



Meeting of the Northern Ireland Food Advisory Committee On 24 October

**At Corr's Corner Hotel, 315
Ballyclare Road,
Newtownabbey, BT36
4TQ**

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Agenda

1. 9.00am - Welcome and Housekeeping
2. 9.05am - Minutes of Meeting of 24 July 2019
3. 9.10am - Chair's Update and Director's Report
4. 9.35am - Conall Donnelly (NIMEA) – Production processing
5. 9.55am - Seamus Leheny (Freight Transport Association) – Logistics
6. 10.25am - Aodhán Connolly (Northern Ireland Retail Consortium) – Retail
7. 10.55am - Break
8. 11.10am - Michelle Patel and Rebecca Gillespie (FSA) – NI Food System Report
9. 12.00pm - Discussion
10. 12.55pm - AoB
11. 1.00pm - Close

PAPER FOR DISCUSSION
Minutes of Open Meeting on 24 July 2019

Executive Summary

Attached are the minutes of the 24 July NIFAC meeting.

Members are invited to:

- Agree minutes as a true record of proceedings.

FSA Northern Ireland

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**REF NIFAC MINUTES 1/19
OPEN MEETING OF THE NORTHERN IRELAND FOOD ADVISORY
COMMITTEE (NIFAC) ON 24 JULY 2019, 9.30 AM, AT THE FSA OFFICES,
BELFAST.**

Those present:

NIFAC Members

- Colm McKenna – Chairman
- Lorraine Crawford
- Fiona Hanna
- Aodhan O’Donnell
- Greg Irwin
- Phelim O’Neill (via TC)

FSA Executive

- Sharon Gilmore – Head of Standards and Dietary Health
- Ruth Perez-Moreno – Head of Consumer Protection
- Helen Smyth – Senior Communications Manager
- Jayne McGlaughlin – NIFAC Secretariat

Guest Speakers

- John Hood – Invest NI
- Gráinne Moody – Invest NI
- Joy Alexander – Department of Agriculture, Environment and Rural Affairs (DAERA)
- Paul Cabrey – Public Health Agency

Apologies

- Elizabeth Mitchell
- Sara McCracken
- Maria Jennings

1. Welcome and introductions

- 1.1. The Chair welcomed all NIFAC members to the meeting, noting apologies from NIFAC members Elizabeth Mitchell and Sara McCracken. The Chair also informed the meeting that NIFAC member Phelim O’Neill would be joining the meeting via Teleconference.

2. Minutes of the meeting of 10 April 2019.

- 2.1. The Chair asked if there were any comments on the minutes of NIFAC's meeting on 10 April 2019. No issues were raised, and the Secretariat agreed to publish the minutes.

Action Point 1 - Secretariat to arrange for the publication of the minutes of the 10 April NIFAC Open meeting.

3. Chair's Report and Director's Update

- 3.1. The Chair updated the Committee on meetings that he had attended since the previous NIFAC meeting in April. He mentioned the June meeting of the Board and thanked NIFAC members for their comments which they had provided on the June Board papers.
- 3.2. The Chair informed members that Emily Miles had been appointed as the new Chief Executive of the FSA and will take up her post in September.
- 3.3. NIFAC were then apprised of the ongoing process of appointing new members to the FSA Board. The Chair explained that new Board members would not be in place for the September Board meeting, but work was being done to appoint three new members as well as a Deputy Chair.
- 3.4. The Chair updated members on the arrangements for the Board meeting taking place in Belfast on 17 and 18 September 2019 and noted that NIFAC members were invited to attend a lunch with the Board and FSA NI staff members.
- 3.5. He also updated members that since the last meeting in April 2019, the new strategy for allergen labelling law had been approved. The Chair explained that this will require food businesses to include full ingredients labelling on pre-packaged foods.
- 3.6. Sharon Gilmore explained that a report from Maria Jennings had been included within the papers and highlighted the following items:
- Consultation on risk-based approach to monitoring biotoxins in bivalve molluscs
 - Quick Reference Guide for Traceability, Withdrawals and Recalls within the UK Food Industry
 - CalorieWise
 - Update on the Food Hygiene Rating Scheme (FHRS) in NI
 - Raw Drinking Milk Labelling Regulations
 - Allergens.
- 3.7. On the consultation on risk-based approach to monitoring biotoxins in bivalve molluscs, she explained that the consultation was taking place and was being led by the Hygiene Team in FSA in NI.

- 3.8. In relation to the traceability, she noted that the FSA in NI is working to encourage small businesses to become aware of the Reference Guide and to get themselves involved.
- 3.9. Sharon explained that McDonald's received the Calorie Wise Gold Award in July 2019. The Gold Award sticker will sit alongside the Food Hygiene Rating Scheme sticker in each McDonald's restaurant.
- 3.10. She noted that a lot of good work is progressing in relation to the FHRS in NI and positive results are showing.
- 3.11. On Raw Drinking Milk Labelling Regulations, she explained that they came into operation on 29 June 2019 and will amend the current labelling provisions for Northern Ireland (NI) to inform vulnerable consumers of the potential risks associated with consumption of raw drinking milk.
- 3.12. Sharon explained that the Government announced plans to introduce new allergen legislation which will mandate full ingredients labelling for foods which are prepacked for direct sale. The progress of this in NI will move at the same pace as in England to implement the legislation.
- 3.13. Following the update, Fiona Hanna noted that beside the FHRS information for each business and establishment on Just-Eat online it states: '*Rating provided by the Food Standards Agency and your local authority. This rating may have changed*' and asked if we could be certain that this was up to date with the last inspection. Sharon said that she would forward the query to the appropriate team in the FSA in NI.
- 3.14. Phelim O'Neill commended the FSA in NI for its work on the UK-China Beef protocol that will allow for exports of beef to take place.
- 3.15. Greg Irwin noted the interesting feedback from delegates who had attended the 'Formulating for a Healthier Future' event on 29 May 2019 which the FSA in NI hosted in partnership with the College of Agriculture, Food and Rural Enterprise and Agri-Food and Biosciences Institute.
- 3.16. NIFAC members congratulated the team for their work on the Balmoral Show and noted the increased number of visitors to the stand in May 2019 compared with 2018.
- 3.17. The Chair thanked Sharon for this update.

