

Choosing the Right Ingredients

The Future for Food in Scotland
Discussion Paper



The Scottish
Government



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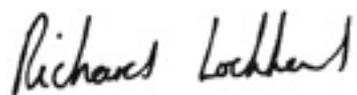
Foreword

For the first time ever, we are giving everyone in Scotland the opportunity to have their say about what is important to Scots and to Scotland – in terms of the food we produce and the food we consume.

The key ingredients are already to hand. We can build on the worldwide reputation of Scotland's quality produce. We can look at how our food contributes to our domestic economy, and serves markets in the UK, Europe and worldwide. We can consider the impacts of our industry on the environment. We can explore how our food industries – and the communities who provide their raw materials – can grow and flourish in sustainable ways. We can reflect on our food choices and our health outcomes.

To help set the direction for Scotland's first national food policy, we need your input. The Government has no pre-cooked recipe for success. What are the ingredients of a successful food policy for your family, your community, your industry or your organisation? This period of national discussion invites you to put your ideas and thoughts on the table. What do you value in terms of Scotland's food industries, food heritage and food culture?

I would encourage everyone in Scotland to be part of this discussion. I look forward to developing Scotland's first National Food Policy in partnership with you all.



RICHARD LOCHHEAD, MSP
Cabinet Secretary for Rural Affairs and the Environment





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Everyone's Business

Food is everyone's business. It's one of the few things that none of us can do without. Any vision of Scotland's future prosperity must include a well-nourished population and profitable food industry. So how do we guarantee a future for Scotland where our food is wholesome, healthy and produced in an environmentally and welfare friendly way?

In the first place, by getting people thinking and talking about it. How is it produced? Is it good for us? Is it 'green' enough? Do we have enough choice? Does our food industry – that means everyone in the food supply chain from the farmers, fish producers and fish catchers through to the supermarkets and consumers – run smoothly? How do they play their part in generating wealth and contributing to the well-being of Scotland's communities?

We, the Scottish Government, have a vision of how this future should be. It's set out below. But how do we get there? That's what we want to discuss with you. So please read on and let us know what you think.



Our vision

Our vision for food in Scotland is that it should make the nation **healthier, wealthier and smarter** with production making communities **stronger** and consumption respecting the local and global **environment**.

- **A healthier Scotland** will result from changing individual behaviour and attitudes about diet and food choices; from improving the nutritional quality, safety and freshness of food on offer in institutions and the catering sector; to supporting Scottish food manufacturers and retailers to take the initiative in driving forward consumer demand for more affordable, healthier food options. Communities across Scotland will enjoy better access to affordable, safe, healthy and fresh seasonal food.
- **A wealthier and fairer Scotland** will result from the sustainable economic growth of the food industry through greater co-operation and collaboration from primary production to final market, ensuring the long-term viability of primary producers, and increasing export markets for Scottish produce.
- **A safer and stronger Scotland** will result from a thriving food industry where local communities will flourish and become better places to live through improved access to amenities and services.
- **A greener Scotland** will result from reducing the environmental impact of food and drink production, processing, manufacturing and consumption by encouraging responsible behaviour throughout the supply chain through reduced emissions, unnecessary use of raw materials, waste, packaging, energy and water use.
- **A smarter Scotland** will result from a highly-skilled and innovative food industry with consumers that are better informed about where their food comes from, how it was grown and the wider health, environmental, social and economic benefits of the choices they make.



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Where we've come from

It's the role of the food industry to provide you with the food you want for your table – round the clock, every day of the year. Government also plays a key role – providing a range of services, including advice and financial support to the food industry.

We need to make sure that there's a steady supply of safe food; that we don't run out of the essentials; and that the most vulnerable people are taken care of, for example with free school meals. In tackling these issues we must also take account of a range of rules and regulations.

In the past, when Governments made policy about food and drink, it tended to be based on what was happening in particular sectors of the industry, rather than in the industry as a whole. Traditionally, the focus was on supporting the market for supplies of primary produce, such as milk, grain and meat. Government still plays a role in regulating and supporting producers and ensuring they use Scotland's natural resources sustainably.

But more recently, we've begun to look at the much broader issues that affect everyone. Issues such as how we square a successful industry and satisfied consumers with a healthy natural environment; how we guarantee the safety and quality of our food; how we keep it wholesome and health-giving yet affordable, and how we position Scottish food to best advantage in the global marketplace, maximising returns back to Scotland.

