Our Food 2022: Executive Summary

This report looks at whether UK food standards improved, declined or stayed the same in 2022.

Introduction and scope

At a glance

This report looks at whether UK food standards improved, declined or stayed the same in 2022. It is the second year Food Standards Agency (FSA) and Food Standards Scotland (FSS) have come together to produce this annual review.

When we launched Our Food, we outlined the types of standards the report may consider, which are:

1. **Food and feed safety (including allergen management)** – that is, ensuring the product is safe to consume, or, in the case of feed, safe for introduction into the food chain. A number of factors are taken into account when proposing safety standards, including advice from FSA and FSS risk assessors and wider experts as well as other aspects such as the principles that may determine consumer acceptability of risk.

2. **Other standards that support consumers and provide assurance –** this includes provenance and authenticity, production standards (for example, animal welfare and sustainability), composition and nutritional content, labelling and advertising of food, and other information that enables consumers to make informed choices based on the values that are important to them.

To answer these questions, the report draws on a range of evidence, including local authority data, government statistics, border checks notifications, and FSA and FSS's own sampling and surveillance activity. We explore this data from a UK-wide perspective, as well as breaking it down across the four home nations where it is meaningful to do so.

In this year's report, we look at these issues in four ways by:

1. **Examining the impact of the economic environment on consumer choice and behaviours:** this includes charting the potential effect that the cost of living crisis is having on people's ability to access a healthy and safe diet (see chapter 1).

2. **Looking at how the UK food system is influenced by international factors and at the safety of imported foods:** this includes the shifts in international trade patterns and the changing ways in which we manage the safety of the food we import (see chapter 2).

3. **Reviewing the current landscape of business compliance:** this looks at how hygiene standards have been maintained, according to the latest data, and whether enforcement authorities have the resource and capacity they need to cope with rising demands (see chapter 3).

4. **Assessing available evidence on the safety and authenticity of our food itself:** this draws on the intelligence gathered from FSA and FSS's food incidents notifications data, the national food safety and authenticity surveys carried out over this period, and the work of our two national food crime units (see chapter 4).

Key findings for 2022

2022 was a deeply challenging year for consumers. Food prices rose at a faster rate than inflation for much of the year and were accompanied by sharp increases in other household expenses, adding to the strain on people's finances. Overall spending on in-home food reduced by 6.9% in 2022 compared to 2021. Oils and spreads, dairy and alternatives, and fish, eggs, meat and other proteins experienced faster price rises than other Eatwell Guide food groups - all of them essential elements in many people's diets. FSA and FSS focus group research showed people across a wide range of income brackets were making compromises such as swapping out premium brands for budget ranges or eating out less in a bid to cut costs.

A record number of households – one in five across England, Wales and Northern Ireland – were classified as food insecure in 2022, meaning that their diet and/or food intake had been limited in some way due to their financial or personal circumstances. Similar evidence of increased food insecurity can be seen in Scottish data. A minority of people across the UK also reported cutting corners on food preparation and hygiene, including reducing their use of fridges and freezers or reducing the length of time they cooked their food, to reduce energy bills.

The global food system had to adapt to abrupt shifts in trading patterns as traditional supply lines were disrupted for some commodities. Though the available data from border checks does not indicate any shift in the safety of goods arriving from outside the EU, the UK has increased the number of high-risk foods now subject to enhanced checks at the border, partly in response to concerns about pesticide residues and other toxins in products from certain countries. As EU imports are not currently checked, we cannot comment authoritatively on the safety of goods arriving from the EU.

As we develop new trading partnerships, FSA and FSS will continue to advise government on whether new free trade agreements (FTAs) uphold statutory food safety protections. To support the public's interest in understanding the wider production values of imported food, FSA and FSS are also exploring how to address the lack of robust, international data on issues such as animal welfare and environmental and ethical production standards.

Although food businesses have also experienced sharp rises in their costs, the latest inspection data suggests this has not translated into any detectable reduction in compliance with food hygiene standards. Based on the latest inspection data as at the end of 2022, the vast majority of food businesses had met food hygiene standards at the point when they were last inspected.

Meanwhile the number of local authority inspections carried out returned to pre-COVID-19 pandemic levels in 2022. This is an important milestone, but it should be noted there were still approximately 39,500 unrated businesses at the end of 2022 across England, Wales and Northern Ireland. Adequate resourcing is vital for ensuring food hygiene rules are upheld, but the FSA's analysis of local authority staffing shows there are approximately 14% fewer food safety posts being funded across England, Wales and Northern Ireland compared to a decade ago – and even where these posts do exist, over 13% are vacant.

