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British Meat Processors Association

Meat Industry Manifesto

Creating a sustainable future

BMPA

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The meat processing industry can survive without British livestock.

But British livestock farmers cannot survive without abattoirs.

What would this mean for Britain's food security?

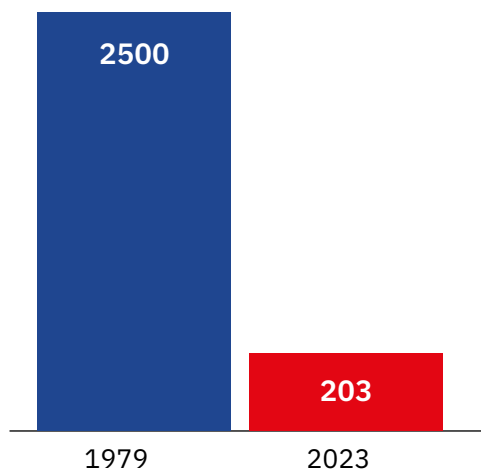
Falling herd sizes, labour shortages and increased bureaucracy pose a direct threat to the long term viability of the UK abattoir industry, which in turn poses a very real threat to national food security.

The meat processing industry can be separated into two distinct parts; the less profitable abattoir side and the cutting and processing side, which achieves better margins. If necessary the industry could replace domestic meat with imported carcasses and ‘boneless primals’ and focus on processing and packing products for sale.

But to find ourselves in that extreme scenario would mean we have thrown away one of the key strategically important parts of UK infrastructure and seriously jeopardised Britain’s food security.

Since the late 1970s when there were around 2500 abattoirs operating across the UK, the industry has seen a steady decline in those numbers to around 203 abattoirs today. We are relying on an increasing amount of imported meat and are now on a trajectory that has already seen a decline in UK herd sizes even as population numbers rise.

Decline in number of UK Abattoirs over 45 years



If we go beyond a tipping point, this will lead to a sharper decline and a heavier reliance on imported meat.

Food supply is of critical national importance. It’s akin to other key systems like transport, energy and healthcare, disruption to which has serious social and political consequences. It can’t simply be treated as a market-driven commercial issue.

Achieving domestic food security is an insurance policy against things going wrong in global supply chains. The more dependent we are on imported food, the more vulnerable Britain becomes to events outside our control like wars, climate change-driven shortages, and export bans where supplies are suddenly cut off.

The UK Government plays a central role in the success or failure of our food supply chain because it dictates the policy and regulatory landscape the industry must operate within. Decisions made today have long-lasting effects and shape the food supply chain of tomorrow. Today’s government policy is tomorrow’s legacy.

If we want food security for a growing UK population, we need a smoothly functioning domestic food supply chain; one in which all the interconnected constituent parts, from farm to fork, are operating efficiently.

This document seeks to describe what that picture should look like when everything is running smoothly, highlight the impact of government policy on different parts of the supply chain, and propose answers to the issues we raise.

As our population increases our herd sizes are declining.

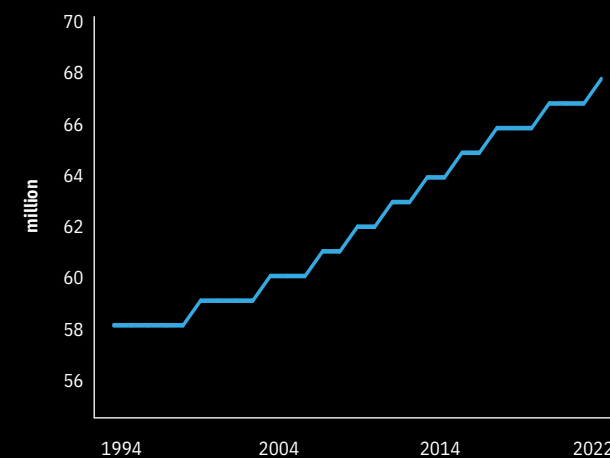


Fig 1: UK population growth

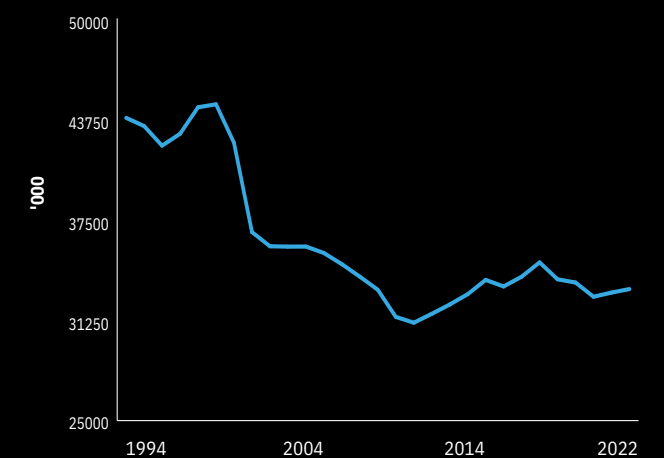


Fig 2: UK sheep herd size

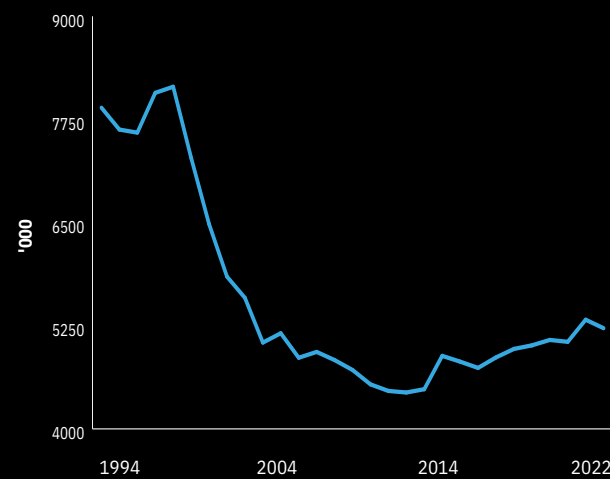


Fig 3: UK pig herd size

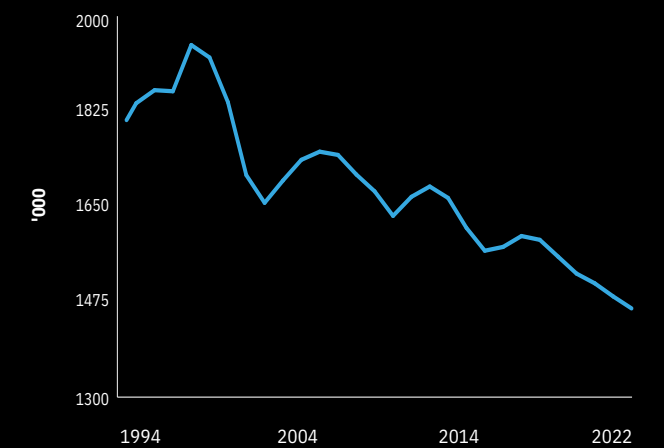


Fig 1: UK beef herd size



The Red Meat Eco System

Red meat in the UK is one of the most complex and interconnected food supply systems you'll find.

The make-up of a resilient meat supply chain remains constant. But the factors impacting it, many of which are within the Government's control, change frequently, and often without due regard for the knock-on effects and unintended consequences in other parts of the chain.

There are **7 key pieces** that make up the full picture. Here's how they should work.



Livestock Farming



This is the bedrock of a resilient domestic food supply system and the UK, with its abundant pasture and rainfall, has some of the best, most environmentally friendly conditions in which to produce red meat.

Few countries can boast such optimal production systems, so British meat has a deserved reputation for high quality and strict standards, which consumers here and around the world value highly.

British farmers are held to some of the highest standards in the world for animal welfare, food safety, environmental and traceability. They are not only custodians of the land but provide the economic backbone to rural communities.

To maintain a properly functioning, secure domestic farming industry requires commitment from both government and farmers. Indeed, many farmers are already demonstrating that they can improve food production while benefiting the environment. The two are not exclusive to one another, and in fact they often go hand in hand.

Farmers must be incentivised and confident to invest in future food production, knowing that they'll be able to make a decent living and get paid fairly for what they produce. They will need access to workers who are willing and able to take both seasonal and permanent jobs on farms.

Government must prioritise food production and tailor policy to support farmers to do this whilst at the same time improving environmental outcomes.