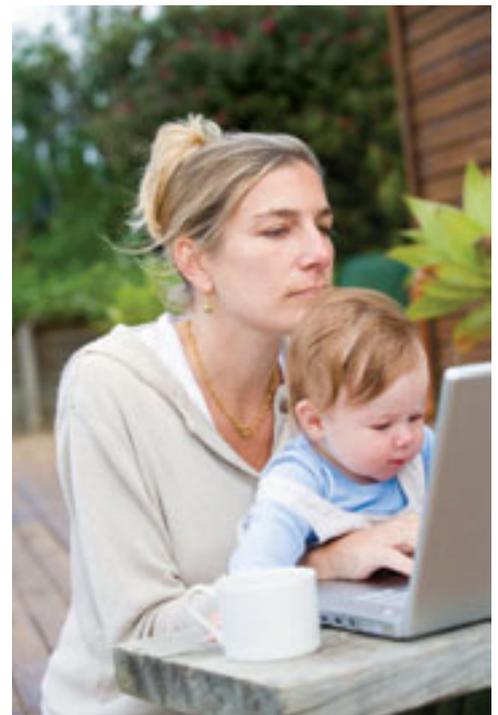
We also have to accept that our health record in Scotland isn't good, and that the amount of food we eat, the kind of food we eat, as well as the way we prepare it, has a significant impact on our health. We all know that good diet can play an important role in helping to prevent Scotland's three big killers – heart disease, stroke and certain cancers. Although we are all taking steps to improve the nation's diet, we still have a long way to go.

Involving everyone

Since every single person in Scotland has a stake in the future of our food and drink industry, it is perhaps inevitable that not everyone's interests have been represented in the debate so far. Which is one of the reasons we're publishing this. We want to encourage everyone to have their say.

Until fairly recently, the same was probably true of the industry itself. But now it has *Scotland Food & Drink*, which was formed last year. This is a body led by food and drink businesses and supported by us, the Government. It is there to help the industry grow by providing leadership and strategic thinking, bringing people together and enabling voices to be heard.

We need to make sure that this new, more joined-up approach is understood and taken on board by everyone, not just in the industry but throughout Government and all the public and voluntary agencies whose interests overlap in any way with food and drink.





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Where we are now

Food and drink generates sales of £7.3bn from processing, including whisky, £1.75bn from agriculture and £0.3bn each from fish-catching and fish-farming. Food and beverages are also the top exporting industry for Scotland, with sales of £3.6bn outside the UK. Sales to the rest of the UK amount to £2.8bn. Fish and shellfish exports make up the largest proportion of total food exports.



One in five people in Scottish manufacturing work in food and drink. Food and drink businesses in Scotland come in all shapes and sizes, though many are interconnected through their respective roles in the supply chain as food processors, wholesalers, retailers or food service providers. Between them they employ over 355,000 people. Although most food and drink firms have fewer than 10 employees, three out of four people in Scotland's food and drink industry work for large or very large businesses.

There's no doubt that food and drink makes an important contribution to Scotland's economy as an employer and as a generator of wealth and profits.



Food Supply Chain Employment (2005 data)

Agriculture and fishing	72,597
Manufacturing	48,000
Wholesaling	20,400
Retailing	101,600
Non-Residential Catering	114,400
Total	356,977

Who we sell to

Different products have different markets. Scottish agriculture supplies a quarter of all the Scottish food and drink industry's raw materials. Together with the fisheries sector, it's a major supplier of raw materials to the food and drink industry UK-wide. Today the UK food and foodservice businesses together are worth a massive £157bn.

More than a quarter of Scotland's manufacturing exports are in food and drink. Our most important overseas markets are France, Spain and Italy, followed by Germany, Ireland and the USA. Some products such as whisky and premium fresh fish are highly successful as exports. Others, such as red meat, where export markets have only recently opened up after the BSE ban, are now starting to pick up again.



The public sector is a market for food in Scotland, worth around £85m. Local authorities alone account for £57m of this. A market this big can be very influential when it comes to encouraging businesses to produce, and consumers to buy, more environmentally-friendly, healthy and local foods.

The Scottish tourism industry is also a huge market for food and drink with overall spending by tourists in the region of £700m each year. It therefore plays a vital role in supporting local suppliers, growing the local economy and helping to sustain communities – and must continue to improve the quality of the food served to our visitors, to encourage them to keep returning to Scotland.