The situation in Scotland is more pronounced, where there are 25% fewer food safety posts than in 2016. There have also been reductions in food standards and food law officer posts across the UK, further challenging the ability of local authorities to carry out essential checks on food authenticity, composition and information standards. In 2022, both FSA and FSS had to take additional measures to address the ongoing resourcing challenges being faced by the veterinary profession – particularly in the recruitment of Official Veterinarians (OVs).

Analysis of reported food incidents and foodborne disease outbreaks, the results of national sampling programmes delivered by FSA, FSS and Defra, and the available intelligence on food crime do not suggest there has been any significant change in food safety and authenticity standards during 2022. However, we are concerned about ongoing breaches in food composition labelling in relation to allergens. To address this, further collaboration with local authorities and food businesses will be required.

Detailed chapter-by-chapter outline

This year's report is made up of four chapters, each focusing on a different factor affecting our food system in 2022 We have listed the key points from each of these below.

The nation's plate

Our first chapter explores whether food price inflation and other cost of living pressures may have affected consumer choice and behaviour. While it is not yet possible to provide detailed analysis of actual changes in our dietary intake during this period, we look at what the economic data reveals about the impact of inflation on different food types and what FSA and FSS consumer research tell us about the public's attitudes and perceptions of how financial pressure is affecting their relationship with food.

1. Food price inflation made a substantial contribution to the cost of living pressures affecting UK households. Data from the Office for National Statistics (ONS) shows food price rises averaged out at 11% over the course of 2022, with a year-on-year rise of 17% by the end of December 2022. This represents the biggest rise in the cost of our food since 1977. While every part of our shopping basket has been affected, our analysis of products in the Eatwell Guide categories shows that certain food types – including oils and spreads, dairy and alternatives, and fish, eggs, meat and other proteins – felt the sharpest rises. Foods high in fat, sugar and salt, as well as fruit and vegetables, experienced a lower rate of inflation than others.

2. Meanwhile the overall amount that consumers spent on food fell for the first time in a decade. The £8 billion (or 6.9%) reduction in our inhome food spend reported in 2022 compared to 2021 may partly reflect the increased spending during the pandemic, but it is also likely to be due to the strain on household food budgets caused by wider cost of living pressures. This is supported by evidence from FSA and FSS focus groups which reported that many people across a range of income brackets said they had been swapping out premium brands for cheaper alternatives or using budget retailers. Others also reported cutting down on perceived 'luxury' items like fresh meat and other fresh produce.

3. Food prices became the number one food issue of concern for UK consumers in 2022, according to FSA and FSS research. During the course of the year, around 41% of adults questioned in Scotland said they were worried about affording food compared to 25% in 2021 - while in England, Wales and Northern Ireland, the rate of public concern about food prices increased from 22% in 2021 to 34% in 2022.

4. One in five households (20%) in England, Wales and Northern Ireland were classified as food insecure in 2022 according to FSA research – the highest rate recorded since it began tracking in 2016. 10% of households were classified as having low food security, which means they reported eating reduced quality, variety or desirability of diet, but with little or no indication of reducing their food intake. A further 10% were classified as having very low food security, reporting multiple indications of disrupted eating patterns and reduced food intake. There was also an increase in the number of adults skipping meals and reducing portion sizes to save money across the UK. There is also evidence that some consumers have altered the way they store and cook their food in an effort to reduce costs.

Going global

This chapter describes where we are sourcing our food from by examining how the pattern of food imports changed during 2022. It looks at the latest available evidence from border checks and other safety notifications to examine whether the safety of imported food is being maintained. We also look ahead at the impact of new FTAs on our food system, and how we collectively build a more authoritative way of tracking and measuring imported food standards for the future.

1. Analysis of trade data shows there was a 5.6% increase in the volume of food imports into the UK compared to 2021 as global markets returned to normal after the COVID-19 pandemic. The amount of food the UK buys from other countries is now in line with the average seen over the past decade. There has been little change in the top 10 countries we source most food from, but greater volatility further down the list. There has been a notable drop in imports from Ukraine, Russia and certain Baltic countries and a sharp rise in imports from some South Eastern European countries, particularly Romania and Bulgaria.