If we want the security of more home-grown food, high standards, better environmental management and affordable prices in the shops, the right policy levers and support mechanisms must be put in place, not just for farmers, but up and down the food supply chain.

If we are to avoid unintended knock-on effects, such policies must all be formed with the big picture in mind, not just one part of the picture.

UK livestock farmers along with supermarkets and consumers who demand a secure supply of meat reared to British standards all rely on an efficient domestic abattoir industry.

Without it, the UK would be entirely reliant on foreign countries for its meat supply, and British livestock farming would all but cease, devastating rural communities.

Perhaps less understood but just as important is the role abattoirs play in the dairy industry. The UK cow herd is made up of 44% beef cattle and 56% dairy cows, all of which, at some point, will need to pass through an abattoir.

To keep pace with the increasing demands of a nationwide, just-in-time supply chain capable of servicing the UK's big supermarkets, the abattoir industry has had to consolidate into a smaller number of bigger, more automated and technologically advanced abattoirs, strategically geographically located across the country to take in animals from regional farms.

This part of the supply chain is uniquely reliant on highly skilled workers. It's not a career that attracts a large number of local applicants, so a successful abattoir workforce is necessarily drawn from a much wider catchment, very often from beyond our shores where such careers are viewed differently and more widely adopted.

For years, now, the British meat industry has relied on overseas workers to fill key roles, not just in the abattoir, but throughout the business. The ability to attract overseas staff has supported the growth of the sector and has allowed the industry to be more export focused. Migrant workers have not replaced UK workers but supplemented them.

We must also keep pace with changing regulation in our biggest export market, the EU. CCTV cameras are now widely used by Official Veterinarians to monitor and record evidence of compliance with what are some of the highest standards of animal welfare in the world.

As technology is adopted and the workplace evolves, this is best achieved through a clear and open dialogue between industry and regulatory authorities like the Food Standards Agency to ensure that any new regulation is proportionate and, above all, deliverable.

Because overseas workers play such a key role in supplementing the abattoir workforce, government also needs to recognise and account for this when formulating immigration policy.

Abattoir

Meat Processing

Most people only see the start and finish of the meat supply chain. They see animals being raised on farms; then they see packed and labelled steaks, chops, sausages and ready meals on the supermarket shelves.

The British meat processing industry is at the centre of a complex and interconnected food supply chain. Every day our members supply 99% of fresh, processed and cooked meats and ready meals to Britain's supermarkets, restaurants, pubs, hospitals and schools through the highly effective just-in-time supply chain.

Over the last three decades, the UK meat processing industry has been quietly driving innovation and efficiency. We've made continuous improvements in every facet of the business from animal welfare and health and safety at work, through to the technology and automation that's enabled us to maximise yields, minimise waste and produce high quality, reasonably priced meat for British tables.

But innovation requires considerable investment commitment which, in turn, requires a stable, long term economic, regulatory and political environment for companies to commit to these transformational projects.

Automation and technology have played an increasingly important role in this evolution, but there are challenges to automating parts of the production process, particularly the difficulties surrounding robotic deboning which is still slow, low throughput, high cost and high maintenance.

Perhaps the biggest leap forward for meat processing will be seen with the introduction of AI. While still in the very early stages, current experiments going on in the US are pointing to a potential 9% reduction in the number of animals needed to achieve the same yield and output as now. This will be achieved through the ability to collect and process vast amounts of data across the supply chain from fat/water/salt content, staff availability, carcass size and bone placement through to the status of production orders.

The race is on to modernise, and this £10.3 billion industry will continue to evolve to the benefit the UK economy and consumers. To enable this, processors must be confident that government policy will support a healthy livestock sector, fairness in the supply chain, access to workers and a responsive and an adaptive regulatory environment that enables the adoption of new technologies.

If government policy provides a clear pathway and fertile environment for future investment, the red meat industry can meet the challenges of the next decade and beyond.

Workforce

Over the last forty years, the UK meat processing industry has evolved into a small number of larger, more efficient meat plants which are capable of servicing the nationwide demands of the large retailers that dominate the UK's supermarket landscape.

The large modern meat plant must run to the highest standards across the board if companies are to maintain their reputation and working relationships with their large retail customers, who demand such high standards as a pre-requisite.

BMFA members have been consistently improving pay and conditions in the meat industry as new technology and a more adaptive approach to staffing has been employed. Indeed, the average butcher's salary is now above the Government's official 'going rate' for that role.

But, despite considerable efforts, meat companies still struggle to recruit and retain British workers. This is mainly due to the geographical location of the plants, many of which must be near farming areas where the local surrounding population often doesn't yield enough workers.

It should not be overlooked that in these rural areas, meat businesses make a valuable contribution to the local economy, not just by bringing jobs to the area, but also supporting an improved local economy. Difficulty recruiting is also partly down to an historical (but outdated) perception of the work involved, and partly due to competition from other sectors such as retail, other manufacturing, hospitality and warehousing.

British workers will often need to relocate to take up those jobs which they're not always able or willing to do. This results in companies having to go through the expensive and bureaucratic exercise of bringing in foreign workers, who are prepared to relocate, via the skilled migration route. Unfortunately, that extra cost must then be passed on to British consumers via higher costs of production.

A smoothly running meat and livestock industry requires a steady supply of appropriately skilled workers who are willing to take on what are undoubtedly challenging and often physical roles. Because of the nature and complexity of the butchery skills needed to optimise carcass yield, the industry still requires a high degree of manual labour. This is despite extensive investment having already been made in the robotics, automation and AI technology that is currently available, but still unable to replicate certain tasks.

To make this part of the UK food supply chain picture work properly, we need reasonable access to migrant workers, the cost of whom does not exceed what an equivalent British worker would be paid for the same job. Alongside this the apprenticeship scheme needs a massive overhaul to make it fit for purpose so that businesses can utilise it in the way it was intended.

British people recognise the importance of a robust, home-grown food production system and the security and value that brings.



Retailers & Consumers

This is particularly relevant after recent shocks to food supplies following the invasion of Ukraine and weather-related crop failures in countries where we source some of our food.

Since Brexit, the discussion about opening-up the UK market to meat imports from other countries under new free trade agreements has become more prominent. People are now much more aware of the differences in methods of production and standards of the food they're offered. People want to buy British, and BMPA members enable that.

But food production in the UK has, for years, been subject to downward pressure on prices. The retail sector in the UK is one of the most competitive in the world and, while in the short term the UK consumer benefits from that fierce competition and resulting low prices, it puts huge pressure on the rest of the supply chain.

Consumers have been conditioned to pay less and less as a proportion of income for the food they eat. The average household now pays 11.8% of its income on food, down from 20% in 1970. It has been down as low as 8% prior to the cost-of-living crisis in 2020.

Farmers and manufacturers are finding it harder to operate on wafer-thin margins, which is why self-sufficiency is dropping. It's long been suggested that paying a little more now to preserve domestic food production will pay dividends in the longer run through less reliance on volatile overseas markets.

Perhaps the biggest impact on consumers has been food inflation, which they connect with the changing cost of imports. And, following much publicity surrounding the introduction of the new Border Target Operating Model (BTOM), people are now learning that the food imports which we rely on heavily are also subject to self-imposed extra costs in the form of extra bureaucracy and fees.

With this increased awareness and focus on food supply, the public want to be reassured that UK food security is not under threat and that the Government is supporting a thriving domestic food supply chain.

More than any other part of the big picture, government policy plays a dominant role. It shapes the trading environment in which the whole food supply chain operates and cuts across every aspect of our businesses from standards and environment to workforce and trade.

We understand that policy makers and legislators must balance the interests of multiple different stakeholders. And we encourage the push for greater transparency, higher standards and better accountability. But some policy decisions have been made without a full understanding of the impact they will have on the different parts of the food chain. They fix one problem, only to create another.

A good example of this is the recent change to minimum salary levels for Skilled Worker Visas. This may achieve lower migration for the Home

Office, but it compromises Defra's ambitions for a properly staffed, secure domestic food supply chain by cutting off a vital source of skilled labour that can't be filled solely with UK workers.

Such secondary effects can happen when one department fails to properly consult with industry experts who can advise on the potential unintended consequences and hidden impacts, which often manifest themselves in seemingly unrelated areas.