Where we buy our food

In Scotland we buy nearly all of our food from supermarkets or one of Scotland's 5000 independent convenience stores. Speciality shops and farmers' markets are becoming more popular for some sections of the community. Retailers are by far the biggest customers for Scottish produce, and partnerships with them are extremely important to many businesses in the food supply chain. They're becoming much more active in promoting local and Scottish produce, as well as highlighting healthy-eating and environmentally-friendly options.

How we eat

We often choose food according to price. For people on low incomes this tends to mean limited choice and selection of certain types of food. The other deciding factor is convenience. In 1980, we spent an average of 60 minutes a day preparing food in Scotland. In 2007 the average was 18 minutes. Again, this has a direct bearing on the kind of food we choose to purchase, prepare and eat.

Increasingly, we're more aware of the importance of healthy eating and we look for a healthier choice of foods. Sales of fruit, vegetables and fish (including oily fish) are on the increase, farmers are producing leaner meat, and other processors are responding by reducing salt, sugar and saturated fats in their foods.

The nation's health is improving, but not fast enough and there's still a lot of inequality. We eat far too much high fat and sugary food, and drink too many sugary drinks, all of which is helping to make us obese. The quantity of vegetables, potatoes, meat and meat products purchased for consumption outside the home is lower in Scotland compared to households in the rest of the UK.

Our poor diet contributes to high obesity levels and is a cause of major chronic diseases, costing the NHS hundreds of millions of pounds every year. Poor health means a poor quality of life for individuals, lost productivity for employers and distress for families caring for chronically sick relatives. Most importantly, a poor diet can shorten life expectancy.

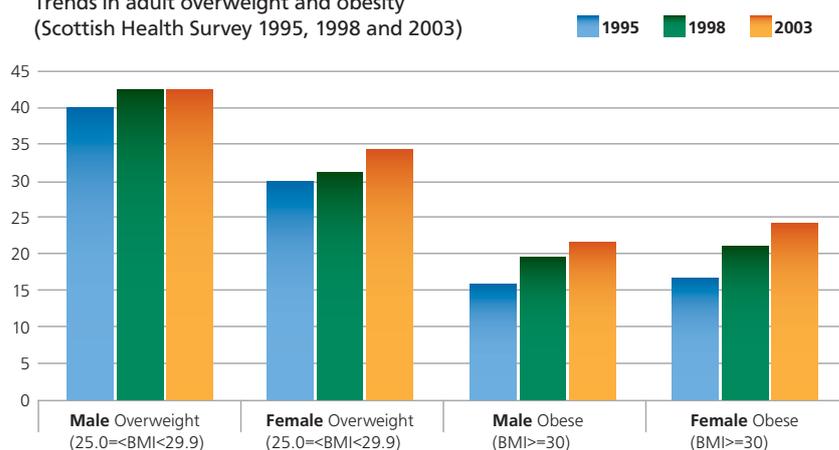
Today we spend more money eating out than in. We choose where to eat out for reasons of convenience and location, food quality, nutritional content, value for money and to celebrate "special occasions". Restaurants, canteens, takeaways and other food outlets have more influence on what we eat than ever before, and they're starting to give us more of the information we want about the food they serve. And we can use public institutions such as nurseries, schools, hospitals and prisons to help put public policy into practice through their kitchens and canteens.





Our food choices also have an impact on the environment. A little under 20% of our ecological footprint – a measure of global environmental impact – comes from food and drink. Around a third of the food we buy is thrown into the bin and at least half of this could have been eaten. We drive our cars to the shops when we could walk or take public transport. For the first time, our generation has the opportunity to buy exotic foods and a wide range of seasonal goods all year round. This benefit can come with an environmental consequence.

Trends in adult overweight and obesity
(Scottish Health Survey 1995, 1998 and 2003)



What we choose



We are becoming choosier about the food we buy; the organic market in Scotland has grown from around £44m to around £66m in the last two years. Four out of five Scottish households have bought organic food at least once in the past year. Fair Trade groceries have grown by a quarter in the last year alone and are now worth around £90m a year in the UK. Fruit represents nearly half of that.

We're also becoming more interested in where our food comes from, seasonality and also whether our food is healthy. Half of us in Scotland say that we would now choose locally grown products if we could, and supermarkets are now labelling the origin and highlighting the nutritional content of some of their products.