4. Future FSA Strategy

- 4.1. The Chair introduced the discussion on the future FSA Strategy, explaining that the FSA Strategic Plan 2015-2020 would be used as a basis for the new strategy. The Chair noted that the new strategy is a tremendous opportunity to try things out in NI given the remit of the FSA in NI including dietary health. He explained that the presentations would be heard firstly from John Hood and Gráinne Moody from the Food, Drink and Tourism Division in Invest NI,

followed by a presentation from Joy Alexander from DAERA and from Paul Cabrey from the Public Health Agency. He invited John Hood and Gráinne Moody to deliver this presentation. The presentation regarding the Food and Drink Sector Strategy 2019-2020 covered:

- An overview of the Food and Drink sector in NI;
- Employment by sector and subsector;
- Sector sales by market destination;
- Employment by location;
- Invest NI support;
- Strengthens and weaknesses, opportunities and threats;
- NI strategic leadership;
- The ambition for the Food and Drink sector;
- Supporting growth;
- Market opportunities and trade;
- Leadership and skills; and
- Innovation.

4.2. The Chair thanked John and Gráinne for their presentation and the overview of the Food and Drink Sector and Strategy in NI and invited Joy Alexander (DAERA) to deliver her presentation on the Future Food Policy. The presentation covered:

- The challenges and the opportunity;
- What do we want to see;
- Why a NI Food Policy is important;
- Where are we now with development;
- Why the time is right for a NI Food Policy;
- What needs to happen;
- How to improve strategic alignment;
- Key principles;
- Foundations of a Food Policy;
- The consumer and changing expectations;
- Implementation Structures;
- How the process will begin; and
- Next steps and innovation lab.

4.3. The Chair thanked Joy for the presentation and information and invited Paul Cabrey (Public Health Agency) to conclude the presentations with his presentation on food borne illness, disease patterns and emerging trends in NI. His presentation covered:

- Sources of data;
- Surveillance;
- Estimated ratio of community cases to those reported to national surveillance;
- Changes in testing and introduction of PCR testing;
- Whole genome sequencing;

- Campylobacter;
- E. Coli;
- Salmonella;
- Cryptosporidium;
- Giardia Lamblia;
- Longer term trends; and
- Outbreaks.

4.4. The Chair and NIFAC Members thanked the presenters for their presentations and contributions to the meeting.

4.5. There then followed a discussion with the three presenters and Dr Brian Green from the Institute of Global Food Security at Queen's University Belfast where the following points were made:

- Commenting on the current FSA Strategic Plan (2015-2020), it was agreed that it is important that the FSA continues to focus on the theme of trust, noting that this must continue to be a core theme that runs through any future FSA Strategy. It was agreed that this should include consumer trust in the FSA and the continued development of trust in the FSA from the food and agri-food industries as well as relevant stakeholders.
- Following on from the discussion around trust, it was acknowledged that it is important to consider the role of the consumer. It was agreed that consumers should have as much information available to them as possible, so they can make informed choices and to encourage positive behaviour change. There was a suggestion that it would be useful if there were ways to share data that is available around consumers to understand the full picture. It was noted that it is important to try and engage those consumers who are sometimes the hardest to reach, an issue which is becoming increasingly important with food poverty coming to the fore.
- Discussing behaviour change, Dr Brian Green from Queen's University Belfast shared information regarding Project Daire which is based in Derry/Londonderry. Dr Green noted that the project focuses on achieving positive outcomes for children and young people by enhancing educational attainment, promoting health and wellbeing and developing. The project was noted with interest as well as the important role of educating children about food and nutrition at the earliest possible stage.
- In relation to EU Exit, the specific issue of the border with the Republic of Ireland was acknowledged and it was emphasised that it is possible that this could lead to future issues with imports and exports, as well as the possibility of increased food related crime. It was emphasised that such issues should be examined in future planning and the current all-Island working arrangements should be taken into consideration.

- The information provided by Invest NI which accentuated the issues surrounding employment in the food and drink industry and the challenges that EU Exit is placing on employment due to possible skills shortages was noted with interest, including the continued issue of getting people to work in meat processing.
- Members welcomed the information that was provided in relation to the establishment of a NI Food Policy which is in the early stages of development. It was noted that it is pleasing to see the cross-cutting nature of this work with the hope that the new Food Policy will look at the bigger picture in NI. It was agreed that it is important that the FSA in NI continues to be involved in the development of the Food Policy.
- It was cautioned that the FSA must remain focused on being a reasonable regulator and was noted that this is an area that should be considered in any future FSA Strategy.

