reporting for food companies

The government should introduce mandatory public reporting and targets for food companies, on both health and sustainability metrics, building on the commitment in its *10 year health plan for England*.[16]

Impact

This framework will provide the openness, and scrutiny needed for a healthy, sustainable, secure food system.

Good data drives good decision making. Greater transparency would increase public and investor scrutiny, enabling more informed decisions and creating incentives for companies to improve their products. It could also support techniques like behavioural nudges to increase uptake of healthy, sustainable options.

Mandatory reporting would prompt better visibility and accountability across supply chains helping the government and suppliers to increase resilience in an increasingly uncertain world.[17]

3. Publish a horticulture strategy

The government should set out in a new strategy how it plans to increase the domestic production and consumption of fruit and vegetables. The Industrial Strategy has already identified agri-tech as a key focus area, and this should be exploited to boost high yield, sustainable fruit and vegetable production.

Impact

Expanding horticulture offers a major opportunity to boost economic growth and improve public health. The sector is currently valued at over £5 billion per year, or nine per cent of the total contribution agriculture makes to the UK economy, while taking up less than one per cent of used agricultural land.[18] There are significant opportunities for this to increase through greater self-sufficiency and by encouraging healthier eating.

It has been estimated that the consumption of fruit and vegetables would have to increase by 86 per cent to meet government healthy diet recommendations. Our analysis has found that expanding production in line with these recommendations would add £2.3 billion to the economy, create 23,520 jobs and raise farm profits by three per cent across the country. This would use less land than is currently given over to subsidised bioenergy crops which is an inefficient use of public money. Increasing fruit and vegetable self-sufficiency by ten per cent would boost the economy by £3.3 billion.[19]

4. Expand the sustainable alternative proteins industry

There is substantial potential to expand the UK's alternative protein industry. Technologies used to produce alternative proteins were included in the Industrial Strategy's engineering biology section. The government should build on this to increase innovation and growth in the sector.

Impact

The alternative proteins industry has great potential to deliver UK growth. Our analysis has found that, with targeted investment and policy support, the industry could be worth up to £6.8 billion annually and create 25,000 jobs by 2035.[20] To date, more private investment has been stimulated per pound of government spending in the plant-based proteins sector than in AI or commercialising university research.[21]

As well as boosting growth, investing in alternative proteins can improve food security and affordability by diversifying consumption. Over the year 2024-25, the price of meat increased faster than plant-based options in every category, apart from bacon, at a major supermarket.[22] With the price of animal-based products rising, efforts to bring more alternative protein products to market will become increasingly important for consumers.

5. Implement an ambitious land use framework

Defra's consultation on the Land Use Framework, that sets out the scale of change needed to meet climate goals and some of the Environment Act 2021 targets, is welcome.[23] This is a chance to align UK food production with changes in consumption to meet health and sustainability goals.

Impact

An ambitious Land Use Framework is vital to cut greenhouse gas emissions from agriculture and restore nature, while minimising trade-offs with food production and enabling growth. By channelling ELM funding towards areas less suited to food production, farmers in these areas could make more income from growing the nature restoration parts of their business, while those on better agricultural land would be supported to continue producing food with fewer environmental impacts.

Using the framework to expand horticulture in suitable areas and restore nature on less productive land could have widespread benefits for communities, including reducing flood risk, improving water quality and increasing food security. This could also help to avoid household food bills rising.[24]

The Land Use Framework can support producers in England to capitalise on changes in demand– such as for more fruit, vegetables and plant-based proteins – by identifying areas of the country where expanded production could be located. This should also consider how the UK can adapt to changes in land use potential caused by climate change.

6. Provide a roadmap for the evolution of ELM

The upcoming Farming Roadmap should provide more clarity around how ELM schemes will evolve, including how the agricultural budget will be divided between the three schemes, and how each one will evolve and draw on public finance.

Alongside the roadmap, Defra should set up a joint Food Sector Commission with the Treasury and the Department for Business and Trade to look at increasing investment in nature restoration along food supply chains.