But it's not enough for such food simply to be on the shelves. We need to know it's there, be able to get to it, afford it and know what to do with it once we've got it. So affluence, affordable transport, location, food knowledge and cooking skills all come into play. Not everyone has all, or even any, of these advantages. Big disparities still exist.



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Where we're going

As the Government, it's our job to promote prosperity and opportunity for Scotland in a way that's economically and socially viable and has the minimum impact or no cost to the environment.

We recognise that the food and drink industry plays a very important part in this and it's up to us really to understand what consumers and businesses want and need.

As well as the launch of the industry-led body, *Scotland Food & Drink*, we've spent time talking with all the main players in the private and public sectors. There's a growing consensus that we need a more joined-up approach to the way our food and drink industry develops in the future; an approach that takes into account the whole food supply chain, from primary producers through to retailers and their customers.

As a summary of our current thinking on food, we could say that we have to focus on healthier food, local food and help people to become more aware of the environmental impacts of the food supply chain, and where food comes from before it reaches the shelves. This will help us sustain and grow our important export markets that bring so much wealth to Scotland.



Here are some of things we've done since coming to power in May 2007:

- Encouraged people to ask where their food comes from and supported the National Farmers Union Scotland's *What's On Your Plate* campaign
- Set up the *Scottish Sea Fisheries Council* to encourage sustainable, responsible fishing, well connected to the market
- Started to take a fresh strategic look at the future of aquaculture
- Helped launch and part funded *Scotland Food & Drink*, the industry's own group
- Given £60,000 to the Royal Highland Education Trust, which teaches children about where food comes from
- Continued to support community food and health projects in deprived and rural areas to offer people a better choice of healthier food
- Had positive discussions with supermarkets and other major food retailers
- Launched the *Love Food, Hate Waste* campaign to reduce the amount of food we waste www.wasteawarelovefood.org.uk
- Published our plans for developing skills in Scotland, including food sector skills
- Set up a unit responsible for making sure that the Government and the food and drink industry work better together
- Launched *Scottish Food Fortnight 2007*
- Talked to food and drink producers, processors, retailers, restaurateurs and related organisations across Scotland about food issues
- Continued to support the *Healthyliving Award* for food outlets
- Continued to fund businesses that want to work together in the food supply chain
- Launched a free school meals pilot for primary pupils in selected areas
- Published a new action plan for health and healthcare in Scotland; made it a priority to tackle obesity and undertaken to publish a food and health delivery plan in 2008
- Backed the Scottish Grocers' Federation *Healthyliving Campaign* to promote healthier food in local convenience stores, especially in low-income areas
- Launched a Local Food Marketing Guide



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How will we get there?

Needless to say, these are just first steps. Our aim, as we've already said, is to have a future food and drink industry that's fully joined-up throughout the whole supply chain, and that plays an integral part in a healthier, wealthier and fairer, safer and stronger, greener and smarter Scotland.

We have our own ideas about how we might get there. So do many of the other people we've already talked to. Here's a summary of these ideas:

Producers

- Fishing sustainably and responsibly, bringing healthy, quality fish to the consumer
- Producing leaner meat
- Producing more organic meat, fish, fruit and vegetables
- Maintaining higher health and welfare status of livestock
- Growing more fruit and vegetables
- Working more closely with public sector food buyers
- Knowing their target markets better, training their employees to a high level, and selling the products that people want
- Investing in schemes so people know where food comes from
- Working with processors to make the most of the supply chain relationship

Processors and manufacturers

- Working more closely with public sector food buyers
- Innovating and developing more products with reduced salt, saturated fats and sugar content
- Using energy and other resources more efficiently, and generating less waste
- Training employees to a high level and creating new and imaginative products that people want to buy
- Working with producers to add value and help export sales
- Collaborating with producers and retailers to deliver a more sustainable food supply
- Adding value to primary produce and help develop markets at home and abroad

Retailers

- Maintaining mutually beneficial relationships with Scottish producers, processors, Government and consumers
- Using energy and other resources more efficiently, and generating less waste in their stores and distribution networks
- Promoting and selling more affordable and healthier foods that are clearly signposted and labelled
- Encouraging people to buy more Scottish produce

Hotels, restaurants and pubs

- Offering more fresh, seasonal produce
- Offering more healthy choices
- Giving people more information about the food they're eating
- Continually improving the quality of their menus

Consumers

- Eating less salt, saturated fat and sugary ingredients
- Making positive, healthy choices about food
- Buying fresh, seasonal produce at affordable prices
- Buying better quality products
- Throwing less food away
- Eating more fish
- Using fewer plastic bags
- Walking rather than driving to the shops
- Knowing more about where food comes from
- Learning more about taste, nutrition and cooking from an early age
- Buying food from producers with assured health and welfare standards





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What do we all need to do?

