



Policy Drivers Technical Note

Policy drivers refer to external and internal influences that shape a given sector through legislation. In the agricultural sector, this could be anything from public opinion to international movements that are likely to impact the sector and steer legislation. Importantly, policy drivers can result in changing practices and legislation from non-policy influences or can be born from policy decisions themselves.

Agriculture stakeholders in the UK are aware of the large-scale policy transitions that are currently taking place. This transition is largely being steered by the UK leaving the European Union (EU), creating an opportunity for the UK Government to realign the sector to independent objectives, as opposed to the EU's Common Agriculture Policy (CAP). The policy to replace the CAP is one that is self-reportedly climate-conscious, directly tying into net zero commitments. Subsidy payments are being swapped for payments tied to the creation of public goods, such as increasing biodiversity and restoring ecosystems.

Some drivers have a less tangible link to the current landscape, but are still vital to discussion, especially when understanding how policy sometimes conflicts with current market shocks and alternative priorities. Agricultural stakeholders are navigating an industry that is not only affected by UK government commitments such as independence and net zero commitments, but also has been seen to flex and react quickly to external shocks such as COVID-19, unprecedented rises in costs of production, the ever-increasing focus on the health crisis in the UK, and more recently food security concerns that have arisen from international conflict such as the war in Ukraine.

It is these factors that have largely contributed to and shaped current and future policy that we may expect, such as the Agriculture Act 2020, Government Food Strategy, and Environmental Land Management Schemes to name a few.

How has international policy and commitments shaped UK agriculture policy?

There are three main ways in which international legislation drives the UK agriculture sector: (1) international commitments that steer national objectives, such as Sustainable Development Goals; (2) International legislation that has guided the sector so far, such as the EU's CAP; and (3) trade agreements and the policy of key trading partners and competitors.

Sustainable Development Goals and Net Zero Commitments

The UN Sustainable Development Goals, particularly the Post 2015 Agenda, saw world leaders pledge common action across a broad and universal policy agenda, including a global pursuit to sustainability within agriculture which thereby created a need to nationally underpin through policy and legislation.

Goal Two has particular importance within the sector and alludes to the increasing pressure to both tackle food availability issues whilst protecting the environment. Goal Two has the objective of ending hunger, achieving food security, and improving nutrition. In the same breath it also stresses the objective to do this whilst promoting sustainable agriculture through resilient agricultural practices and increased productivity, whilst maintaining ecosystem health and progressively improving land and soil quality¹. Whilst the UK is not so vulnerable when it comes to food security or arguably food availability, there are still important discussions to be had over how to best utilise land in a balanced way that prioritises both food security and ecosystems.

Since 2015, the UK Government and devolved governments have set a plethora of policy which alludes to the direction and balance of land use, whilst contributing to emission reduction and other environmental objectives which directly feeds into the SDGs among other international commitments. The Environment Act 2021, for example, has commitments to the environment as legally binding, holding the Government accountable if these should not be met².

COP26

The 2021 Conference of Parties held in Glasgow (COP 26) increased the pace and urgency of delivery to meet the collective goal of limiting warming to 1.5 degrees by finalising the Glasgow Climate Pact 2021³. This pact focuses on (1) mitigation through setting new 2030 emissions targets; (2) adaptation through pledging finance into driving aid in this field; (3) finance through mobilising some \$100 billion in climate finance; and lastly, (4) promoting collaboration through finalising a common reporting of emissions to aid transparency. Importantly, this pact also encompasses the agreements to end deforestation by 2030.

Why is 1.5 degrees so important?

Whilst incremental climate change imposes risks and threats to our current system, global warming above 1.5 degrees has been widely agreed to have exponential negative impacts comparatively, particularly due to reaching 'tipping points' where damage to natural regulation systems and ecosystems, such as our forests, oceans, and ice, cause irreversible damage.



COP27

The 27th United Nations Climate Change Conference (COP27) in Sharm el-Sheikh, Egypt, continued with efforts to mitigate the effects of climate change. Progress towards significantly reducing greenhouse gas emissions was limited in comparison to previous COP meetings; however, some major breakthroughs were made.