2. Available data on compliance checks carried out at the border is restricted to imports from non-EU countries due to the continued absence of EU import controls. Data shows that there have been no significant changes in compliance failure rates in recent years. However, the UK now has responsibility for defining its own list of high-risk foods which are subject to more stringent controls, and has decided to increase checks on certain products in response to risks associated with pesticide use, contamination with mycotoxins and the rise in the presence of Salmonella in some parts of the world.

3. The UK has signed FTAs with Australia and New Zealand during 2022. FSA and FSS provided advice to the Government as part of Section 42 of the Agriculture Act 2020. In our response, we concluded that these agreements with Australia and New Zealand upheld statutory food safety protections for the consumer. For the New Zealand agreement, we also assessed whether it maintained statutory protections for nutrition and concluded that it did.

4. The FSA commissioned an expert report from the consultancy ADAS, looking at how it might identify and gather better information on imported food production standards. Although this underlined the lack of available data, we will continue to explore how it can meet the public's interest in this information, working in partnership with government and industry.

Keeping it clean

This chapter reviews the latest available data on food hygiene standards across a range of food and feed businesses. It looks at whether there have been any changes in food hygiene ratings for restaurants, cafés and other places that serve food, as well as the level of compliance in dairy, meat and animal feed establishments. In the wake of the COVID-19 pandemic, it also explores how effectively enforcement authorities have managed to restart their system of official controls and whether they have sufficient skilled resource and capacity to meet demand.

1. Data from the two national food hygiene rating schemes – the Food Hygiene Information Scheme (FHIS) and the Food Hygiene Rating Scheme (FHRS) – shows that the vast majority of food businesses had satisfactory or better hygiene standards based on inspection data as of 31 December 2022. Just over three-quarters (75.7%) of food businesses in England, Wales and Northern Ireland achieved a top rating of 5 for hygiene, while 2.9% of food establishments achieved a rating of 2 or below meaning they require improvement, major improvement, or urgent improvement. Across the whole of the UK, these figures show little or no change compared to the previous year.

2. Similarly, the available data on hygiene compliance in dairy establishments shows the vast majority in England, Wales and Northern Ireland continued to operate safely: 98.1% of farms and establishments in England and Wales, and 99.1% in Northern Ireland achieved satisfactory or good compliance levels. In Scotland, there is some evidence of the re-establishment of hygiene controls after the COVID-19 pandemic, with an increase in the number of inspections, guidance letters and instances of written advice being issued in 2021/22. No Hygiene Improvement Notices (HINs) were issued between April 2018 and March 2022.

3. Analysis of workforce data over the last decade shows that the number of food safety allocated posts[1] supported by local authorities in England, Wales and Northern Ireland has fallen by nearly 14% since 2011/12. Resourcing issues have been compounded by challenges in filling these roles, with approximately one in seven (13.7%) vacant. In Scotland, the shortage is more severe as the number of occupied food law posts fell by just over 25% compared to 2016/2017.

4. These reductions in local authority staffing also extend beyond food hygiene. There has been a 45.1% drop in the number of food standards officer allocated posts from 2011/12 to 2021/22 in England, Wales and Northern Ireland. A survey published in 2020[2] found that trading standards officer staffing levels fell between 30% and 50% across the UK between 2008/9 and 2018/19. It also found that just over half of the local authorities in the UK did not believe they had sufficient expertise to cover the full range of trading standards responsibilities, and that the ageing trading standards workforce was a threat to future professional capacity.

5. As the whole veterinary profession continues to face challenges in capacity, both FSA and FSS have felt the ongoing effects in the recruitment of OVs who oversee inspections in meat establishments – with a reported 27.4% fewer people joining the profession between 2019 and 2022 (RCVS, 2022), a notable increase in vets leaving the UK-practising category (RCVS, 2021) and a reluctance from veterinarians graduating from UK universities to take on public health roles. Recruitment from overseas remains an essential route, and this is supported through the option of Royal College of Veterinary Surgeons (RCVS) Temporary Registration. Both agencies are working to reduce reliance on temporary registration schemes as quickly as possible.

Safe and sound

The final chapter brings together data and intelligence collected by FSA and FSS to assess the safety and authenticity of the food we buy. It includes analysis of the food incidents data and foodborne disease outbreaks, the national food sampling surveys conducted across the UK, and the patterns of criminal investigations and ‘disruptions’ led by our two national food crime units to tackle fraud, adulteration and other types of criminal behaviour within the food chain

1. The total number of reported food incidents across the UK decreased slightly in 2022 compared to 2021 but remained broadly consistent with long-term trends. Meat and meat products continued to be the food category most often associated with food incidents. The leading cause of food incidents was pathogenic microorganisms, accounting for 29% of all UK cases. The number of incidents relating to undeclared or incorrectly declared allergens has returned to preCOVID-19 pandemic levels, following a decline in cases during 2020 and 2021.