The Brexit Withdrawal Agreement and subsequent legislation changes have perhaps been the most influential in adding cost and complication to our food supply system. As we diverge further from EU rules, we must perform more and more compliance 'gymnastics' if we want continue trading in our biggest and most significant market. We discuss the impacts in more detail in the Trade Policy and Workforce sections.

To ensure this part of the picture supports a robust domestic food supply chain we need each government department, Civil Servants and industry players to collaborate much more closely when drafting and implementing legislation.

New post-Brexit rules don't improve efficiency and don't increase food production. They simply make the food we produce more expensive.



Policy & Regulation

The ability to trade overseas is key to the viability of the UK meat and livestock industry because the income received for the cuts of meat eaten by UK consumers does not come close to covering the cost of buying an animal and processing it.

The need to find an outlet for parts of the animal for which there is no market in the UK – known as achieving ‘carcase balance’ – is crucial. It’s what gives us the ability to maintain a thriving domestic livestock sector and keep food prices down for British consumers.

Equally, we don’t produce enough of the meat that UK consumers do like eating, which means we need to import any shortfall (around 49% of pork, 22% of beef and 21% of sheepmeat). According to AHDB data, 95%, 70% and 21% of these imports respectively come from the European Union.

As most exporting countries around the world have found over decades of trade, their nearest geographical neighbour is often their biggest and most significant. The UK’s biggest market for both imports and exports is the European Union. And it’s difficult to overstate its importance now and into the future, especially for fast-moving, just-in-time, perishable products like meat.

As an example, during the nine months to September 2023 the UK exported 12,295t of beef offal, 5,959t of which was exported to the EU bringing in £18,018,437, with 6,336t being sent to non-EU countries making only £10,268,927. This means that, when proximity and transport

costs are taken into consideration, our exporters get twice as much per kilo when selling to the EU rather than non-EU markets.

The ideal, cheapest and most efficient form that this trade can take is where there is no friction at our borders. Where it’s as easy to deliver a lorry full of meat to Paris as it is to send it to Liverpool, and vice versa. Where, because we’re all working to the same standards and rules in order to trade with each other, there’s no requirement to prove it via an extra layer of bureaucracy.

Beyond our biggest market, developing international trade for British meat demands a deep knowledge of the industry to facilitate

The longer we spend diverging from EU regulations, the harder and more expensive it will become to trade with Europe.

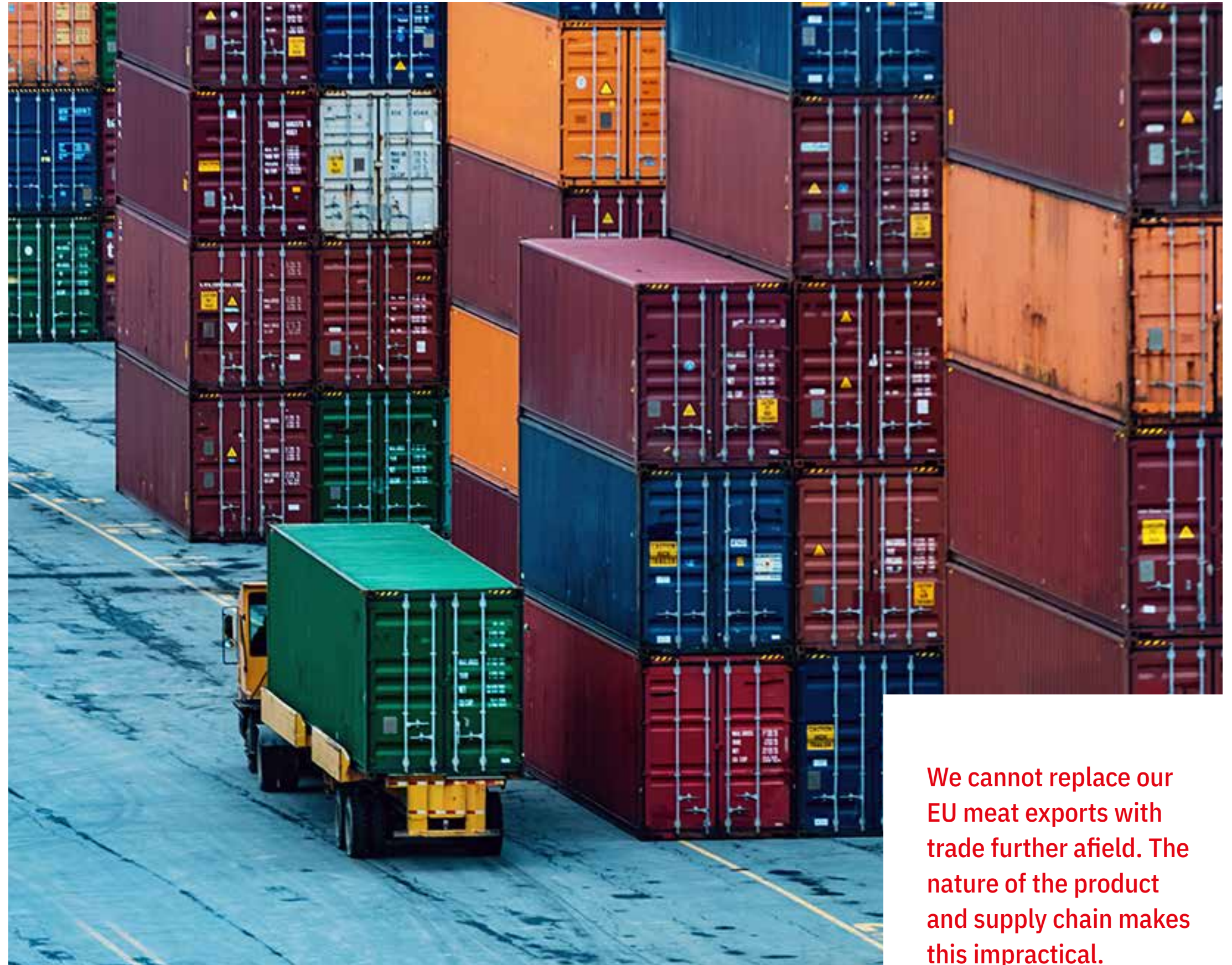
Imports & Exports

technical solutions and export approval. It requires close working relationships between producers, processors, UK Government departments and their overseas equivalents.

To make this part of the UK food supply chain picture work properly so we can preserve our future food security and viability, the British meat and livestock industry needs our politicians to work collaboratively with processors - the businesses that are operating on the front line of international trade.

For trade with our nearest market, we need paperwork, bureaucracy, veterinary checks, dual labelling requirements, and other similar trade barriers to be reduced, not added to. We had this in the single market and customs union, but a comprehensive veterinary agreement and Sanitary and Phytosanitary (SPS) alignment would also work. Apart from reducing trade friction, such a pragmatic approach could see an end to the increasingly complex problems around the Northern Ireland Protocol and remove the border down the Irish Sea.

As Britain looks to secure new trade agreements in more distant markets, we need well-briefed negotiators who understand the technical complexities and ramifications of these markets. We need deals that both protect domestic producers from too big an influx of product produced to different standards or with the help of more state support, plus we need overseas markets to be opened-up with conditions that UK processors are able to comply with.



We cannot replace our EU meat exports with trade further afield. The nature of the product and supply chain makes this impractical.

Section 2

Impacts of Government policy & changes we'd like to see

The reason we show government policy and regulation as such an important part of the big picture is because, more than anything else, it is political decisions and their long tail of impacts that can disrupt or distort the picture of a properly functioning food supply system.

Too often, policy decisions are made by different departments to address an issue in one part of the supply chain, but that precipitate problems in another.

In this section, we highlight some of the different areas of government policy that impact the meat industry and how they are interconnected.



Impact 01 Food Strategy

Authority:



| Government policy

We now have a food strategy that outlines government “ambitions and priorities to create a more prosperous agri-food sector” that “ensures a secure food supply in an unpredictable world.” But we are still missing a clear over-arching set of complementary plans and policies.

Despite the fact that Defra’s strategy document acknowledges that “the policy levers that influence the food system are dispersed across government” and that they must “join up within government” as well as “champion a collaborative approach by working in partnership with industry,” reality is proving somewhat different.