The Sharm el-Sheikh Implementation Plan⁴ summarising key decisions made over the week, included agreement on 'Loss and Damage', which will provide financial support for communities who have faced the worst impacts of climate change to adapt and rebuild.

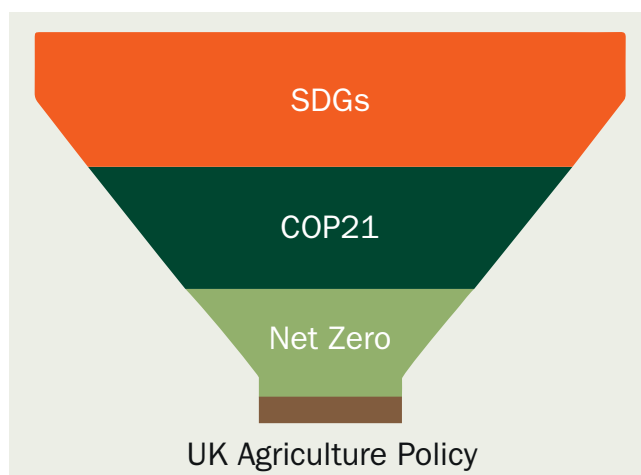
Recognition of the unique potential of agriculture to tackle climate change continued with the renewal of the Koronivia Joint Work on Agriculture, which following 'more meeting time than any other item at COP27', agreed the 'Joint work on implementation of climate action on agriculture and food security'⁵. On the first-ever day dedicated solely to agriculture at a COP, the 'Food and Agriculture for Sustainable Transformation' (FAST) initiative was launched. FAST aims to improve the quantity and quality of climate finance contributions to transform agriculture and food systems by boosting access to investment, increasing knowledge, and providing policy support and dialogue⁶.

It will be some time before we see exactly how COP27 commitments filter through to impact domestic agricultural policy, although historically the trickle-down effect from the UK's participation in international initiatives has created the need for national strategies such as the Net Zero Commitment.

COP 15

The agreement to halt and reverse biodiversity loss by the end of the decade at the COP15 UN Biodiversity Conference matched the urgency declared towards climate change within COP21's Paris Agreement. The UK, alongside nearly 200 other countries, signed the Kunming-Montreal Global Biodiversity Framework (also known as the '30 by 30' deal) to protect at least 30% of Earth's ecosystems by 2030.

Achieving ambitious targets such as halving excess nutrients, pesticide risk and food waste by 2030 will undoubtedly shape the direction of UK agricultural strategy and funding over the course of the decade. Nature-based solutions that address both biodiversity loss and climate change through 'sustainable management of agriculture' offer a key strategy for farmers and land managers to maintain, enhance and restore ecosystems across the 71% of the UK's land stock covered by agriculture, whilst contributing to the net zero pathway.



The Influence of the European Union

EU policy has largely governed the national agriculture sector for more than 50 years, before the UK's departure, creating an undeniable influence on the current UK agricultural landscape. This is especially important when understanding current trading partners.

The Common Agriculture Policy was launched to support farmers and improve productivity, safeguard farmers, promote jobs within the agri-food industry, and latterly help tackle the climate crisis¹. This policy shaped the landscape of agriculture in the UK in many ways, but notably through providing subsidies to farmers as long as they were compliant with various regulations or codes of good practice. Being able to move away from EU governance, in general, was one of the driving forces for Brexit. The UK has since published its Agricultural Transition, which makes a stark contrast from subsidising farmers for food production, to the Environmental Land Management Schemes which incentivises the generation of public goods. This move is also being echoed among the EU, whereby CAP reforms are being negotiated in 2023, and is set to be more devolved through National Strategic Plans and will work towards the objectives of the EU's Green Deal Objectives⁷.

National Policy Landscape

The UK's national agriculture policy is being steered by a few key drivers, namely environmental pressure from both international commitments and the public, as well as larger system shocks such as Brexit. Whilst frameworks such as the Net Zero Strategy (2021) and the Agriculture Transition have more long-term goals, more immediate initiatives that support these objectives are being enacted through legislation such as the Agriculture Act 2020 and Environment Act 2021. Whilst these items of legislation aim to increase transparency for the future of the sector, current farmers and new entrants understandably may feel more on edge due to the transitional nature of the industry at present.