2. The rate of most foodborne diseases reverted to pre-pandemic levels during 2022. However, reported cases of Shiga toxin-producing Escherichia coli O157:H7 (also known as STEC O157) reached their highest level since 2015, largely as a result of a major outbreak that was detected in the summer of 2022. The routine use of whole genome sequencing (WGS) is now helping public health authorities to identify more clusters of foodborne disease and has allowed the UK’s food safety and public health authorities to play a leading role in detecting domestic and global outbreaks.

3. There was no overall change in the combined number of Allergy Alerts issued by the UK’s food agencies in 2022 compared to the previous year. The reported increase (of 25%) in the number of Product Recall Information Notices (PRINs) is largely due to changes in how these figures have been collated this year, rather than any increase in overall number of notices being issued. Neither FSA nor FSS were required to issue a Food Alert for Action (FAFA) notice – the most serious category of food incident alert – in 2022.

4. FSA and FSS’s national sampling programmes play an important role in tracking areas of risk and vulnerability in our food system. The FSA’s targeted survey 2022 showed no statistical difference in the level of non-compliant results from previous years. Around a third of the failures

in testing related to labelling breaches. The findings also revealed further potential public safety issues relating to allergen declarations, reinforcing the continued need for regular checks by local authorities and businesses.

5. Sampling of oat and oat-based products within FSS's sampling programme did not detect unsafe toxins or heavy metals. However, there were instances of undeclared allergens in the free-from products tested, and a significant proportion (18%) of minced beef samples either had a higher fat content or a lower meat content than was declared on the packet. It should be emphasised that FSA and FSS surveys are targeted at areas of known risk and therefore carry a greater likelihood of identifying unsatisfactory results. They should not be seen as representative of overall UK food standards.

6. The two national food crime units carried out a range of investigations throughout 2022 in line with their respective strategies. In England, Wales and Northern Ireland, the National Food Crime Unit (NFCU) has been heavily focused on tackling threats in the red meat sector, the diversion of animal by products into the food chain, and pursuing suppliers of dangerous non-foods sold for consumption. In Scotland, the Scottish Food Crime and Incident Unit's (SFCIU) investigations under common law included a focus on suspected fraud in relation to counterfeit alcohol as well as traceability and adulteration in the meat supply chain and illegal slaughter.

7. Both the NFCU and SFCIU work closely with industry, local authorities and other enforcement agencies on other activities designed to disrupt or deter criminal behaviours. In England, Wales and Northern Ireland, a sizeable amount of the NFCU's disruptions included action against dangerous non-foods through the removal of the illegal dieting drug 2,4-Dinitrophenol (DNP) from online sale, as well as ongoing action against criminality in the red meat sector and the diversion of animal by-products into the food chain. In Scotland, a significant number of SFCIU-led disruptions similarly centred on criminality affecting meat and meat products. It also tackled fraud involving Scottish grown tea, confectionary and honey and made a series of unannounced visits with partners to pubs and other licensed venues to check for counterfeit products and deter any future criminal behaviour.

8. Both food crime units are closely monitoring the impact of price inflation, the legacy of the COVID-19 pandemic, environmental changes and the ongoing Ukraine conflict on criminal behaviour. No evidence was detected in food surveillance or sampling activity, or in the data made available via the Food Industry Intelligence Network (FIIN), to suggest there has been any increase in authenticity issues attributable to criminals responding to these big picture issues. However, it is recognised that the current economic conditions may present further opportunities for criminality within the food chain.