Any Other Business

4.6. No further business was raised, and the meeting was closed. The next Open meeting will be held on 24 October 2019.

ACTION POINTS

Action Point 1 - Secretariat to arrange for the publication of the minutes of the 10 April NIFAC Open meeting.

PAPER FOR INFORMATION

**Update from the Director for Regulatory Compliance, People and NI to NIFAC
24 October 2019**

Executive Summary

Attached is the FSA in NI Director's update to the Committee for October 2019. This report covers the period from 24 July 2019 to 15 October 2019.

- No action by members is necessary.

FSA Northern Ireland

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Food Is Safe

Less than thoroughly cooked beef burgers

The FSA is conducting a review of the FSA guidance on less than thoroughly (LTTC) cooked beef burgers (The safe production of beef burgers in catering establishments: advice for food business operators and Local Authority officers). The guidance was produced in May 2016 and there was a minor revision to the guidance in June 2018 regarding consumer messaging at relevant catering establishments.

The scope of this guidance extends to England, Wales and Northern Ireland (NI) and only applies to beef burgers. The aim of the review is to provide clarity to Food Businesses and Local Authorities on legal responsibilities and the regulation of businesses that produce/serve LTTC beef burgers. An initial engagement event took place on 17 September with key stakeholders, which explored how the guidance is being implemented and where it might be improved. The LTTC working group is now looking at revisions in light of feedback received and an amended version will be subject to a full consultation in November or December.

Shellfish Sanitary Surveys

A procurement exercise is currently underway to set up contracts with third parties to carry out sanitary surveys, sanitary survey reviews and provisional representative monitoring point (PRMP) assessments across England, Wales and NI. The FSA has a legal requirement to conduct sanitary surveys and reviews on classified shellfish production areas to ensure official control monitoring is risk based and representative of the environmental impacts affecting the waterbody. Following the establishment of internal processes to conduct sanitary surveys and survey reviews, the FSA is now in a position to award contracts to meet our legal obligations as outlined in Regulation 854/2004. A tender will be published in October for contract award 1 April 2020.

Gathering and Using Science, Evidence and Information

All Island Food Poverty Network Conference

The All Island Food Poverty Network delivered their annual conference in Dublin on 24 September, organised by FSA and Safefood. The morning session explored whether social prescribing has a role in addressing food poverty and how community food projects could support this approach. A new afternoon session was added to the conference this year to allow academic institutions on the island of Ireland to showcase recent research in the area of food poverty. The event was very well attended with registrations from a wide range of health professionals, government departments and agencies and those in strategic positions in the voluntary and community sector who have a common interest in reducing food poverty.

Research on the Cost of a Healthy Food Basket in Northern Ireland

[Research on the cost of a healthy food basket in NI](#) was published in September 2019, jointly funded by Safefood and the FSA. The research found that households on a low income need to spend up to a third of their take-home income to afford a minimum essential healthy food basket. For some households in NI, this figure is almost half of their income. It was established that the composition and location of households had an impact on costs; with those households with children, and in particular teenagers, and those living in rural areas needing to spend more. In householders where the only income was from state benefits, they spent a larger percentage of income on food than households where one adult is in employment. In general, households on a low-income tend to eat less well, have poorer health outcomes with higher levels of excess weight and its complications.

Promotions Research

In January 2019, the Department of Health and Social Care (DHSC) set out in a consultation their intention to ban promotions of foods and drinks high in fat, sugar and salt (HFSS) by price and by location. The intention is to set out next steps in due course as detailed in a [Green Paper](#) which was published in July 2019. The Scottish Government also undertook a public consultation to invite views on its proposed approach for restricting the promotion and marketing of targeted foods that are high in fat, sugar or salt (HFSS) where they are sold to the public. The Scottish Government published their [consultation analysis](#) in September 2019.

The FSA is in the process of purchasing Kantar data specifically on promotions to inform the policy position for NI. It is intended that this data will be available by November 2019 and will be shared with key stakeholders.

PHE Sugar Reduction Progress Report

Public Health England published the [second sugar reduction progress report](#) in September 2019.

The report provided an assessment of industry progress towards the 20% sugar reduction ambition over the first 2 years of the programme. For retailers and manufacturers, more progress has been achieved in specific food categories, particularly for breakfast cereals, yogurts and fromage frais. However, for most of the other food categories sold by retailers and manufacturers, there have been missed opportunities and less progress made. Based on more limited nutrition information, the out of home sector appears to have made more progress towards the government's ambitions on sugar reduction in comparison to the retailers and manufacturers, based on simple average sugar levels.

The report also includes an assessment of changes in sugar content and sales of drinks covered by Soft Drink Industry Levy (SDIL). For drinks subject to the SDIL, the average sugar content decreased by 28.8% between 2015 and 2018.

Reformulation Project with the NI Bakery Sector

The FSA in NI has employed a Food Technologist to undertake a project focusing on reformulation with the bakery sector in NI. The Food Technologist will work on three pilot reformulation projects over the next 12 months. At the end of the project, technical guidance on how to reformulate bakery products to improve the nutritional quality will be disseminated to the NI bakery sector via a technical workshop. To achieve the outcomes of this project the FSA in NI will work closely with external stakeholders including Invest NI and CAFRE.