The main objectives of the landscape as a whole, as broken down by each policy below, is to:

- maintain and increase food security;
- address the climate crisis and enhance the preservation of ecosystems;
- ensure high animal health and welfare standards;
- set a precedence for trading standards;
- address the relationship that the agriculture sector can play when addressing UK health issues.

UK Net Zero Strategy 2021

The UK's Net Zero Strategy 2021 is very obviously driven by international and domestic pressure to respond to the climate crisis. The commitments within this document directly influence agricultural stakeholders by highlighting the pressure for land use to prioritise biodiversity objectives.

In response to Section 14 of the Climate Change Act 2008 (which enacted a Duty to report on proposals and policies for meeting carbon emission budgets⁸), the UK Government formulated the Net Zero Strategy to close the gap between business as usual and 2050 net zero emission targets. For the agricultural sector this is particularly significant as the paper deems it to be one of the hardest sectors to decarbonise. It is, however, the commercial sector that operates most closely with the environment. For these reasons, it can be expected that environmental objectives will play an increasingly important part in the sector in the future.

Not only are initiatives focusing on increasing biodiversity and reducing impacts of the local environment, the Strategy mentions that innovation is expected to play an important role in reducing emissions. This is namely through the Farming Innovation Programme as well as more specific research and grant schemes. Residual emissions are still to be expected, but this strategy highlights the national expectations of the sector to largely decarbonise going forward.

Key UK Net Zero Strategy (2021) Commitments



- 75% of farmers in England to be engaged in low carbon practices by 2030 and 85% by 2035
- This initiative is expected to be realised through the Environmental Land Management Scheme
- Increased investment into the Farming Innovation Programme to support innovating emission reduction technologies
- Woodland creation rates to treble by 2025
- 35,000 hectares of peat in England to be restored by 2025 and 280,000 by 2050. Scotland holds a similar target for some 250,000 hectares of peatland to be restored by 2030 with Wales looking to restore 600–800 hectares of peatland restoration per year⁹

The Path to Sustainable Farming: An Agricultural Transition Plan 2021–2024

The Agricultural Transition Plan was constructed by the Department for Environment, Food, and Rural Affairs (DEFRA) in response to Brexit, in order to replace the EU's Common Agriculture Policy. In doing so, DEFRA have been able to clearly state the direction in which they intend the sector to follow, focusing largely on maintaining production whilst combating reported habitat loss and ultimately, supporting the objectives of the UK's Net Zero Pathway.

The Agricultural Transition Plan highlights four main strategies aimed at achieving these environmental objectives which ensure that UK farms can be profitable and economically sustainable without subsidy:

- Replace the Basic Payment Scheme with the Environment Land Management Scheme (ELMs) which places greater focus on the generation of public goods through the Sustainable Farming Incentive, Countryside Stewardship Plus and Landscape Recovery
- Financially support innovation and investment into upgrading infrastructure and applying new technologies such as slurry stores and precision farming equipment
- Evolve direct payments by removing EU greening rules, two-year spend requirements, and bureaucratic tape to make the process more streamlined
- Improve the transparency of information across the supply chain through regulation of legal requirements¹⁰

If these objectives are realised, the sector may enjoy enhanced innovation and investment in a sector which is marked by less red tape and complexity.

The Transition Plan is supported further through two important legislative documents that have been released, The Agriculture Act 2020 and Environment Act 2021. These Acts particularly highlight a key example of how the green movement in a post-Brexit era can potentially shape the day-to-day operations and objectives of the agricultural industry, and give a key insight into the longevity of which these green initiatives may be of focus within the UK.

Agriculture Act 2020

The Agriculture Act 2020¹¹ focuses on many different themes which can largely be categorised within animal welfare, environment, and trade.

The UK has long celebrated high standards of animal welfare within livestock production which has an important selling point to key supply chains and clients. The Agriculture Act is a key legislative piece that formalises the movement towards animal welfare; this is highlighted in both the Agricultural Transition, and the Animal Health and Welfare Pathway which is set to launch in 2022. Animal welfare is legislatively prioritised through the Act and will be subsequently built upon through the 2022 Animal Health and Welfare Pathway through a variety of initiatives including enhancing standards through increasing the traceability of livestock products. This also alludes to the importance of high welfare standards to the end-user, not to mention the farmer themselves.