Impact

Farmers and land managers play a vital role in meeting the climate and nature restoration targets needed for long term food security. But high levels of policy uncertainty make it difficult to attract investment and plan. Providing a guide for how ELM will evolve will help farmers plan and give potential investors the certainty they need. A clear roadmap must allocate sufficient funds to the Landscape Recovery and Higher Tier Countryside Stewardship schemes. These support farming's provision of public

goods, such as nature restoration, carbon sequestration and natural flood management, which will ultimately reduce costs for communities and increase food system security.

7. Improve fairness in the supply chain

Defra should implement policies that support fairer prices for farmers, focusing on areas where profit accumulates in the supply chain to ensure measures do not increase prices for consumers.

Farmers are struggling with low profitability, often receiving less than 1p of the profit made on common food items sold to supermarkets.[25] They also carry most of the risk in the supply chain, for example, if crops fail, while reaping the least financial reward.

While the Groceries Supply Code of Practice (GSCOP) has led to positive changes in retail behaviour since its introduction in 2013, it only covers grocers with a turnover of over £1 billion and their immediate suppliers. Fair Dealing Obligations only protect farmers in their dealings with direct suppliers.

Impact

Expanding the GSCOP would ensure much more of the supply chain is covered by regulation, including smaller retailers and mid-stream companies which accrue the most profits.[26] Alongside this, the government should explore how risk can be shared more fairly along supply chains to help farmers withstand shocks, such as unseasonal weather variability, invest in farm improvements and thrive as businesses, without pushing up food prices.

Support the shift to affordable, sustainable, nutritious diets

8. Reform public procurement

The government should reform public procurement to promote healthier diets and meet its manifesto pledge that over half of all food served in public institutions is either British-sourced or produced to higher environmental standards.[27]

Impact

The vast number of meals served in public institutions means procurement is a powerful lever. Approximately £5 billion per year is spent on this in the UK, with around 60 per cent in education settings.[28] However, government buying standards for food are not mandatory for all public institutions, with school food and local government being notable omissions. It is widely recognised that they need to be updated in relation to nutrition, animal welfare, sustainability and local food procurement.[29,30] With newly expanded free school meals and breakfast clubs, the power of these standards to improve children's health and shape long term eating habits will only grow.

Using public procurement to improve dietary health and sustainability may have some limited short term fiscal impacts, but the long term reduction in health costs, and growth from supporting UK production and improved workforce participation is likely to be significant.

9. A high fat, sugar and salt tax

The government could consider a high fat sugar and salt (HFSS) tax, if wider strategy fails to produce the necessary health and environmental outcomes. Currently, meat consumption is falling in line with the CCC's targets, but poor diets are still an increasing cause of ill health.[31] Therefore, it may be necessary to take further steps to encourage healthy diets.

If a high fat sugar and salt tax becomes necessary, it should be designed to encourage reformulation and its revenue should be reinvested in measures that increase the affordability, availability and appetite for healthy, sustainable food choices.

Impact

There is robust evidence from the success of the Soft Drinks Industry Levy (SDIL) that such taxes lead to rapid and measurable public health benefits. Within a year of its introduction, the SDIL led to a 29 per cent reduction in the average sugar content of drinks subject to the levy and a measurable decrease in sugar consumption. As a result, children consumed around a teaspoon less sugar per day, and adults consumed over two teaspoons less.[32] The approach led to extensive product reformulation, ensuring limited cost impacts and consumers still have access to a similar range of low price products. The reformulation approach also ensured soft drinks sales continued to increase after the levy's introduction – as more people were buying the low sugar soft drinks – avoiding negative impacts on the industry.[33]

Further detail on the assessments is available in appendix one (page 13) and we provide more information about their design and implementation in appendix two (page 15).