UK-wide Consultation on Fortification of Flour with Folic Acid

A UK-wide 12-week consultation seeking views on the mandatory fortification of flour with folic acid closed on 9 September. The four-country consultation was led by the Department of Health (DoH) in NI, DHSC, the Scottish Government (SG) and Welsh Government (WG) with over 1,400 responses received from members of the public, the industry and charities. The aim of the policy is to help reduce neural tube defects in fetuses by raising the folate levels of women who could become pregnant. An estimated 90% of women aged 16 to 49 have a folate status below the level recommended to reduce the risk of an NTD-affected pregnancy. The Scientific Advisory Committee on Nutrition recommends the mandatory fortification of flour to improve the folate status of women of childbearing age. Folate is a term for natural folates found in many foods, such as green leafy vegetables and the synthetic form, folic acid. A decision to mandate the fortification of flour with folic acid would require a legislative change to the Bread and Flour Regulations.

Food Allergen Review

The Food Information (Amendment) Regulations (Northern Ireland) 2019 propose to introduce full ingredient labelling of allergens in all prepacked for direct sale (PPDS) foods and will come into force by Autumn 2021. Equivalent legislation is currently being progressed in England by DEFRA, Wales by FSA and Scotland by FSS. In September the FSA notified the Commission in advance of making the Regulations in NI and Wales, as required in EU Regulation 1169/2011. This notification is required for any proposed food information legislation to be adopted under national measures for non-prepacked foods, with a minimum three month stand still period to allow the commission and Member States an opportunity to consider.

Food allergy, Human, Analytical and Regulatory Implications Conference

The Institute for Global Food Security, Queens University Belfast is hosting a conference on 21 October in Belfast, on the complex matter of food allergies. There will be a number of keynote speakers highlighting the consumers' perspectives of living with food allergies and the management and regulatory environment of food allergens in food manufacturing and catering settings. Current research and analytical evidence is being reported. One of the keynote speakers is Dr Michael Walker who presented at the NIFAC allergen themed meeting in May 2019. Sharon Gilmore, Head of Standards and Dietary Health will be presenting on the regulatory and policy context of food allergens. <https://foodimplications.wixsite.com/foodallergy>

Being the Best Organisation We Can Be

FSA Contribution to NI Government's Outcomes Delivery Plan (ODP)

The FSA contributes to Outcome 4 of the NI Government's Outcomes Delivery Plan (ODP), "We enjoy long, healthy, active lives". The Executive Office recently published the [End of year Report](#) for the ODP 2018-2019 which can be viewed at:

The Executive Office has advised that the ODP will be extended for a further period pending the return of Ministers and the production of a new Executive Programme for Government. The FSA's Dietary Health team was asked to provide two actions for the ODP for the next six months. These actions have focused on implementation of the Calorie Wise scheme in the Out of Home sector and the scone reformulation work in partnership with CAFRE.

Retail Forum

The FSA in NI held their biannual Retail Forum on 19 September 2019. The Forum was well attended with representation from some of the main UK supermarkets, NI grocery wholesalers and the British Retail Consortium. The meeting was attended by representatives from Invest NI who provided valuable insights into the key issues facing the food industry, and a representative from DAERA who updated members on the new Future Food Policy for NI. The Retail Forum also provided members with an opportunity to outline their concerns and the challenges they face ahead of EU exit.

Eating Well Choosing Better (EWCB) Steering Group

The FSA in NI held their biannual Eating Well Choosing Better Steering Group meeting on 19 September 2019. This meeting was attended by representatives from the retail, manufacturing and out of home sectors and Government bodies. All attendees provided information on efforts being undertaken on food product improvement including; collaborative working between the FSA and District Councils in NI to produce a Healthy Catering Toolkit for different types of food businesses, the launch of health and nutrition policies by retailers aligned with government reformulation policies and the development of new product ranges by manufacturers which are lower in nutrients determinantal to health. This meeting also provided Invest NI with the opportunity to update members on the next cycle of innovation vouchers.

A key action for all Group members is to develop a proposal for an EWCB industry targeted seminar in mid-2020. The objectives of the FSA-led seminar would be to highlight the principles of reformulation and reduction of key nutrients and promote both the technical and financial local support available to the industry through the NI knowledge providers and Invest NI innovation schemes.

Aligning Incentives

Regulating Our Future (ROF) engagement event in Northern Ireland

On 26 September 2019, the FSA in NI held a ROF engagement event to update NI District Councils (DCs) on the Food Standards elements of the ROF programme. We delivered presentations exploring a new official controls delivery model and an intelligence-based approach for food standards interventions. 9 out of 11 DCs were represented and were encouraged to provide challenge to the direction of the programme.

This engagement opportunity was also used to update DCs on our work to ensure we have operable legislation on exiting the EU. The FSA in NI has worked with FSA colleagues and other Government Departments, including DEFRA, DHSC, DAERA and DoH to ensure retained EU law (UK Acquis) and the NI domestic legislation will remain fully operable after the UK's exit from the EU. Good progress is continuing with the necessary amendments being made to legislation relating to food and feed safety and hygiene, food standards, composition and labelling (including nutrition).

Register a Food Business Service

Following the agreement from all 11 DCs in NI to connect to the new digital service of registering food businesses online, work has been ongoing to finalise connection.