What is the Animal Health and Welfare Pathway 2022 and how might it affect my farm?

The Pathway hopes to achieve four main objectives:

1. Support farmers towards achieving higher welfare practices and systems
2. Improve biosecurity to eradicate bovine tuberculosis by 2038
3. Focus on tackling the anti-microbial resistance problem
4. Reduce greenhouse gas emissions to support the Net Zero Strategy and 25 Year Environment Plan

What might this mean for different livestock producers?



The Better Chicken Commitment highlights the need for slower growing breeds, stocking densities, and restricts the use of thinning birds.



Increases focus on transitioning out of cages, identify and fix root causes of feather pecking, and reduce fractures through improving bone health.



Enhanced biosecurity measures, reducing sow confinement, and identify and fix root causes of tail biting to reduce tail docking practices.



Tackle Bovine Viral Diarrhoea, reduce lameness and mastitis, upgrade housing to improve ventilation and comfort, reduce pain associated with disbudding, dehorning and castration, and enhance pastures⁹.



Targeted health screening of parasites, mastitis, lameness and other 'iceberg' diseases. Focus on improving body condition and pain management during procedures.

In addition to animal welfare objectives, the Agriculture Act formalises the transition from the Basic Payment Scheme to the Environment Land Management Scheme. Scotland and Wales are to develop their own policy in this regard.

Finally, the Agriculture Act established the Trade and Agriculture Commission who has a duty to report on food security every three years to Parliament¹². This established committee highlights the importance placed on maintaining and increasing the focus on food security in the UK in an environment where competition for land use is ever increasing between development, food production, and biodiversity objectives. The Commission's reports are likely to ignite specific responses in critical areas as and when they arise which are likely to somewhat impact the agriculture sector and influence food production. The link between external shocks and food security in the UK can be demonstrated by the recent rise in livestock feed and fertiliser costs which have been linked to the conflict in Ukraine.

What is missing from the Agriculture Act 2020?

Key gaps in the Act have been thought to raise some vulnerabilities for UK farmers. Whilst powers were established for the transparency of animal welfare to increase, few or no protectionist measures were established to protect the UK's animal welfare standards which could be damaged by new trade deals such as pesticide and antibiotic use for instance, as well as genetically modified crops, and beef production linked with deforestation. Secondly, many of the measures in the Act are 'powers' and not 'duties' which inherently come with less accountability. Some analysts were expecting a similar strategy to the EU's Farm to Fork Strategy, which tries to encompass the food chain within environmental goals. This unfortunately was not realised or touched upon in the Act¹⁰.

Environment Act 2021

The Environment Act was passed through Parliament after the Agriculture Act and intuitively holds a wider environmental focus, however, similarly this came about from the necessity to replace EU legislation. The Act encompasses various objectives such as waste and recycling, clean air, nature conservation, and water use and has particular implications for the agriculture sector in the following ways:



Biodiversity

Linked wildlife corridors, new forests, and unlimited fines for the illegal felling of trees are to take place both through direct initiatives and Sustainable Farming Incentives. Local authorities will be creating biodiversity reports every five years to understand progress towards these objectives.

An increased legal standing will be given to Biodiversity Net Gain and potentially carbon sequestration opportunities, through Conservation Covenant agreements. This is particularly important for many within the sector who are awaiting more clarity and structure to assess the opportunities on their existing land. Furthermore, this Act commits to tackling deforestation through restricting the use of products that are produced illegally according to the laws of the producing country, however, does not do the same for products that legally contribute to deforestation.



Air Quality

New air quality permits are to be applied to the beef and dairy sector, similar to those applied within the intensive pig and poultry sector. This is expected to come into place via the updated Environmental Permitting Regulations.

Total reductions are to be expected in the boundaries of particulate matter in ambient air which is particularly linked to the agriculture sector.



Water

The Environment Agency is now able to revoke and amend abstraction licences without liability or compensation. Additionally, no licence is required if only 20 m³ of water is taken from a relevant water source. Higher charges are set for higher rates of abstraction, however the EA reports that the agricultural sector will still see a price cut of 13.4% on average¹³.