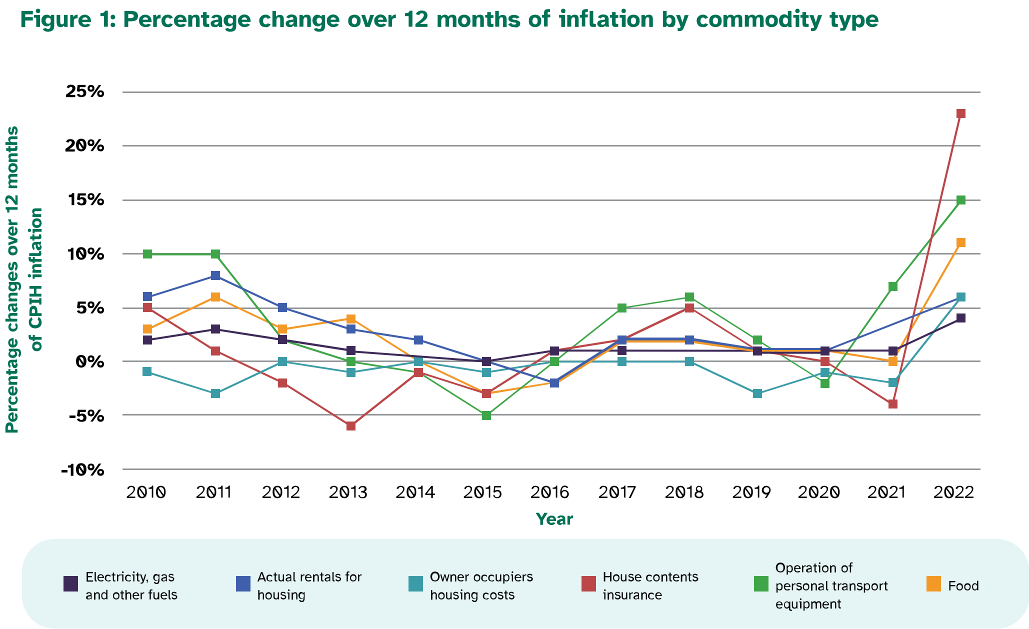
Setting this year's report in context

Just as it began to recover from the upheavals of the COVID-19 pandemic, our food system was hit with a further set of challenges in 2022. Rising prices, extreme weather, labour shortages, post-EU exit changes to UK trading relationships and border controls, and the war in Ukraine all created volatility and change, playing an important role in the story of our food in 2022.

Households in the UK faced increased prices across a wide range of goods and services, while incomes failed to keep up with the pace of increasing inflation. Between 2021 and 2022, electricity, gas and other fuel prices increased by 4%, house contents insurance by 23%, and operation of personal transport by 15%, summarised in figure 1.

Data from the ONS shows that food price rises averaged out at 11% over the course of 2022, with a year-on-year rise of 17% being reported by the end of December 2022. This represents the biggest rise in the cost of our food since 1977. As figure 2 shows, for the first half of the year, consumers experienced food inflation pressures similar to the overall rate of inflation, but the second half of the year saw food inflation rising much faster.

Figure 1: Percentage change over 12 months of inflation by commodity type



Source: [Consumer price inflation tables - Office for National Statistics]

Some of the drivers of food price inflation are summarised in figure 1 – yet the extent to which individual foods have been affected by these issues varies considerably, which helps to explain why some products experienced much sharper rises than others, as we will see in chapter 1.

For example, according to the Agriculture and Horticulture Development Board (footnote 1) (AHDB), milk prices have been sharply impacted by increases in farmer input costs and threats of milk shortages. The steep rises in margarine prices are likely to have been caused by a shortage of sunflower oil (due to the conflict in Ukraine), increased market demands (driven by increases in butter prices as a result of milk shortages), export restrictions on vegetable oils, bad weather conditions and increased demand by industry for biofuels as crude oil prices increased.

Egg producers, meanwhile, have suffered as a result of rising energy prices and costs of chicken feed, as well as an outbreak of avian influenza, which led to an egg shortage as some UK farmers were forced to cut production. Furthermore, 70% of the eggs we buy in the UK are free-range, but with only 13% of eggs in the EU produced in this way, the option to fill the gaps on UK supermarket shelves with imports was limited (footnote 2), driving the price up.

Figure 2: Percentage change over 12 months (2022) - Food inflation rates vs overall Consumer Prices Index including owner occupiers' housing costs (CPIH)