Currently 8 of 11 DCs are connected to the service (with the final 3 working to go live before EU Exit). In August, colleagues from FSA London, Wales and NI visited councils that were connected to provide advice and test the service and feedback on any issues. Work has already commenced on the next phase, which will aim to promote the legal requirement for food businesses to register with their DCs and to work with partners, such as Invest NI and OGDs to encourage use of the new digital service by signposting food businesses to the application on www.gov.uk.

FHRS three-year review of the mandatory scheme

The FSA is currently undertaking a statutory review of The Food Hygiene Rating Scheme in NI. The review will feed into future decisions around FHRS NI legislation and operational guidance. It will be informed by a number of pieces of research including bespoke qualitative research with business users of the scheme in NI and through information gathered via local authority audits and through DC forums. The review will be completed by the end of this year and a report will be provided to the Department of Health. The report will set out any recommendations for change to the scheme along with supporting evidence.

Legislation

Official Controls Regulation 625/2017

The process for implementing the new EU Official Controls Regulation 625/2017 (OCR) has continued with a public consultation. The consultation period commenced

on 29 August and ended in NI on 11 October. The consultation seeks stakeholder views on the impact of the OCR on NI food businesses and enforcement authorities. The package includes an impact assessment and a table of the main changes to existing official controls regulations.

Parallel consultation exercises are being held in England and Wales. FSS are similarly consulting with Scottish stakeholders. The OCR will be implemented in EU member states on 14 December 2019. Although not directly related to EU exit, the OCR is likely to feature in EU exit negotiations. Statutory instruments are being drafted in preparation for implementation.

EU Exit

The Operational and Policy Delivery team attended an event arranged by the Northern Ireland Food and Drink Association to help small and medium businesses prepare for EU exit. A variety of questions from businesses attending were confidently answered by FSA staff.

A number of FSA in NI policy colleagues attended and offered advice to food business operators at the recent EU exit information events organised by DAERA. The events aimed to help raise businesses awareness of the impact and changes a no deal EU exit would have on agri-food businesses and to answer any specific queries businesses had. Feedback from the events was excellent and the DAERA Permanent Secretary has thanked all involved.

FSA colleagues continue to feed into discussions with DAERA and DEFRA regarding EU exit issues, including the development of guidance for food businesses and DCs in the event of a no deal exit and input into test scenarios to identify and resolve potential issues with the import and export of food in the event of a no deal exit.

The FSA is aligned with the Northern Ireland Civil Service communications unit, coordinating and sharing relevant communications, visits, events and stakeholder meetings.

M Jennings
Director for Regulatory Compliance, People and NI

PAPER FOR DISCUSSION

The Food System in Northern Ireland: Review of available evidence

Executive Summary

Attached is a paper by Rebecca Gillespie, FSA Principal Research Officer, regarding the food landscape and system in Northern Ireland. The paper will be presented by Rebecca Gillespie and Michelle Patel, FSA Head of Social Science.

Members are invited to:

- Consider the paper and presentation and
- Comment and give advice.

FSA Northern Ireland

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The Food System in Northern Ireland: Review of available evidence (October 2019)

Introduction

The Northern Ireland Food Advisory Committee (NIFAC) was invited by the Chair of the FSA to set out the food landscape in Northern Ireland to aid understanding of the dynamic food system and the opportunities and risk within it. This initial paper produced by the FSA Analytics team, in collaboration with colleagues in FSA Northern Ireland, reviews the available evidence to inform further work by the committee. All evidence is in the public domain.

The food system is characterised by complexity, and overlays an already dynamic, political and social system. To facilitate a systems approach we have based our definition of the components of the food system on recent academic work in this field. The 2019 City University Food Policy Unit publication [What is the food system?](#) breaks down the food system in terms of components of the food chain and other elements of the system (such as the economy).

We have adapted this as a framework through which to identify the areas on which NIFAC might wish to focus. For consistency, we have used this structure to arrange/present available evidence and identify potential gaps in knowledge in both this report and a similar report provided to the Welsh Food Advisory Committee.

This paper gives an overview of the available evidence on relevant topics and identifies where there are evidence gaps. It finishes with some key questions for consideration which will inform the ongoing work of the committee in this area.

Given the complexity of the food system, a systematic review and synthesis of available evidence will need to be an iterative process of which this paper forms a first stage.

Food system in Northern Ireland: Key findings

Farm inputs: The number of agricultural employees increased 1% to 49,250 in 2018 (the highest level since 2006).

Distribution transport and trade: The food and drink sector is locally focused, making the majority (86%) of its sales within the British Isles. The subsectors most reliant on export markets are animal by-products, milk and milk products and drinks, whilst eggs and poultry, meat were the least reliant.

Food retail/service: Recent research found that people in Northern Ireland were enthusiastic about local produce, viewing it as very high quality. These preferences were however contrasted with the tendency to buy food on the basis of price.

Agricultural production: Grass based cattle (both beef and dairy) and sheep account for 89% of total farms, with more dairy, and cattle and sheep farms than any of the other UK nations.

Processing: The food and drink processing is dominated by four subsectors – beef and lamb, dairy, poultry, and pork, which together account for 71% of the sector's turnover.

Eating: Chicken and turkey were the most frequently eaten type of meat, with 88% eating it at least once a week.

Food Chain in Northern Ireland

Limited available evidence on waste disposal and research and technology through the food chain.

Economy: Agriculture accounts for: 1.7% of Northern Ireland's GVA (compared to UK 0.5%) and 2.7% of total employment (more than double the UK wide level of 1.1%).