New agricultural policies are being concocted, new environmental schemes adopted, businesses restructured, capital grant schemes created and trade deals are being negotiated. And yet this fundamental piece of the jigsaw – a joined-up, collaborative approach between government departments and industry – is missing.

| How it impacts the industry

Changes to agricultural support mechanisms have taken away the safety net that enables some farmers to stay in production. This is in spite of the fact that livestock farmgate prices have been higher than in some European countries and the rest of the world. They also incentivise farmers to cut food production, which will cause long-term changes and distort our food and farming system. If it transpires that we got the strategy wrong, the damage will be difficult to reverse.

At the same time, UK food producers are still battling with what the Centre for Food Policy’s Professor Tim Lang described as a ‘leave it to the markets’ approach to food supply and pricing. Clearly, relying heavily on market forces to generate a secure, equitable food supply system has major drawbacks and puts further pressure on farmers and processors.

We are already seeing the industry has been contracting, with farmers struggling to make enough profits from livestock production and discouraged from investing in future production. They are already either leaving the industry or making changes to their businesses that will not benefit the UK’s food security.



| What can be done?

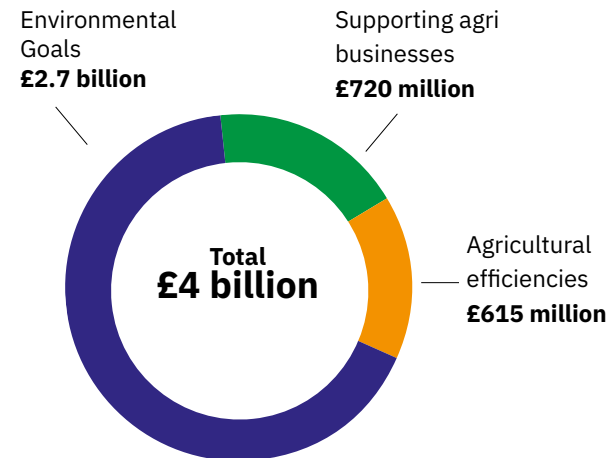
First and foremost, any government subsidies, incentives and support should be set for the long term - beyond the current parliament - and prioritise environmentally sustainable food production which farmers can confidently plan for. Public money should incentivise an improvement in productivity, stability and security of domestic food production as well as meeting environmental goals and not encourage farmers to move away from food production.

Put together, these three cornerstones of agricultural policy – productivity, food security and environmental management - would allow British farming to catch up with competitor countries like Germany, France and Denmark, whose governments have invested more into their farming sectors.

In its recent election manifesto, the National Farmers Union draws on modelling done by Andersons Centre which shows the level of public funding that would be required to deliver on government’s statutory environmental and other policy ambitions for agriculture between 2024 and 2030. It quotes a headline figure of £4 billion annually. £2.7 billion to meet the government’s environmental goals, £615 million for driving productivity and £720 million to support the economic stability of agricultural businesses.

We should avoid having generic rules for farmers and instead have more tailored support. Farm businesses vary hugely so a one-size-fits-all approach to payments and support will be too much of a blunt instrument. Any payments system should be less a subsidy and more a ‘safety net’ to provide support when needed but not to embed inefficiencies and poor practices.

Tackling the demand side is a harder nettle to grasp for policy makers. Light-touch regulation has allowed a fiercely competitive retail sector to wield considerable power over farmers and food suppliers. British consumers have become accustomed to paying some of the cheapest prices



The cost of supporting farmers until 2030

Source: NFU

relative to income in the world. But that only works for so long before producers find it unviable to continue producing food at little or no profit. The regulatory landscape should support businesses up and down the food supply chain to make a reasonable profit which they can re-invest to improve efficiency, productivity and meet tougher environmental challenges.

Any discussion on food strategy must also include trade policy. Britain will never be completely self-sufficient in meat. Indeed, it relies on imports and exports to support domestic meat supply.

We discuss this in more detail in the Trade and Borders section but, suffice it to say, trade policy must bolster export opportunities and offer British farmers some protection against cheap imports produced to lower standards than UK farmers are expected to meet.

One thing government could do is to exert more central control at the highest level to ensure the different departments that interact with the food supply chain coordinate and don’t work at cross-purposes. Whether this function is performed by an individual food 'tsar' or a wider group can be debated but it should have the remit to prevent policy decisions that impact one area of the supply chain (e.g. migration) precipitating problems in another.

Changes we’d like to see:

01

Any government subsidies, incentives and support should be set for the long term - beyond the current parliament - and prioritise environmentally sustainable food production

02

Public money should incentivise an improvement in productivity, stability and security of domestic food production as well as meeting environmental goals

03

Avoid generic rules for farmers and instead have more tailored support. Farm businesses vary hugely so a one-size-fits-all approach to payments and support will be too much of a blunt instrument.

04

Any payments system should be less a subsidy and more a ‘safety net’ to provide support when needed but not to embed inefficiencies and poor practices.

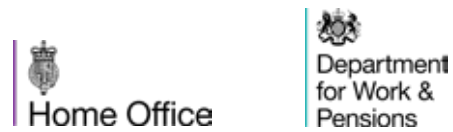
05

The regulatory landscape should support businesses up and down the food supply chain to make a reasonable profit which they can re-invest to improve efficiency, productivity and meet tougher environmental challenges.

Impact 02

Workforce & Migration Policy

Authority:



| Government policy

In 2021, the meat industry, along with many other sectors, suffered a cliff-edge decline in labour supply brought about by Brexit. This embedded a systemic labour shortage from which we have not recovered, despite our best efforts to recruit domestically.

This problem has been further exacerbated with the introduction, from 4 April '24, of the new one size- fits-all £38,700 immigration rule. It forces companies in need of migrant workers to take on overseas butchers at £38,700.

Using an average salary threshold figure of £38,700 fails to take into account that the average is made up of both higher and lower salaries; and it's often in the lower bracket that worker shortages are most acute.

| How it impacts the industry

Pre-Brexit we were able to tap the large EU labour market, which made up over 70% of our workforce. Post Brexit, many of those EU workers have gone home and few now want to come to the UK. This has left critical skills gaps in our workforce and diminished the industry's ability to buy and process British animals from farmers.

Companies had to resort to bringing in workers from further afield in Asia. But at an additional cost of around £10,000 - £15,000 per worker to recruit via the skilled visa route, it was not sustainable and has already cost in excess of £10 million for just two BMPA members alone.

The new £38,700 salary threshold for migrant workers has made things considerably worse. Imposing such a blanket rule to achieve arbitrary migration targets without considering the very diverse labour requirements and challenges of different industries will restrict access to migrants who can fill critical labour shortages whilst liberalising access where no vacancies exist.

There will be two consequences, neither of which is good for the farming, abattoir, processing, hospitality and retail sectors.

If companies continue to bring in overseas workers, it would instantly spark a raft of Equal Pay Claims under the Equality Act 2010, as existing workers have a legal right to demand to be paid an equal salary for the same work as their newly arrived overseas colleagues. British consumers will be hit with steeply rising costs from some of the key food, retail, hospitality and manufacturing sectors, and the UK will become less competitive on the international export market.



However, a more likely scenario is that it will go the other way. Businesses have told us that filling these vacancies will become completely unviable under the new rule. If they can recruit neither British nor overseas workers they're left with one choice – contract their business and reduce the number of animals they buy from British farmers and the amount of food they produce in the UK.

This would be anti-growth for UK Plc and damaging for the economy. It would also dent our food security and spark fresh animal welfare issues as animals initially start backing-up on farms with not enough processing workers to handle the volume.

Longer term, it will cause a contraction in our domestic livestock production, leaving us more dependent on imported food and vulnerable to unpredictable external shocks to our food supply.

| What can be done?

As the economy has shifted towards services and technology, attracting a domestic workforce has become increasingly challenging, with more young people favouring academic rather than vocational training. Companies want to cultivate a pipeline of home-grown talent but need to have certain barriers and restrictions removed to allow a flexible approach to recruitment and training.

Medium term, we would ask that government provides support for educational institutions to invest in specialised courses tailored to the specific skills required in regions, such as butchery, food engineering, quality assurance, and technical management.

We would also ask for greater flexibility in how the Apprenticeship Levy funds can be allocated to optimise the value for students and employers. Allowing shorter, proprietary training courses that can be tailored to specific companies' needs would be a great advantage. As would the ability to use funds to train apprentice support staff, the option to create a more occupation-specific version of

the Maths and English qualifications and the incorporation of digital technology and data skills into the current, predominantly paper-based, framework.