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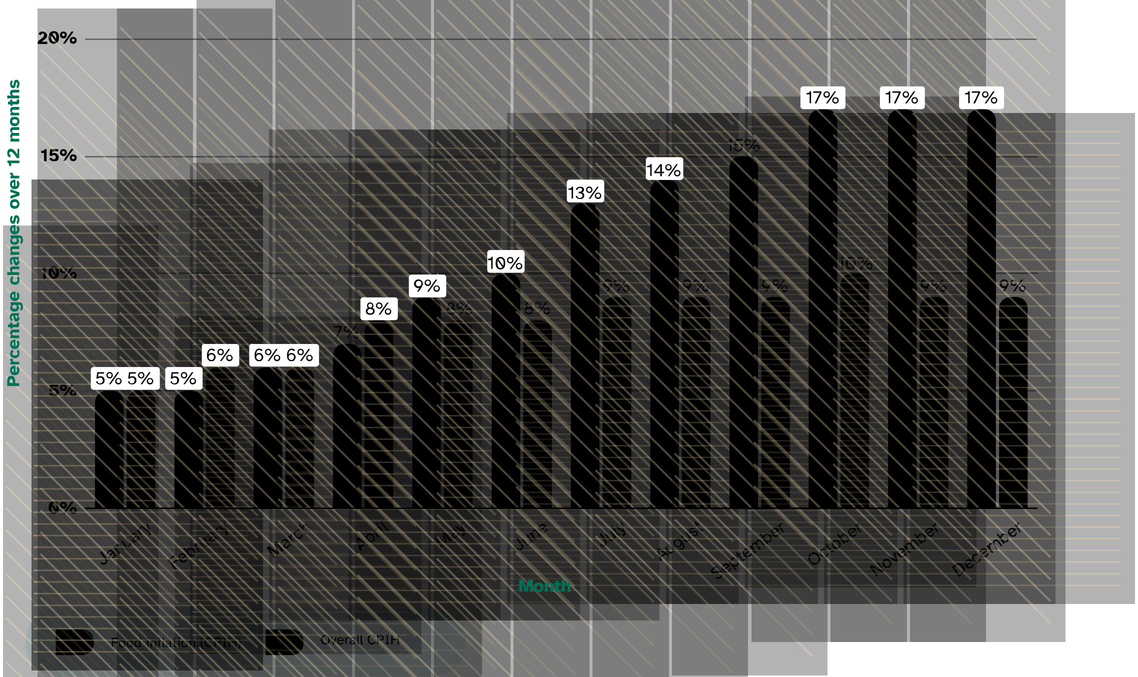

Source: [Consumer price inflation tables - Office for National Statistics]

An important theme running through this report is the Russian invasion of Ukraine, which contributed to big rises in energy costs in early 2022 and affected global access to vital commodities such as grain, cereals and cooking oils as military action prevented crops from being harvested while Black Sea blockades in the spring and summer of 2022 impeded international shipping routes. This has intensified the rises in production costs felt by UK businesses and contributed to some shifts in where we source our food from, as we discuss later in chapter 2 of this report.

Last year also saw several important milestones in the development of the UK's post-EU trading relationships, including the signing of FTAs with Australia and New Zealand, and the introduction of new pre-notification requirements for high-risk EU food and feed. However, there have been further delays in the introduction of import controls for EU food and feed, with the new Border Target Operating Model now due to take effect in 2024. The UK's departure from the EU has also had a material impact on the recruitment of key professionals involved in supporting food safety controls, including the supply of OVs (see p76).

Finally, although the last COVID-19 pandemic restrictions were lifted in February 2022, the disruptive effects of the pandemic continued to affect the food system throughout the year, not least in the resourcing and management of food hygiene controls. The efforts of local authorities and other food enforcement authorities in recovering the ground lost during the pandemic are documented in chapter 3 and reinforce the need to ensure adequate resourcing is in place to maintain effective consumer protections.

An overview of key factors influencing food prices in 2022

A range of factors have contributed to the changes in the cost and availability of our food, many of them associated with the war in Ukraine, the UK's departure from the EU, and the knock-on effects of the COVID-19 pandemic. These include:

Adverse weather

The UK experienced one of the hottest and driest summers on record in 2022, severely impacting domestic crop yields. The intense heat also affected harvests in parts of Europe, pushing up the cost of olive oil, vegetables such as cucumbers and parsnips, and some soft fruits.

Energy and transportation costs

Like UK households, food producers also experienced surges in their energy and fuel bills, making it more expensive to produce and transport food. As with the increases in other commodity prices, these costs were passed onto the consumer through higher prices.

Commodity prices

The price of key commodities for the food industry also rose steadily, adding to producers' costs. This included sharp increases in the cost of fertiliser, rapeseed and sunflower oil, and cereals such as wheat and maize – many of which were directly affected by Russian blockades of Ukrainian ports.

Labour shortages

The food industry has also been hit by labour shortages. UK farmers, for instance, faced a chronic shortage of seasonal workers during the summer of 2022, as nearly two thirds of all seasonal visas had previously been issued to Ukrainian workers.

1. Dairy market outlook, AHDB.

2. Britain's broken egg industry shows the price of food inflation, Reuters