Health: As per the rest of the UK, the majority of adults do not meet the "5-A Day" recommendation for fruit and vegetables.

Environment: Almost a third of all greenhouse gas emissions in Northern Ireland coming from agriculture (compared to 10% in the rest of the UK).

Society: Similar to the UK as a whole, 80% of households reported as having high food security and 12% had low or very low food security.

Evidence review:

1. The food chain: the chain of people and events through which food is produced and supplied to everyone that eats, and the value that is generated distributed and lost through its ordinary functioning.¹

1.1 Farm inputs (inputs used in production, including land, labour, capital, and other farm inputs such as seeds, fertilizers, crop protectants, and animal feed).

The 2018 Agricultural and Horticultural Census reports 49,250 people employed in **agricultural labour**, a 1% increase since 2017 (from 48,700) and is at its highest level since 2006 when 49,950 people were employed².

The costs of **other farm inputs** are increasing. Gross input (or 'intermediate consumption' the goods and services consumed or used in the production process) increased by 8% (between 2017-2018) to £1.58 billion: Feedstuff costs, which accounted for over half (55%) of the gross input figure, rose by 13% in 2018 (to £867 million) whilst total machinery expenses increased by 5% (to £156 million, largely due to a 10% increase in the cost of fuel & oils).³

Recent research (2019) by the Forestry, Farming and Countryside Commission, found the increasing costs of inputs have placed extra productivity pressure on Farmers as the cost of inputs rises faster than the value of their outputs. Additionally, Farmers reported that when they are able to invest in improved productivity, there is little economic benefit as the value is captured elsewhere in the supply chain.⁴

1.2 Agricultural production

Land use in Northern Ireland is dominated by improved grassland management for dairy, beef and sheep production. Grass based cattle (both beef and dairy) and sheep account for 89% of total farms, with more cattle and sheep farms than any of the other UK nations⁵.

The 2018 Agricultural and Horticultural Census reports that between 2017-2018²:

- The number of cattle decreased 2% (to 1.63m)
- The number dairy cows decreased 1.5% (to 310,700)
- The number of beef cows decreased 4% (to 255,900)
- The sheep breeding flock increased 1.7% to 956,500 ewes (including lambs and other sheep the entire flock totalled 2.01 million)
- The number of pigs decreased 2.4% (to 633,600) but the number of sows increased 3.6% (to 49,600)
- Broiler numbers increased by 4.8% (to 17.7 million birds), while the size of the commercial laying flock increased by around a tenth (9.3%, to 4.3 million birds).

In 2018 there was a 4.8 per cent decrease, to 42,100 hectares, in total agricultural cropped areas. The total area of cereals fell 8% to 29,700 hectares and the total area of potatoes grown decreased by over 11% over the same period².

1.3 Distribution, transport and trade

The Northern Ireland food and drink sector is locally focused, making the majority (87%) of its sales within the British Isles. Great Britain accounts for around half (47%) of sales, and the United Kingdom 73%. The Republic of Ireland is the sector's largest export market, accounting for 14%⁶. The subsectors most reliant on export markets are animal by-products, milk and milk products and drinks, whilst eggs and poultry, meat were the least reliant. The EU market is most significant for the milk and milk products, fish and drinks subsectors⁵.

It is not known how much food is imported. In terms of day-to-day operations in farming and food production, cross border movements of animals and goods are stitched into the fabric of our economy and many people's lives and livelihoods⁴. Further work can identify and explore evidence in this area (some of which may not be in the public domain).

1.4 Processing

The food and drink processing sector (those businesses that are involved in processing activities that change the nature of a raw material destined for human consumption) is dominated by four subsectors - beef and lamb, dairy, poultry, and pork, which together account for 71% of the sector's turnover.⁶

The total gross turnover of the processing sector increased by almost two thirds (60%) between 2000 and 2017. Between 2016-2017 total gross turnover increased by £463 million (10%, to £4,810 million). 2018 provisional estimates indicate an increase of 3% to £4,952 million (up £142 million).⁷

Certain sub sectors of food processing are more significant than others in terms of their gross turnover, employees and total sales, with the largest being the beef and sheep meat, milk and milk products and poultry meat sectors. These three sub sectors combined account for 65% of the gross turnover, 54% of the employees and 65% of the entire food and processing sector.⁵

Food and drink processing is a significant part of the Northern Ireland economy:

- Contributing more in GVA terms than farming⁵
- Playing an important role in supporting the local supply chain, supporting 26,000 farms across Northern Ireland. For every 1 job created in food processing, 1.9 jobs are created in the wider economy⁷ and
- Distributing economic value right across NI, including into many rural communities, serving an important economic development function⁶.

1.5 Food retail and service

Survey evidence from 2018 found that almost all respondents (94%) shopped for food in large supermarkets and more than half (56%) shopped at independent butchers. Other types of retailer were used by a minority of respondents, most commonly mini supermarkets (40%) and local or corner shops (40%).