We want to take an active role to help shape the future of apprenticeships and technical education, so BMPA has recently joined the Institute for Apprenticeships and Technical Education's Directory of Professional and Employer-led Bodies (The 'Employer Directory'). It provides industry focused guidance to regulators Ofqual and the Office for Students to ensure training remains relevant and valuable to students and companies.

In industries that particularly rely on migrant workers, we are urging the government to adopt a coordinated approach between skills and immigration policy. There needs to be an increase in domestic skills before any sharp reduction in migrant workers can be implemented.

Short term, to avert immediate damage to the industry, we're calling on policy makers to include butchers on the new Immigration Salary List. This change would reduce the salary floor to £30,960, aligning the occupation with the Government's 'Going Rate.'

We support the sector-by-sector and job-by-job approach to assessing workforce needs advocated by Professor Brian Bell, chair of the Migration Advisory Committee. He describes a much more granular approach to identifying the industries, regions and roles where the labour shortage is most acute. This makes much more sense for our industry where the current blanket approach isn't working. This is because each plant can experience labour shortages for very different and localised reasons.

Changes we'd like to see:

01

Greater flexibility in how the Apprenticeship Levy funds can be allocated to optimise the value for students and employers.

02

Government support for educational institutions to invest in courses tailored to the specific skills required in regions, such as butchery, food engineering, quality assurance, and technical management.

03

The ability to use funds to train apprentice support staff and the option to create a more occupation-specific version of the Maths and English qualifications

04

Avert immediate damage to the industry, by including butchers on the new Immigration Salary List which would reduce the salary floor to £30,960 which is still 18% more than most British butchers are getting paid now.

05

Take a sector-by sector and job-by-job approach to assessing workforce needs because meat plants experience labour shortages for very different and localised reasons.

Impact 03

Trade and Borders

Authority:



Government policy

Since leaving the European Union, UK border controls have become the single biggest barrier to trade, first for exporters, but now for importers after the new Border Target Operating Model was finally implemented this year. Most of the difficulties, extra cost and additional bureaucracy stem from the fact that we are no longer part of the single market and customs union.

Despite much talk of taking back control of our own laws and borders by leaving the EU, the UK is still required to comply with EU rules if we want to sell our goods into that market.

Regulatory Divergence

Divergence away from EU rules poses an issue for British exporters. There was an increased pace of regulatory reforms in the run-up to European elections in June 2024 which contrasted with a slowing of the UK legislative agenda. The issue here is the UK's accelerating divergence from EU rules which will de facto apply in the UK for companies wishing to continue selling to our nearest and largest trading partner.

Impact

This is already causing problems, some of which we discuss later in this section, and will only become more problematic as time goes on. The longer we spend diverging from EU regulations, the harder and more expensive it will become to trade with Europe. And we cannot replace our EU meat exports with trade further afield. The nature of the product and supply chain makes this impractical.

There's also a danger that certain changes to standards we start to apply to imports from the rest of the world could impact our ability to continue trading with the EU if those standards differ.

Finally, without the close connection to EU legislative change we previously enjoyed, the UK must keep track of the increasing instances of divergence and respond accordingly if we want to continue to trade with the EU. This is becoming more unwieldy and things are already being missed, only to be discovered when goods get turned around at the French border for non-compliance.



Sanitary and Phytosanitary

With very few exceptions, some part of every animal which is produced for slaughter in the UK will be exported to the EU. For this to be allowed, every part of the UK supply chain must comply with EU public and animal health rules. The difference after Brexit is that we must now prove compliance by providing fully qualified vets to inspect and sign off all products of animal origin going to the EU and Northern Ireland.

And, since 30 April 2024, all products of animal origin that we import into the UK are also subject to the same red tape and compliance issues.

Impact:

The volume of Export Health Certificates (EHCs) issued for different commodities has risen sharply since the UK left the EU Single Market. This is still proving to be a major barrier to export due to availability of certifying officers, high costs and time constraints. We've seen over one million additional Export Health Certificates, over two million additional veterinary hours and over £200 million in added cost.

When the Transition Period ended and we left the EU the volume of meat exported dropped by 25% and has still not fully recovered. We are still down 16% from when we were part of the single market. And, contrary to what some are claiming, this lost trade in just-in-time, perishable food products cannot be replaced by selling into markets further afield. The very fact that Europe is on our doorstep enabled such trade.

'Groupage' trade (where several small consignments are sent on the same lorry, each with a separate EHC) has effectively ceased. Within a few days of the end of the Transition Period hauliers withdrew from offering groupage for products of animal origin. This is not just about the complexities of certifying multiple consignments and sealing vehicles but about the commercial risk of an entire truckload being turned back because one pallet is rejected.



Despite much talk of taking back control of our own laws and borders by leaving the EU, the UK is still required to comply with EU rules if we want to sell our goods into that market.

On the import side, the introduction of the new Border Target Operating Model (BTOM) has added considerable cost to importing meat after 30 April 2024. These new charges, made up of the Common User Charge and a separate Port Health Authority charge were not properly explained to importers and customs agents. Government guidance failed to explain the true extent of the charges, which it has transpired are substantially larger than anyone anticipated. Indeed, the impact on businesses was downplayed by government who, at the time, said it would be 'minimal', claiming that it would amount to a maximum of £145 per truck.

In reality a groupage load of say 5 consignments with 5 Common Health Entry Documents (CHEDs) and each with 5 product lines would come to £725 for a single truckload. This is especially punitive for smaller businesses moving smaller consignments.

But this is only half the story. There is an additional charge levied by the Port Health Authority which is described as an SPS documentary & inspection charge associated with any checks that goods may undergo consisting of documentary, identity and physical inspections. Ashford Port Health Authority (PHA) is charging for consignments coming through Dover and Eurotunnel at a minimum rate of £66 for consignments up to 6 tonnes and £11 per each tonne thereafter.

Over a 1000 consignments containing medium and high-risk products transit these points of entry daily, with most of them doing so without any physical checks and with the documentary check being completely automated. So, this additional charge will amount to hundreds of millions extra a year and represents a double charge on imports. This will only end up in one place – on UK consumers' food bills.

This has had a disproportionate effect on the loss of EU trade as these are often very high value, low volume products. Sending chilled meat using groupage is no longer an option.

This extra bureaucracy and cost has rendered British exports less competitive which means processors find it harder to achieve carcass balance and maintain already slim margins. Apart from reducing the amount we export, the extra costs that can't be absorbed by processors inevitably end up being felt either by UK farmers in the form of lower livestock prices or consumers in the form of higher food prices.

Animal Health Regulation

Another example of how the supply chain continues to adhere to EU rules is the recent change the EU made to their Animal Health Regulations (AHR) to include the need for farms to receive 'regular' animal health visits by a veterinarian in order that the meat from those animals can be exported to the EU.

It is worth pointing out that the EU does not stipulate the frequency of the visits or the method by which a farm must prove that a visit has taken place. And yet the UK authorities have decided to interpret this as an annual vet visit evidenced by a Veterinary Attestation signed by the vet. Effectively, the UK legislation has been 'gold-plated' by going above and beyond what the EU requires, adding yet another layer of UK-dictated bureaucracy and cost.

The decision to move to a vet-signed attestation was taken in May 2023 without any consultation or discussion with industry. Defra quietly changed the requirement from a farmer declaration to a veterinary attestation with immediate effect. The change was not publicised or even communicated to anyone in the industry but simply changed in the Notes for Guidance.