Value for money policies

Addressing challenges and issues in the UK's food system is going to require policies which move beyond an onus on individuals, to focus on systemic change which has a much wider positive outcome. While there is strong public support for the government to act, we recognise the tight fiscal context in which it is operating.[34]

We have outlined value for money policies, which will help to stimulate growth, while also significantly improving access across the population to healthy diets, addressing the environmental impacts of food production and supporting farmers.

Our assessment in appendix one summarises potential impacts of each policy and highlights where more analysis may be needed. In appendix two, we provide more information on the policies and how they can be implemented.

Appendix one
Assessment of policy impacts

Policy	Growth	Environment	Food security	Public health	Social
Mandatory reporting for large food businesses	More analysis needed	Positive, as it encourages a shift to plant-rich diets	Potential to improve food security through reductions in food waste and more plant-based food consumption	Likely to lead to increased sales of healthier foods	Could improve health outcomes if companies reformulate products towards healthier alternatives
Land Use Framework	Supports the growth of high value added sectors, eg horticulture, and channels ELM funding to areas that are least profitable from food production	Sets out land use change needed to meet net zero and other environmental targets	Addresses and limits trade-offs between food production and nature restoration	Neutral impact	Boosts farm incomes in marginal areas. Nature restoration has broader social and wellbeing benefits
Farming roadmap	Improves the farming sector's productivity and helps crowd in private finance Ensures higher value for money in ELM	ELM schemes are designed for maximum environmental benefits, and a greater portion of funding could be spent on more ambitious schemes, with the addition of private finance	Provides business with policy certainty to enable future planning and investment	Neutral impact	Greater certainty is good for farm businesses
Reform public procurement	Offers long term cost savings from improvements in public health but may increase government spending in the short term	Positive, if it results in more plant-rich eating	Neutral	More healthy, sustainable food would be served in public institutions	Improves health outcomes, which is positive when combined with an extension of free school meals Producers benefit from additional routes to market
Horticulture strategy	High value added sector with potential for significant growth	Positive, if peat use is ended	Reduces reliance on imports from countries experiencing climate impacts	Includes measures to increase fruit and vegetable consumption	Improves health outcomes, and boosts farm incomes and jobs
Increase fairness in food supply chains	More analysis is needed	Neutral impact	Boosts the financial resilience of farms	Neutral impact	Farmers benefit from fairer deals but it could affect food prices

Policy	Growth	Environment	Food security	Public health	Social
Expand the alternative proteins and horticulture industries	Boosts farm productivity and grows high value added sectors	Investment in technologies could reduce agricultural emissions and the land footprint of food production	Would free up land for other uses, eg by using precision fermentation. Could increase self-sufficiency[35]	Positive, if it includes funding for research into making alternative proteins healthier	Potential to create jobs and boost farm incomes
Good Food Bill	More analysis is needed	An emissions target for the sector, set in legislation, would reduce the import of high carbon foods, reducing overall emissions associated with the food system	Beneficial in the long term, as climate change and nature degradation are the biggest risks to food security An emissions target could help to ensure that UK farmers do not face unfair competition and support greater domestic supply	Benefits to health from legally binding health targets and an updated national reference diet	Improved health, nature, food affordability and climate outcomes
High fat, sugar and salt tax	More analysis is needed. This raises revenue for the government, but a reduction in sales of unhealthy foods could affect growth	Reduces the consumption of processed meat by encouragjng product reformulation or substitution	Neutral impact	Could significantly cut the consumption of unhealthy foods	Positive health outcomes, but could drive up the price of food if not focused on reformulation and if revenues are not reinvested in the affordability of healthy food

Appendix two
More information on approaches and implementation

1. Introduce a Good Food Bill

Approach

As described in Henry Dimbleby's 2021 *National Food Strategy*, the Good Food Bill should do the following:

- introduce a long term statutory target to improve diet-related health and require the government to produce five yearly action plans to achieve this, with interim targets;
- expand the remit of the Food Standards Association (FSA) to include tackling climate change, nature recovery and health promotion; the FSA should be required to provide annual progress reports to parliament on the government's targets; it should also provide advice for the government on the content of its plans, similar to the CCC's role on climate policy;
- update the sustainable reference diet used by all public bodies in food related policy making and procurement, prioritising plant-based sources of protein;
- make government buying standards for food mandatory for all public institutions (see recommendation 4 below);
- require local authorities in England to local develop food strategies.