Waste and Waste Crime

New single-use plastic charges may cause additional costs for the use of on-farm plastics such as silage wrap and crop cover.

Long-awaited measures are to be put in place to aid local authorities in tackling waste crime².

Government Food Strategy 2022

Key drivers of policy so far have specifically focused on the climate crisis, Brexit, and food security to a certain extent. The Government Food Strategy addresses these concerns, but contextualises them within the theme of the UK health crisis and builds upon food security objectives, more so than has been addressed so far. It is important to note that food policy is devolved, however the strategy recognises that food production operates on a UK-wide basis.

Some of the main objectives of the strategy are as follows:

- Food production should be maintained, whilst sustainably boosting sectors which are expected to have trade advantages
- Ensure pay, employment, and productivity through skills-based training increases
- Combat childhood obesity through increasing the proportion of healthier food sold
- Reduce greenhouse gas emissions and environmental impacts of the food system through net zero and biodiversity initiatives
- Achieve one trillion pounds worth of exports annually by 2030, specifically taking advantage of new trade agreements
- Areas of focus for initiatives in order to achieve these objectives are broad, however importantly address many of the key shocks and difficulties that farmers have been experiencing in the sector in recent years

Labour

Plans to increase the number of visas available to seasonal workers, such as in the poultry market, and to work with the Migration Advisory Committee to update the Shortage Occupation List.

Access to Innovation

£270 million has been set aside to fund the Farming Innovation Programme up to 2029, with the aims of utilising innovative technologies to achieve a plethora of objectives. So far, these innovations include alternative proteins and gene editing as well as a call for evidence for the use of feed additives to reduce livestock methane emissions.

Food Transparency

The Food Data Transparency Partnership will be launched to report on key sustainability and animal welfare metrics, providing more information to customers but inherently needing up to date information from the supply chain.

Trade Agreements

Some sectors, namely horticulture and seafood (seaweed), are being thought of as opportunities for global export growth. Trade Agreements are also being meticulously watched to ensure that the animal and health standards are matched or prioritised, however this brings larger issues when operating fairly under the World Trade Organisation¹¹.

Key aspects of the Government Food Strategy 2022.

What are the key policy drivers?

Various policy drivers have been present when exploring the current political agricultural landscape and legislation. The main drivers so far have been identified as the Green Movement, Brexit, animal welfare, food security and health. Whilst some drivers have been gaining momentum gradually, others such as Brexit and food security have been altered and enhanced through external influences such as the COVID-19 pandemic.

The Green Movement and Net Zero Commitments

The Green Movement has already had a substantial effect on the agricultural sector, from carbon footprinting initiatives to the increased focus on environmental land use options. The influence not only comes through legislative bodies, but through supply chain and public pressure that has had a large effect on demand.

Some systems are further ahead than others in respect to understanding on-farm emissions, such as dairy for example, which ultimately has been down to supply chain incentives and pressures. Other sectors may expect a similar pathway to occur as retailers become more focused on understanding scope 3 emissions, and the public become more interested in understanding what food products are linked to lower emissions. This will be especially important given the globalised nature of the sector, where many other competitors that match welfare standards are more versed in understanding farm-level emissions.

One of the reasons that the agriculture sector is so driven by the Green Movement is not only due to the proven global and local environmental impacts of farming, i.e. from ammonia emissions to eutrophication, but also due to the inextricable link between agriculture and the environment itself and subsequent land use trade-offs. Because of this interaction, agricultural stakeholders are uniquely placed to be able to focus on mitigation measures and land use or sequestration opportunities. Arguably, no other commercial industry works more closely with the environment, creating the option for the Government to largely place agriculture at the centre of biodiversity and rewilding objectives through strategies such as ELMs.

One barrier that may hinder the impact of the Green Movement as an important policy driver is shocks to the UK that may place other drivers, such as food security, as a higher priority. This may be similar to the dramatic changes in food demand due to the pandemic for instance, or could be more long term such as the climate crisis. Potential future effects of climate change are likely to exacerbate land use trade-offs as the productivity of land and availability of water changes in response. How stakeholders should respond to both climate pressures and food demand alike is likely to be an important question for many, often prompting the discussion between 'land sharing' (integration of environmental initiatives within agricultural parcels) and 'land sparing' (distinct agricultural and biodiversity separation). This trade-off is exacerbated further through the development of government-led initiatives that incentivise rewilding and other biodiversity promoting initiatives.