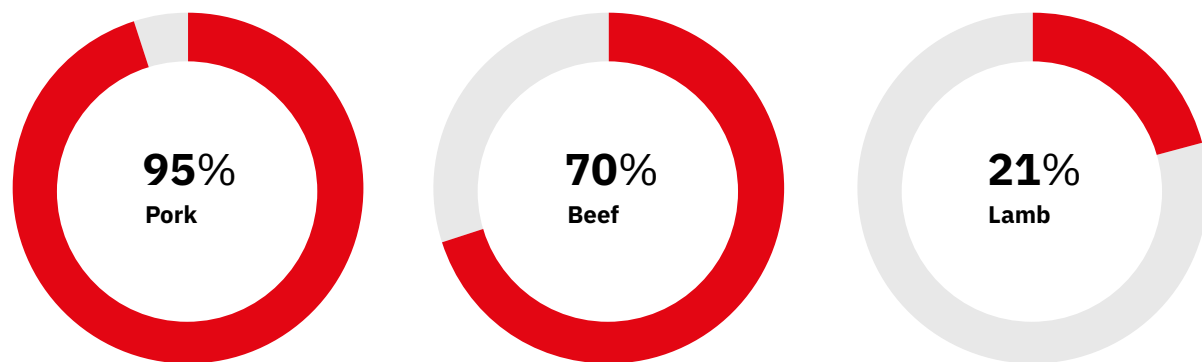
Impact:

There is general acceptance of the principle of regular veterinary visits and recognition that it's vital to be able to show compliance. However, this episode has been a good illustration of the need to improve communication and dialogue between government and industry.

Following the decision to impose the new rule with a hard deadline, we went through an unnecessarily long and painful process to explain to government the pitfalls and unforeseen consequences of what was being proposed. Had there been proper consultation with industry up front, this would have gone much more smoothly.

The good news is that thanks largely to the cooperative efforts of industry players, we now have a functioning system in place to track compliance, albeit a simplified, paper-based one that requires a complicated method of cross-checking different and unconnected systems for the required data. However, we must still wait an unspecified length of time for a full digital traceability system to be up and running.

Percentage of red meat imports that come from the EU



Source: AHDB



Not for EU Labelling

A new rule that hasn't been widely discussed is the requirement for 'Not for EU' labelling on retail-packed products in UK supermarkets. It's an attempt by government "to ensure no incentive arises for businesses to avoid placing goods on the Northern Ireland market." It means that, along with all retail-packed food products produced in the UK, products imported from EU and some rest-of-the-world suppliers will all need to bear the 'Not for EU' mark regardless of whether they sell into Northern Ireland or not.

This is another example of the Government deciding to impose something that is not required by the EU under the terms of the Windsor Framework but is purely self-inflicted.

Impact:

We've ended up penalising all businesses (both here in the UK and our overseas suppliers of retail packaged goods) regardless of whether they sell into Northern Ireland by mandating that they include "Not for EU" on the label.

We share the wider concerns that this will add significantly to costs as it will require duplication of labels, and businesses to hold more stock. It will also increase the risk of waste if packed products are limited to one market.

Currently, a GB business which is fully compliant with EU rules, as the vast majority are, can have a single multi-language label or, as in the case of trade with the island of Ireland, an English language label along with the addresses of a UK and EU based responsible business allowing it to use a single label to sell goods across GB and the EU.

If this option is lost, businesses will have to manage two sets of stock and labels without the ability to flexibly switch destination. The just-in-time supply chains that operate across the industry want manageable volumes frequently and flexibly to meet demand as it changes and to minimise stock and waste.

There are also some odd quirks to the system as things stand. For example, operators choosing to send goods to NI through the red channel are not bound by the 'Not for EU' rule as they will have met all the certification requirements for the EU. However, they would be required to market the same, fully compliant product in GB with a 'Not for EU' label.

Furthermore, goods produced in Ireland and marketed in Northern Ireland or GB will not need to meet this requirement creating a two-tier market in which consumers may perfectly reasonably assume that one set of product is good enough for the EU and another not.

UK trade policy

While most trade agreements were copied and pasted from previous EU agreements we already had, government has been negotiating new ones with trading partners like Australia and New Zealand. In the rush to sign these early deals, far too much market access was given away, particularly for Australian meat.

Unlike other countries, which include industry experts on the negotiating team to help anticipate potential pitfalls, UK trade negotiations have, to date, gone ahead without seeking sufficient technical advice.

This has resulted in some potentially disastrous deals that could pose a serious threat to domestic producers. The Australia deal in particular, which will eventually allow an unlimited amount of Australian meat into the UK, has been roundly condemned, even by ex-Defra Minister George Eustice, who was involved at the highest level of discussions. He said: "I no longer have to put such



a positive gloss on what was agreed...the truth of the matter is that the UK gave away far too much for far too little in return."

Our concern is that this will set the benchmark for future trade deals with countries like Canada and Mexico.

Impact:

In 2021 former Australian Foreign Minister, Alexander Downer stressed in an interview that Aussie meat companies would only be sending 'high end cuts' to the UK and not competing with British producers at the 'low end' (by sending meat for mincing or burgers, for example).

While this sounds reassuring, a quick look at how the beef market works shows why a small volume of imported meat can have a disproportionately big effect on British farmers.

To measure the impact of increased Aussie beef imports, we need to look at the value, not the volume of what's coming in.

As an example, a 20-foot container load of beef with 17,000kg of a full range of meat cuts might represent the meat from just 60 animals. A similar shipment containing only boneless sirloins (high value) would have come from over 1000 animals. If it were fillet steaks it could be three times that number.

To measure the impact of increased Australian beef imports, we need to look at the value, not the volume of what's coming in.

It's not the amount of meat by weight that matters it is the amount of high-end, high value cuts that will have a disproportional impact on the marketplace.

The key to understanding this lies in how the value from each animal is made up. Products like mince, stewing joints and even roasting joints, while they represent the bulk of the volume of what's produced, are the least profitable and, in some cases, are sold at less than the cost of production.

Where value and profit is made up is in the high-end cuts like sirloins, rumps and fillet steaks. Without these higher value products, beef production, regardless of where in the world it happens, wouldn't be viable.

The kind of sustained competition from overseas imports for the products that make up the profitable component of Britain's meat production will inevitably impact both processing companies and farmers, forcing some out of business and weakening the UK's domestic food security. It's also likely that this lost trade will not be fully replaced by trying to compete in export markets further afield with the likes of Australia.

| What can be done?

Regulatory divergence

The problems outlined above with regulatory divergence, sanitary and phytosanitary checks, animal health regulation, 'Not for EU' labelling and groupage would all largely disappear if the UK were to formally align with the EU.

This would remove the need for vets to certify things we are already doing, the need to provide EHCs and the need for animal and public health

border checks at EU Border Control Posts. Currently, certification alone is costing the industry over £60 million per annum and, given that we are already complying but still having to jump through all the certification and SPS control hoops to prove it with no added value, alignment would save hundreds of millions of pounds.

BMPA has, for a long time, advocated for such an agreement, principally because the EU is our largest and closest trading partner for fast-moving perishable food products. We rely heavily on being able to sell to the EU to support UK food security through a thriving domestic meat and livestock industry. The EU export market is vital for 'carcase balance' and key to overall profitability. Equally, we rely on the EU to supply the bulk of the 49% of pork, 22% of beef and 21% of sheepmeat that we need to import to satisfy UK consumer demand, which is only made more expensive by not having a veterinary agreement.

While this change cannot happen overnight it should be considered, but UK policy makers need to have a more in-depth understanding of the food supply chain and the cost implications that affect farmers, processors and ultimately the final consumer.

Trade policy

Developing international trade for British meat demands people with a deep knowledge of the industry to facilitate technical solutions and export approval. It requires close working relationships with producers, processors, different UK Government departments and their overseas equivalents.

Better, more collaborative consultation and engagement with industry experts during trade negotiations would go a long way to avoiding costly mistakes like the ones made in the UK / Australia deal where too much market access was given away, jeopardising our domestic meat and livestock industry.

Such oversight, scrutiny and technical input should come from a body such as the Board of Trade. But its current make-up, governance and remit don't give it the operational independence from government, nor the scope to consult widely and scrutinise trade negotiations both at the initial stage and just prior to agreements being ratified. The Centre For Trade Policy has published *Working paper 014, Restructuring the Board of Trade for the Twenty-First Century*, that discusses a plausible and workable proposal for its design, governance and operation.

We would also like to see a re-assessment of the recently established agri-food attachés, whose job is to identify demand and open-up new markets for British produce. While useful in many respects from a market intelligence, marketing and promotional point of view, our British attachés lack the status, technical knowledge and influence of other countries' Agriculture Attachés.

In most other countries this post would be part of a permanent foreign diplomatic office. This confers a much higher status and the remit to negotiate market access. As an example, Denmark has Minister Councillors for Agriculture who have the authority to make decisions on-the-spot on behalf of the Danish government. Such authority makes it much easier to get the right meetings with the right people and to negotiate at a higher level.