Respondents in Northern Ireland differed from those in Wales and England in the types of shops they used; for example, respondents in Northern Ireland were more likely than those elsewhere to use independent butchers and garage forecourts, and less likely to use supermarket home delivery services.⁸

Recent research by the Food, Farming and Countryside Commission found that people in Northern Ireland were enthusiastic about local produce (such as potatoes, dairy products, beef and lamb), finding organic and free-range food appealing, and viewing local produce as very high quality. These preferences were however contrasted with the tendency to buy food on the basis of price.⁴

1.6 Eating

Survey evidence reports that in 2018⁸:

- People in Northern Ireland were more likely to eat meat, less likely to eat fish and less likely to eat raw vegetables and salads than people in England. They are half as likely to be vegetarian or vegan
- One in five respondents reported that they suffered an adverse reaction when they ate certain foods (14%) or avoided certain foods that might cause an adverse reaction (7%)
- The most common food groups that people reported having an adverse reaction to were cow's milk and cow's milk products (25% of affected respondents), cereals containing gluten (11%), fruit (9%) and vegetables (9%). Among those who reported an adverse reaction to one or more types of food, 40% said they suffered from a food intolerance, and 11% said they suffered from a food allergy
- Chicken and turkey were the most frequently eaten types of meat; 88% of respondents ate these at least once a week. This compares with 66% who ate cuts of beef, lamb or pork at least once a week, 59% who ate pre-cooked meats, 40% who ate cured or dried meats, 50% who ate sausages and 25% who ate burgers at least once a week
- One in five (19%) respondents ate ready meals at least once a week, and a smaller proportion (16%) ate pre-packaged sandwiches at least once a week.

Between 2012-2018⁸:

- The consumption of red meat has fallen (from 85% to 66%: adults eating at least once a week)
- The consumption of pre-cooked meats has fallen (from 75% to 59%)
- The consumption of chicken has remained relatively stable (from 92% to 88%).

1.7 Throughout the chain: Waste and Disposal

There is limited evidence on waste and disposal throughout the chain food, however a 2010 paper reported that the capacity for dealing with food waste in Northern Ireland through anaerobic digestion was growing.⁹

People in Northern Ireland are more likely than people in Wales and England to be concerned about food waste (60%, compared to 45% and 51%, respectively).¹³

Further work can identify and explore evidence in this area (some of which may not be in the public domain).

1.8 Throughout the chain: Research and technology

There is limited evidence on research and technology throughout the chain food, and the 2019-21 food sector strategy reports a lack of research and development (R&D) Investment: In 2017 business expenditure on R&D by the Food, Beverages & Tobacco sector in Northern Ireland was estimated at 0.47% of turnover; an estimated 3.9% of all R&D by NI businesses⁶.

Further work can identify and explore evidence in this area (some of which may not be in the public domain).

2. Other aspects of the food system: Health, Society, the Environment, and Economics, all shape, and are shaped by the food system. They are at the root of many of the problems that food policy needs to solve and all are affected as a result of the ripple effects when any food policy solution is implemented¹.

2.1 Health

In Northern Ireland, as in the rest of the UK, the average diet does not meet Government dietary recommendations. The most recent data from the National Diet and Nutrition Survey (12/13-16/17) reports, that¹⁰:

- Consumption of 5 A Day fruit and vegetable portions was below the recommendation in all age/sex groups. The majority of children (94%) aged 11 to 18 did not meet the 5 A Day recommendation, with the average consuming 2.5 portions a day. For adults, average consumption was around 3.4 portions per day with around 80% not meeting the 5 A Day recommendation
- Average consumption of oily fish was well below the recommended 1 portion (140g) per week
- For all age/sex groups, average intakes of saturated fatty acids exceeded the current recommendation of no more than 11% of food energy

- Intakes of free sugars exceeded the recommendation of no more than 5% of total energy from free sugars in all age/sex groups. Overall, 95-97% of children and 84-87% of adults did not meet the recommendation
- There was evidence of low intakes for some vitamins and minerals, particularly in the 11 to 18 years age group.

The Northern Ireland Health survey estimates that in 2017/18 almost two thirds of adults were either overweight (37%) or obese (27%) and around a quarter of children aged 2-15 were either overweight (18%) or obese (9%).¹¹

2.2 Society

Food security means having access at all times to enough food that is both sufficiently varied and culturally appropriate to sustain an active and healthy lifestyle. FSA survey evidence for 2018 found that in Northern Ireland:⁸

- 80% of households reported high food security, 12% reported being marginally food secure, and 8% of households had low or very low food security. Similar proportions as the UK (79%, 13%, 8% respectively)
- People were *more likely* than people in Wales to feel that they will have access to an affordable, healthy diet in the future (86% v 75%)
- One in six respondents reported that their household had worried in the last 12 months about running out of food before there was money to buy more (same level as Wales, Northern Ireland and England combined).

There is an evidenced relationship between income and healthy eating with adults aged 19 to 64 years in the lowest income groups having poorer diets (significantly lower intakes of fibre, fruit and vegetables, and higher intakes of NMEs) compared to those in the highest income groups¹⁰. This relationship will likely be strengthened with the prediction that Northern Ireland's food bills are forecast to become joint-highest with London at £3,201, despite average gross household incomes in Northern Ireland being over a third (37%) lower. Food price inflation is expected to see the annual food bill increase by £389 in Northern Ireland over the next five years.¹²

In common with many parts of the UK, Northern Ireland has seen a proliferation of food banks in recent years, driven largely by austerity policy.⁴

2.3 Environment

Whilst Northern Ireland meets its global obligations through the United Kingdom as a signatory to a number of international agreements and through contribution to a range of UK-wide targets and commitments, it is purported that NI performance in meeting them is poor. A recent report by the FFCC gives the following examples⁴:

- United Nations Framework Convention on Climate Change: The UK is currently committed to a 57% greenhouse gas emissions reduction by 2030.