We recommend an additional element of the Good Food Bill requiring the government to set legally binding targets to reduce the consumption emissions associated with food. At present, UK greenhouse gas emissions targets only cover emissions from domestically produced food, ignoring those associated with imports. This target would ensure domestic commitments are met without offshoring more of the problem overseas. The National Audit Office measures UK consumption emissions.[36]

Implementation

Primary legislation should be introduced in the second or third years of this parliament.

2. Implement mandatory targets and public reporting for food companies, including health and sustainability metrics.

Reporting should be expanded to include all companies with over 250 employees across a range of health and sustainability metrics.

To be effective, this should follow recommendations from the July 2025 mandatory reporting briefing from Eating Better and partner alliances. These metrics should be:

- **Transparent:** published individually on business websites.
- **Reported:** recorded centrally by the government.
- **Comprehensive:** they should not be selective and should cover the full range of measures listed below.
- **Consistent and comparable.**
- **Quality assured:** reviewed by external auditors.
- **Implemented fast:** many of these metrics are already being reported by companies and should not need a long time to implement.
- **Holistic:** they should cover all food sales, including retail, catering and supply chain businesses.

The metrics should be, as follows:

High fat, sugar and salt

- Sales weighted nutrient profiling model (NPM) score and percentage of high fat sugar and salt (HFSS).
- Total volume of sales broken down by nutrient profiling model (NPM), HFSS and non HFSS sales.
- Sales weighted calorie content per 100g.
- Total volume of sales by nutrients of concern: saturated fats, salt and sugars.

Protein

- Protein food sales by volume from livestock-based, seafood-based and plant-based sources for whole foods.
- Ingredient level reporting for composites.

Fruit and vegetables

- Percentage of total volume sales of fruit and vegetables.

Climate

- Emissions reporting across scopes 1, 2 and 3 (ie scope 1: direct emissions from sources a company owns or controls; scope 2: indirect emissions from the purchased energy a company consumes; scope 3: all other indirect supply chain emissions.)
- Progress against science-based targets to reduce emissions across scope 1, 2 and 3 emissions, aligned to limiting global warming since 1990 to 1.5 degrees.
- Scope 3 should be broken into category level emissions.[37]

Metrics should also cover the percentage of food wasted at all stages of production.

Long term, companies should be required to report the impacts of their supply chains on nature, according to the Taskforce on Nature Related Financial Disclosures (TNFD) requirements.

Over time, this policy could evolve to require businesses to set targets relating to each of the criteria they report against. Reporting could follow a similar approach to that used in diversity reporting on boards of FTSE companies, where businesses are required to provide an explanation if they fail to meet the targets.

Implementation

Mandatory reporting should build on the work of the Food Data Transparency Partnership (FDTP) and International Sustainability Standards Board (ISSB).

Defra should explore whether mandatory reporting can be imposed through secondary legislation, to speed up implementation.

Two possible routes could be:

- the Environmental Permitting (England and Wales) Regulations 2016 which could be amended to require food businesses of a certain size to report their food waste data to the Environment Agency;[38]
- provisions in section 23(2) of the Agriculture Act, allowing the secretary of state to introduce regulations requiring a person in the agri-food supply chain to provide information connected with their activities. Section 28 of the act makes provisions for enforcement.[39]

Making the case for expanded mandatory reporting

Many retailers are already reporting on their food sales and introducing health and sustainability targets. But there is a lack of consistency and standardisation in their approach.