The UK government is committing more funding into developing new overseas markets. We would like to maximise its impact with the right overseas teams in place.

Changes we'd like to see:

01

Formal alignment with EU sanitary and phytosanitary regulations and a common veterinary agreement to remove most of the extra costs, bureaucracy and barriers to trade with the EU

02

Better, more collaborative consultation and engagement with industry experts during trade negotiations would go a long way to avoiding costly mistakes

03

A re-assessment of the recently established agri-food attachés to require more technical knowledge and confer a higher level of diplomatic influence similar to other countries' Agriculture Attachés

04

Re-structure the Board of Trade as an independent body with the scope to consult widely and scrutinise trade negotiations both at the initial stage and just prior to agreements being ratified

Impact 04

Environmental Policy

Authority:



| Government policy

The Government is pressing ahead with multiple initiatives aimed at achieving net zero by 2050. We're fully supportive of that ambition but, as with other areas, success or failure will depend heavily on how co-ordinated efforts are across the whole food supply chain.

We worry that new government farming support and incentive schemes and top-down environmental targets are pushing farmers to withdraw from food production in favour of non-food related activities. If growing food doesn't pay because the system of grants and financial support is designed that way, less British food will be produced and our food security will be eroded.

Currently, there is no cross-sector, cross-department co-ordinated framework to address environmental sustainability challenges and to satisfy the reporting requirements increasingly being demanded by retailers. This could and should be led by government to ensure a level playing field, to deliver UK sustainability targets in line with the UN's Sustainable Development Goals, and to maintain competitiveness on international markets.

In the absence of such an approach there is a danger that politicians will work in a departmental vacuum, focused on one aspect of environmental policy, but without considering the wider implications.

One thing that will bring multiple concerns together and require cross-departmental co-operation is the upcoming Land Use Framework. Delayed several times and now due some time in 2024, the framework should set out how to balance competing demands on UK land to meet multiple objectives for food production, carbon sequestration, nature restoration and housing amongst others.

Another area that we can see would benefit greatly from government taking a more central role is eco-labelling. There has recently been a proliferation of carbon foot printing apps and a rush by retailers to adopt one of these methods of measurement to fulfil their desire to 'inform' shoppers of their environmental impact via eco-labelling.



But the science behind these systems is still contested and is not providing a level playing field or a reliable baseline and benchmark on which advice can be built. Until we have a system of measurement that accurately reflects both the emissions (methane in the case of beef) and mitigations (carbon sequestration in pasture) built into the food we produce here in the UK, any eco-labelling or food apps have the potential to confuse and even mislead consumers.

| How it impacts the industry

The UK's livestock herd is already in decline. Further pressure on farmers to move from food production to other income sources and activities will see that trend continue, with obvious consequences for UK food security.

On the eco-labelling side, the lack of co-ordination and central government oversight has created a policy void which is currently being filled by the private sector. This may be an intentional tactic by government but is unhelpful in establishing a level playing field and clear shared objectives for investment and reporting. This is a particular risk in the area of 'carbon foot printing', carbon calculators and eco-labelling.

A recent review of the UK's net zero commitments by former MP Chris Skidmore acknowledged the fact that Government support will be required to help develop eco-labelling for consumers. It also highlighted that any system will need to be integrated with international standards due to the nature of cross border supply chains. Importantly for UK producers the review also stressed the need for industry to engage with government via Defra's Food Data Transparency Partnership to develop a methodology for measuring carbon impact that's consistent and accurate.

The UK's livestock herd is already in decline. Further pressure on farmers to move from food production to other income sources and activities will see that trend continue



This last point is what most concerns us. The race to be the first to market with a new carbon scoring system is picking up pace amid fierce competition between various schemes and data service providers. The commercial opportunities for the winner extend well beyond the food sector. Yet there are still a lot of assumptions being made about red meat which we don't want to leave unchallenged.

| What can be done?

The solution to both climate change and the need to feed a global population of nearly 10 billion people by 2050 will require a balanced approach. This will include some people reducing excessive meat consumption, as well as choosing meat that's been sustainably reared. It will also require us to develop more sustainable and innovative ways to farm food, coupled with the adoption of new technologies. We should also strive to reduce the £3 billion worth of meat we waste every year, mainly from our own fridges.

For the last 20 years meat processors have been introducing schemes that seek to improve our relationship with the natural environment. To reduce our impact and maximise resources the industry has committed to a diverse mix of initiatives including a nose-to-tail approach to farming and processing, improving the efficiency of energy, power and water usage, a focus on improving biodiversity, and clear tangible targets that benchmark the progress towards Net Zero. Put simply, we believe sustainability should be embedded in every business decision.

In a March 2024 report entitled Environmental Change and Food Security, the Environmental Audit Committee (EAC) recommended that "government should establish a cross government, cross-sector food security body to bring together all the actors in the food system to examine and make policy recommendations on long-term food resilience and environmental issues." A 'Food Resilience Forum' that takes a long-term view.

We agree. But this description sounds very much like the terms of reference for the already established Food and Drink Sector Council (FDSC), which held its inaugural meeting on 1 July 2021. Front and centre of those Terms are the sub-committees which are “the engine rooms for FDSC delivery.” But, according to the last set of meeting minutes, these sub-committees are still yet to be convened.

This is important because recruitment to the sub-committees is to include a wider array of businesses, industry bodies and those with practical, on-the-ground experience of the various challenges they’ll be tackling including workforce, food security and sustainability.

We’re now three years on with an even more urgent need to get to work on fixing these long-term problems but there has been a hesitance to get started, with the FDSC citing the wish to wait for various reviews, consultations and events including the Farm to Fork Summit before convening the committees. This vital work continues to be delayed, so we’d like to see ministers pushing for work to start on these workstreams.

Another of the Environmental Audit Committee’s suggestions was that concerns over food security could be addressed by classifying food security as a ‘public good’ under the UK’s new post-

Brexit farmer subsidy schemes, including the Environmental Land Management schemes (ELMs). This would see food security carry an equal weight to healthy soils, clean water and biodiversity.

Addressing the need to base government policy, including eco-labelling and how farming subsidies are structured, the group also said that government should develop a series of baseline metrics to measure key environmental priorities. Only when these metrics are widely agreed and in place should attention be turned to mandatory carbon and biodiversity food reporting.

We need to ensure that the methodology and metrics eventually adopted are not flawed and that they accurately reflect the sustainability credentials of British meat versus meat produced in different systems around the world.

We understand from the government response to the EAC’s recommendation that “Defra’s sustainability strand of the FDTP is not currently planning to introduce mandatory environmental reporting for food and drink companies.” While this is re-assuring in one way, it still leaves the door open for food companies to have to navigate an unworkable plethora of voluntary schemes each with slightly different methods of measurement.

The UK’s livestock herd is already in decline. Further pressure on farmers to move from food production to other income sources and activities will see that trend continue.

Changes we’d like to see:

01

We’d like ministers to ensure the Food and Drink sector Council appoints the specialist sub-committees and includes a wider array of businesses, industry bodies and those with practical, on-the-ground experience of the challenges they’ll be tackling including workforce, food security and sustainability

02

We’d like to see food security classified as a ‘public good’ to give it equal weighting to healthy soils, clean water and biodiversity under the new post-Brexit farmer subsidy schemes

03

We want government to take a central role in developing a series of widely accepted science-based metrics to measure key environmental priorities.

04

If eco labelling is to be introduced, they should accurately reflect the sustainability credentials of British meat versus meat produced in different systems around the world.

Impact 05

Regulation & standards

Authority:



| Government Policy

We can be justifiably proud of the high standards of our regulated food supply chain. It reassures consumers here and in our overseas markets that buying British is best for quality, animal welfare, environmental standards and food safety. But there must be a balance between demanding those high standards and the over-bureaucratisation of how companies are asked to demonstrate they meet them.

Over recent years we have seen a significant increase in the volume and complexity of compliance. Post-Brexit red-tape for exports and now imports has added a huge amount of extra cost and time to operations. Over and above the compliance necessary to satisfy the competent authority, producers and processors voluntarily sign up to schemes like RSPCA and Red Tractor. But these are now becoming more onerous as the scheme owners seek to expand their offering and paid services.