The UK has recently committed to achieving net zero emissions by 2050 which implies a reduction of much more than 57 percent by 2030. Northern Ireland, however, struggles to reach the 35% reduction required (as its contribution to the 57 percent commitment above)

- EU Water Framework Directive: Northern Ireland will miss the 2020 target of achieving Good Ecological Status (GES) for 70 percent of water bodies and is likely to miss the 2026 target of 100 percent.

How food is produced in Northern Ireland is central to the ability to meet these obligations, with almost a third of all greenhouse gas emissions in Northern Ireland coming from agriculture (compared to 10% in the rest of the UK).⁴

2.4 The economy

Agriculture is more significant in Northern Ireland than any other part of the UK in terms of employment and economic contribution and as such anything that effects the sector, either negatively or positively, will have impacts. Agriculture makes up 1.7% of Northern Ireland's Gross Value Added (GVA) compared to 0.5% across the UK as a whole, and the industry accounts for 2.7% of total employment in Northern Ireland, more than double the UK-wide level of 1.1%.⁴

The food and drink processing sector is responsible for a further 1.7% of GVA, a further 2.2% of total employment and a quarter of Northern Ireland's manufacturing industry sales.⁴

Collectively, agriculture and the and drink food processing sector account for around 70,000 local jobs and 3.25% of Northern Ireland's GVA, which equates to £1.1bn at basic prices.⁵

There were 24,895 active farm businesses in Northern Ireland at June 2018 (a fall of 61 from 2017). The long-term trend in total farm numbers is generally downward and for the past 10 years the average annual change has been a decrease of about 0.4%. In 2018 total income from farming decreased by almost a quarter (23%) from £467 million in 2017 to £360 million. This decrease is largely attributable to a higher total cost for farm inputs (primarily feedstuffs).

3. Issues for consideration to inform further work:

- 3.1** Does this meet current understanding of the food system? What other key evidence/factors need to be considered?
- 3.2** What are the emerging opportunities and risk within the system?
- 3.3** What important interactions are there within the food system?
- 3.4** How can we address evidence gaps (waste and disposal, research and technology and imports)?

4. Next steps

Given the complexity of the food system, a systematic review and synthesis of evidence is likely to be a long-term project. The Committee are invited to consider the next steps it wishes to take, and/or areas of particular interest, to help inform this work going forward.

Annex A: Sources

1. [What is the food system?](#) (2019, City University Food Policy Unit).
2. [Agricultural & Horticultural Census in Northern Ireland, 2018](#) (DAERA, 2018)
3. [2018 Statistical Review of NI Agriculture](#) (DAERA, 2019)
4. [Report of the Northern Ireland Inquiry: Lay of the land](#) (FFCC, 2019)
5. [Northern Ireland's agri-food sector – background and possible 'Brexit' considerations](#) (NIA, 2016)
6. Food & Drink Sector Strategy 2019-2021 (Invest NI presentation given to FSA July 2019)
7. [Size and Performance of the Northern Ireland Food and Drinks Processing Sector 2017](#) (DAERA, 2019)
8. [Food and you wave 5 \(2018\): Northern Ireland](#) (FSA, 2019)
9. [Food in Northern Ireland: Current issues, programmes, concepts and initiatives](#) (environment link, 2010)
10. [National Diet and Nutrition Survey \(NDNS\) Report for Northern Ireland](#) (FSA, 2019)
11. [Northern Ireland Health Survey 17/18](#) (Department of Health, 2018)
12. [Towards a local food strategy](#) (Rural Network NI, 2015)
13. [Public attitudes tracker, wave 18 \(2019\)](#) (FSA, 2019)

Executive Summary

NIFAC Discussion – The Structure and Characteristics of the Food Retail, Wholesale and Production Sectors in Northern Ireland

This is the fourth of NIFAC's themed meetings to take place in the Committee's new way of considering issues and advising the FSA.

The theme of the meeting is 'The Structure and Characteristics of the Food, Retail, Wholesale and Production Sectors,' with the view to exploring and understanding the food system and structures in Northern Ireland. Given the nature and extent of the theme, the Committee will continue to explore this theme at the NIFAC meeting in January as well.

To provide background on each of the areas, the Committee will be hearing from a number of presenters. A presentation will be given from Conall Donnelly, Director of NIMEA, who will be looking at production and processing in the red meat industry in Northern Ireland. This will be followed by a presentation from Seamus Leheny, the Northern Ireland Policy Manager at the Freight Transport Association, who will be giving a presentation around the logistics and transport of food in Northern Ireland, including the movement of 'Just in Time foods', the processes involved, equipment and challenges ahead. Aodhán Connolly, Director of the Northern Ireland Retail Consortium, will be giving a presentation on the food retail landscape in Northern Ireland.

Rebecca Gillespie, FSA Principal Research Officer, and Michelle Patel, FSA Head of Social Science, will also be presenting a paper on the food landscape in Northern Ireland and will be joining the meeting via Skype.

Following the meeting, NIFAC will be visiting the Asda Regional Distribution Centre in Larne.

Members are invited to:

- Consider the content of the presentations and;
- Comment on and consider the characteristics and processes that work together to create the food landscape in Northern Ireland, the impact this has and any possible challenges ahead.

FSA Northern Ireland

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