Ninety nine per cent of respondents to the government's 2022 food waste consultation, including 65 per cent of large companies which would be affected by mandatory food waste reporting, supported its introduction.[40] In 2025 a coalition of 30 leading retailers publicly called for the government to introduce mandatory reporting.[41]

Food companies are continuing to publicly call for this policy.[42]

3. Publish a horticulture strategy

Approach

The horticulture strategy should:

- address barriers the sector is facing to expansion, such as labour availability and high energy costs, and include policies that would increase consumption;
- work with the Land Use Framework to identify areas of the country where horticultural production could be expanded;
- consider how to increase production whilst reducing emissions from peatlands, which is where 40 per cent of UK grown vegetables are grown, by identifying areas for relocation, including in controlled environments and using wetter farming techniques such as paludiculture.[43]

Implementation

Defra should lead development of a horticultural strategy, in collaboration with Department for Business and Trade, with input from the industry and civil society.

4. Expand sustainable UK production of alternative proteins

Approach

The government should build on the Industrial Strategy to ensure agri-tech innovation enables the UK to capitalise on the shift in demand towards healthier, more sustainable food production. We recommend:

- better resourcing of the Food Standards Agency (FSA) to develop new regulations that bring alternative proteins to market more swiftly; the total cost of this intervention should be relatively low, at around £10 million;
- gearing investment towards innovation infrastructure for alternative proteins, such as clusters that bring producers and suppliers together around new or repurposed manufacturing facilities.
- maintaining the UK's competitive advantage in alternative proteins by retaining the ability to approve new novel food products, despite dynamic alignment with the EU under the forthcoming Sanitary and Phytosanitary (SPS) agreement which covers food safety and animal and plant health standards;
- facilitating closer links between UK farmers and the alternative proteins industry, following the model of the Canadian Protein Industries Supercluster; there could also be support for crop scientists developing UK varieties especially suited to plant-based protein products.

Implementation

These policies can be delivered through the upcoming Industrial Strategy sector roadmaps for agri-tech and precision breeding and through upcoming EU negotiations.

5. Implement an ambitious Land Use Framework

Approach

The framework should:

- retain the scale of change set out in the initial consultation;
- be bolstered by additional evidence of the change needed to meet the Environment Act targets, to end nature declines by 2030 and reduce water pollution from agriculture by 40 per cent by 2038, which were not included in the consultation;
- be connected to the farming budget to support decisions about the budget split between ELM schemes, as well as what the budget is spent on under each scheme.

The framework could help to boost the farming sector's productivity in two ways. It should:

- identify areas of the country where profitable activities such as horticulture (see recommendation 5) could be located;
- provide a clear signal for investors by setting out the environmental outcomes the government wants to deliver in particular locations.

6. Provide a roadmap for the evolution of ELM

Approach

The roadmap for the evolution of the ELM should:

- be informed by how much investment is required to achieve the change proposed in the Land Use Framework, with an indication of how this will be split between public and private money;
- prioritise increasing funding for Higher Tier Countryside Stewardship and Landscape Recovery, with a goal of £1 billion spent through these schemes by 2027.
- explore how to channel funding for practices and technologies, such as precision breeding, that would help sustainably close yield gaps and boost farm productivity, contributing to economic growth and boosting food security.

Alongside its work on the Farming Roadmap, Defra should set up a joint Food Sector Commission with the Treasury and the Department for Business and Trade, to explore how to increase investment in nature in food supply chains. This should involve large food companies, academics, supermarkets and civil society and consider what policy mechanisms could drive genuinely good outcomes for nature from regulation.

7. Improve fairness in the supply chain

Approach

Supply chain fairness measures could include:

- expanding the scope of the Groceries Supply Code of Practice, which covers retailers and their direct suppliers, to include retailers with a turnover of £500 million, exploring whether it should be extended to cover mid-supply chain companies; this would bring the threshold in line with large businesses under competition law, and ensure the measures cover a much wider scope of organisations while still protecting small businesses; the current £1 billion threshold means the code of practice only applies to the 14 biggest grocery retailers in the UK;[44]
- extending Fair Dealing Obligations, which protect farmers in their interactions with their direct suppliers, to cover all farming sectors.