We know this is ambitious. We'll only realise it if we really work together, Government and industry, by forging links between the different parts of the food supply chain and making sure that everyone's included. These are some of the ways we might do it:



European Commission

- Keeping the playing field level
- Striking the right balance between free trade, biosecurity, food safety and consumer choice

Scottish Government and associated agencies*

- Continuing to work with producers to make sure they manage resources sensibly
- Supporting projects that support our vision of the future of food and drink in Scotland
- Supporting research
- Giving advice
- Continuing to talk to everyone about the future of food and drink in Scotland
- Helping vulnerable people and those on lowest incomes, especially pregnant women, babies and young children, and older people, to access affordable healthy food
- Making it easier for Scottish food and drink businesses to become suppliers to public sector organisations
- Advising people about the importance of safe food and good nutrition
- Supporting businesses in leading change to reformulated healthier products
- Encouraging and supporting people to make healthier food choices
- Encouraging restaurants and hotels to keep improving the quality of the food they serve
- Promoting food tourism and encouraging food promotions across Scotland
- Setting a good example in relation to our key objectives
- Maximising opportunities to promote the role of food in our health and on our environment when planning for major events, e.g. Glasgow 2014

*eg Food Standards Agency, NHS Health Scotland, VisitScotland



Local Government

- Encouraging Scottish suppliers to tender for public contracts
- Sharing best practice with other public bodies
- Championing a greener, healthier approach to food
- Ensuring that all schoolchildren of all ages are taught about food, e.g. initiatives such as Eco-Schools
- Taking responsibility for good nutrition in schools and other institutions
- Promoting local food networks and farmers' markets to encourage food tourism
- Increasing the collection of food waste from households for composting



Other agencies*

- Giving grants, advice and support
- Advising businesses how to minimise packaging and waste, and reduce unnecessary use of raw materials
- Promoting local food networks and farmers' markets to encourage food tourism
- Supporting research

*eg Enterprise Networks, Waste and Resources Action Programme Scotland, Envirowise

Producers

- Promoting Scottish meat, fish and other basic foods as part of a healthy diet
- Encouraging more people to buy local produce
- Researching and developing new products that fit with our vision for the future of food and drink in Scotland

Processors and manufacturers

- Making sure people know as much as possible about what they're buying
- Making best use of the available science to develop healthier products
- Avoiding unnecessary food and packaging waste



Industry bodies*

- Training and educating people throughout the food and drink industry
- Educating people in the catering trade about nutrition
- Supporting research into new products that fit with our vision for the future of food and drink in Scotland
- Promoting the available science to help develop healthier products and new processes
- Making best use of the knowledge we have and exploring new possibilities

*eg Scotland Food & Drink

NHS boards

- Using their buying power to provide fresh, nutritious food that's good value for money
- Setting high standards of nutrition throughout the NHS
- Encouraging Scottish suppliers to tender for NHS contracts

Voluntary sector/Community groups

- Sharing expertise and looking for wider connections
- Supporting communities through distribution solutions and food co-ops
- Distributing surplus food to disadvantaged people
- Encouraging people to buy healthier, greener food

Retailers, hotels, restaurants and pubs

- Giving people good information about the food they're buying or eating
- Offering a wider range of affordable, healthy, quality foods
- Avoiding unnecessary food and packaging waste

Academia

- Continuing to research food-related science
- Talking to industry so that scientific developments can be translated into new products and processes
- Researching links with nutrition and health