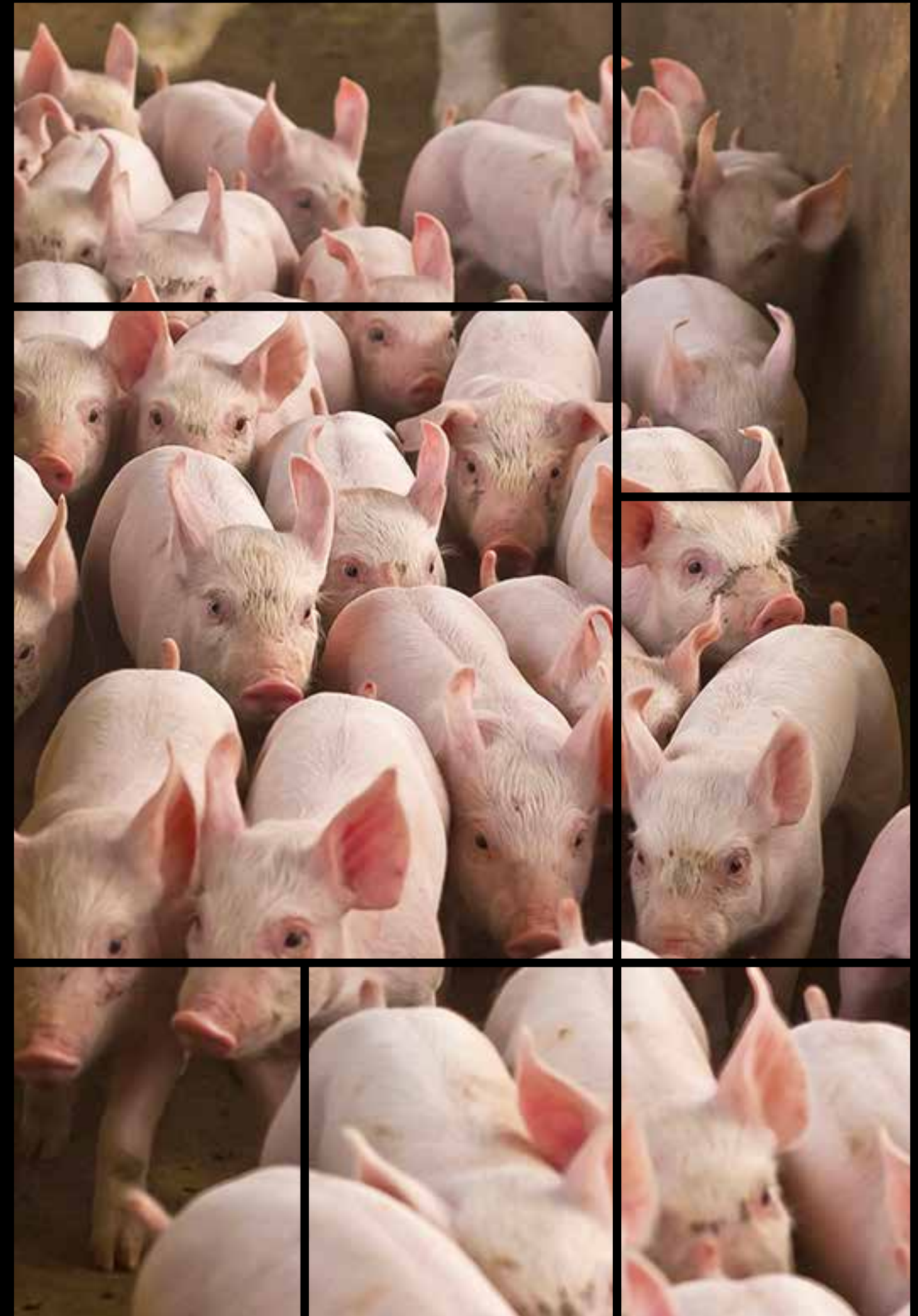
In a bid to differentiate themselves from their competition, retailers are increasingly demanding their own supplier audits over and above those carried out by the competent authority and Red Tractor. Because each retailer audit is slightly

different, it puts further pressure on suppliers to undergo multiple audits which, essentially, are doing the same thing.

Despite having a single market for goods across the UK, there is additional complication when dealing with the devolved administrations which all have their own competent authorities and work to slightly different rules. Trade between Great Britain and Northern Ireland is further complicated by the additional requirements of the Windsor Framework.

Very often we've seen proposals which will simply be unworkable in the context of the UK food supply chain and the systems available.

This happened recently when the UK government decided to change the requirement for non-assured livestock suppliers to provide a veterinary attestation of regular farm visits instead of a farmer declaration. The new requirement was written into guidance and published with no consultation or communication with the industry and took everyone by surprise. Moreover, it provided no clear details of exactly when and how the new rules should be implemented. This change would have instantly rendered a large amount of product ineligible for export.



It transpired that this was in response to an EU directive that all farms should have a regular vet visit. However, the EU did not stipulate how often and how this should be demonstrated. The system proposed by the UK government sought to 'gold-plate' the regulation over and above what was required by the EU. It took months of discussions to explain the various pitfalls and shortcomings of introducing such a top-line mandate.

All this translates into millions of pounds a year in additional cost that is spent on bureaucracy; extra people filling in extra paperwork. It doesn't improve efficiency; it doesn't increase food production; it simply makes the food we produce more expensive.

| What can be done?

We've written about individual government policies and how they impact different parts of the food supply chain throughout this document. The one recurring theme is co-ordination between departments and consultation with the businesses that must comply with new regulation being implemented.

We'd like to see policy makers consult much more closely with businesses so they understand the implications (both obvious and hidden) of their proposals. We'd also like to see cross-departmental consultation for the same reasons.

As environmental concerns impact what and how we produce our food, we'd like to see government take a central role in developing a series of baseline metrics to measure key environmental priorities, backed by un-disputed science. Any requirements or standards that are developed from those metrics should be proportionate so food producers can reasonably comply with them.

We'd also like to see a simplification and standardisation of compliance to remove the duplication and administrative burden on companies.

This in turn would bring down the cost to the consumer, whilst preserving a universally accepted and understood system of standards.

On trade, we'd like to see a matching of British Standards by new trading partners with whom we sign free trade agreements. This is so British producers, who work to some of the highest standards in the world, are not disadvantaged and priced out of their own market by product produced to lower standards or that's benefitted from a higher degree of state aid.

Finally, we'd like to see the UK reach a common veterinary agreement with our biggest trading partner, the European Union. It's a simple, pragmatic solution that would restore our two-way trade in food to the efficient, cost-effective system it was before, but without the need to re-join the EU.

A common veterinary agreement would simply formalise the UK's adherence to the food standards that it must already follow in order to trade with the EU. And it would do away with the mountain of red-tape and extra cost that the industry is currently labouring under. It would be the single thing that would bring the biggest benefits to the UK food supply chain and British shoppers alike.

A common veterinary agreement would simply formalise the UK's adherence to the food standards that it must already follow in order to trade with the EU.

Changes we'd like to see:

01

The single thing that would bring the biggest benefits to the UK food supply chain and British shoppers alike is a veterinary agreement with our biggest trading partner the EU.

03

Any requirements or standards that are developed from newly developed environmental metrics should be proportionate, so food producers can reasonably comply with them.

02

Government taking a central role in developing a series of baseline metrics to measure key environmental priorities, backed by un-disputed science.

04

Matching of British Standards with those of our new trading partners with whom we sign free trade agreements.

A final word

The British red meat sector produces some of the world's highest welfare meat that has one of the lowest environmental footprints because we use the natural resources this country has been blessed with: rain and grass.

The meat and livestock industry makes a vital contribution to the social, economic and environmental wellbeing of the UK, and provides the food security people are increasingly cognisant that we need.

For us, the perfect picture of a food supply system that works equally for citizens, nature and the economy involves pragmatic policy and regulatory settings that support sustainable food production, technical innovation, access to unfettered trade and a stable workforce.

To achieve that balance, we need all government departments involved in creating that policy to work collaboratively with each other and with

the producers and processors who work on the front line of food production, who can offer on-the-ground experience of the challenges and opportunities they face.

Our sector's success sustains the nation in more ways than one. And its continued success will be government's future legacy to the nation.

The British Meat Processors Association wants to work constructively with government and with partners up and down the food supply chain to help shape a sustainable food supply system for the next generation of British people.

Let's make it happen together.



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