It is important that these measures do not result in higher prices for consumers, as many are already struggling to afford healthy diets. Defra should explore what measures could be introduced to distribute risks more fairly along supply chains, actively intervening to prevent costs being simply passed on to consumers.

Implementation

Fair Dealing Obligations can be implemented through secondary legislation, see the Agriculture Act 2020, section 29.

To change the threshold at which retailers are covered by the code of practice, the government could amend the Groceries (Supply Chain Practices) Market Investigation Order section 4(1) which sets the £1 billion threshold. This was set in secondary legislation issued under a power in the Enterprise Act 2022.

The government should consult on broader changes to the code of practice which would extend it to cover areas of the supply chain not currently covered by regulation. The should investigate how this would work alongside the Fair Dealing Obligations, ensuring they complement rather than duplicate or conflict with each other.[45]

Making the case

- There is strong public support for greater supply chain fairness [46]

8. Reform public procurement

Approach

The government should reform public procurement by:

- redesigning government buying standards for food to reflect the latest evidence of what supports a healthy, sustainable diet; for example, requirements for all main meals to contain two portions of vegetables and mandatory for vegan and vegetarian options in all public sector institution and local government settings; loopholes allowing food which does not meet these standards to 'avoid additional costs' should be closed;
- making government buying standards mandatory across all public sector institutions and local government, and integrating them with the School Food Standards, where the requirement for three portions of meat to be served per week should be removed;
- monitoring and reporting on the standards should be improved as, currently, compliance is only about 50 per cent across the sectors mandated;[47]
- exploring rolling out dynamic procurement models nationally which would open more opportunities for food produced by SMEs and local producers to be purchased and served; pilots have shown that this approach could reduce both costs and carbon emissions.[48]

Implementation

Defra should redesign the government's buying standards, with input from the Department for Health and Social Care on nutrition standards. In doing so, it should draw on the findings of the 2022 food procurement consultation and Will Quince's unpublished 2024 review.[49]

Making the case for public procurement reform

The Food, Farming and Countryside Commission's food conversation revealed strong public support for reforms to public procurement which would strengthen standards in hospitals and schools and increase participation of smaller and local suppliers. [50]

9. High fat, sugar and salt (HFSS) tax

Approach

If needed, a UK HFSS tax could follow a similar approach to the Soft Drinks Industry Levy (SDIL) by targeting product categories with poor nutritional profiles and high levels of environmental impact. For example, this could be through an expanded and mandatory version of the food traffic lights system. However, like SDIL, the tax should be designed to incentivise reformulation rather than simply increasing the cost of unhealthy foods which, for some households, are the only affordable options.[51] It should be:

- levied at the point of import or at the factory gate;
- announced well in advance of implementation, with enough time given for the industry to alter products;
- revenue should be ringfenced to invest in making healthy sustainable foods more affordable and available, particularly to communities which face higher risks of food insecurity and diet-related ill health;
- be delivered alongside R&D support for smaller food producers, enabling them to reformulate effectively.

To do this, we recommend:

- expanding Healthy Start to all families on Universal Credit, increasing eligibility to include children up to five years old, bridging the gap with free school meals, and indexing voucher increases in line with food price inflation;
- introduce auto-enrolment for free school meals;
- fund subsidies and incentives for the supply and promotion of healthy, plant-rich foods.

Implementation

An HFSS tax could be introduced in an upcoming budget, via a finance bill, with policy enacted through secondary legislation, along the lines of the SDIL.

Endnotes

1 ‘Food security’, according to the 1996 World Food Summit definition, is when all people, at all times, have physical and economic access to sufficient safe and nutritious food that meets their dietary needs and food preferences for an active and healthy life.

2 HM Government, 2025, *Towards a good food cycle: a UK government food strategy for England*

3 National Food Strategy, 2021a, ‘Recommendations in full’, p 11

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A good food strategy for the UK

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Green Alliance
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