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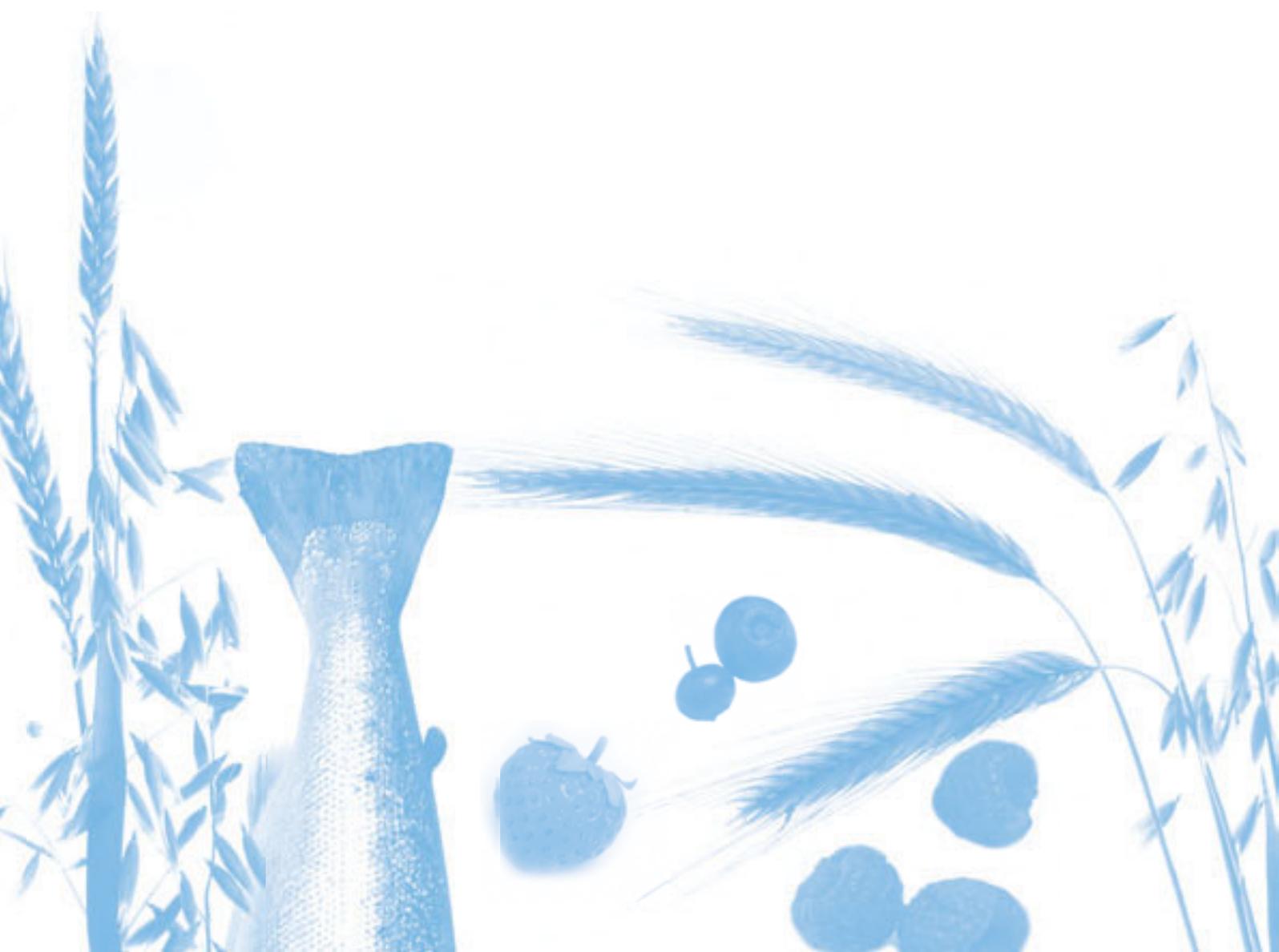
What do you think?

This will be the first time we've ever had a national food policy for Scotland. It's an opportunity to set a common agenda that suits all of us; Government, businesses, and people everywhere in Scotland; an agenda that we all believe in and one that can lead us towards the vision we set out at the beginning.

But none of what we've said here is cast in stone. It won't be till we've heard from you. How do *you* see the future of food and drink in Scotland? What do *you* agree or disagree with in what we've said here? What other ideas do *you* have? Let us know by:

- Taking part in our online food blog:
www.scotland.gov.uk/food/
- Writing to:
The Food Discussion at
Room 256, Pentland House,
47 Robb's Loan, Edinburgh EH14 1TY
- Submit your views to the team via our website:
www.scotland.gov.uk/food/
- E-mailing the food team with your thoughts:
food@scotland.gsi.gov.uk
- Talk to us about it or ask any questions:
Call 0131 244 6223







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