What impact did the pandemic have on the agriculture sector?



- Demand switched from hospitality to food retailers. This was both by government guidance and due to increased home-cooking, as well as stockpilers. Retailers were forced to reorganise on a massive scale to deal with increased demand whilst balancing supply.
- Changes in demand for products quickly shifted and left gluts and scarcity of various products. Milk and potatoes saw a reduced demand due to fewer people eating in restaurants and cafes. Demand for mince soared whilst expensive cuts of meat decreased.
- Many farmers also lost supplementary income whether that might be in smaller scale markets or other income streams such as bed and breakfast and camping opportunities¹².

Brexit and Labour Shortages

The impact on the UK from leaving the European Union has created a surge in agricultural policy and trade agreements which will all contribute to shaping the agriculture sector going forward. The initial impacts of Brexit have impacted the sector in numerous ways that legislation has arguably not responded to yet, however it may do so in the future.

Labour Shortages

The sector has seen a huge drop in the number of immigrant workers post-Brexit that are vital to the agricultural industry. This has been further exacerbated in recent years due to the complexities of travelling over the COVID-19 pandemic. In 2015, just one year before the Brexit referendum was signed, 20% of the workforce were EU nationals¹⁴. The House of Commons reported a labour shortage in the food and farming sector that totals some 500,000 vacancies of 4.1 million roles¹². The UK pig sector has been particularly hit, with some 30,000 pigs having to be culled on farm as a result of abattoirs running under capacity due to labour shortages¹⁵.

Reported Impacts of Labour Shortages on the Agriculture Sector in 2021



- 24% of daffodil crop left unpicked
- 10% of cucumber growers didn't grow a second crop
- A scale back of 5–10% of the poultry sector due to 6,000 out of a required 40,000-person workforce not being available

The Government responded to the crisis through temporary short-term visas under the Seasonal Workers Pilot which many unfortunately regarded as too late for many stakeholders to take full advantage of. The uptake of these visas in 2021 was marginal, with only 32%, 14%, and 3% of poultry, pork butcher, and heavy goods vehicle visas respectively being applied for out of the total number of visas available. The lack of uptake was partially due to the very limited periods of time that workers were allowed to stay in the UK¹⁴.

Trade

The future of international trade has been of increased concern for UK agriculture and food stakeholders through the uncertainty created by Brexit. It has been exacerbated by increased demands for national food security through the COVID-19 pandemic and even more so as a result of the impact of the war in Ukraine.

Many current concerns revolve around what trade agreement negotiations will mean for UK farmers regarding competition from other countries, who may have different welfare standards, lower carbon footprints, and ultimately could be more competitive on price. Despite the duty and tariff free access to the EU-27, the ongoing trade friction with the rest of the EU for UK exports and the unresolved nature of this, has been seen to be another major area of concern and frustration for UK farming and food producers.

With regards to the trade friction issues, UK exporters are facing more paperwork and longer processing times in exporting products to the EU than before, which is not being mirrored on imports into the UK. Despite this, as of 2022, export trade to the continent has almost regained parity with pre-Brexit levels, providing a testament to non-legislative trade drivers such as established trading connections and a continued demand for high quality UK products such as salmon, whisky, meat and dairy.

The UK government has been negotiating agreements with various countries and regions such as the US, the Oceania countries, Japan, and the Gulf, including preliminary talks with India and then the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) which consist of Canada, Malaysia, Vietnam, Singapore, New Zealand and Peru among others. The attraction of a deal with the CPTPP is assumedly the access to some 500 million consumers which is comparative to the EU-27 market.

The importance of these alternative trading factors, as John Giles, Divisional Director of Agri-Food at Promar International, states, is key when assessing the impact of trade agreements, and importantly, the impact of Brexit as a policy driver on the UK agricultural sector. Although new trade agreements might legislatively 'open up' new markets, there are important factors to consider in regard to export development, including:

- the established relationships with existing suppliers,
- developing an understanding of how the market concerned really operates,
- understanding how non-tariff barriers operate,
- building a real appetite to do business in these markets and seeing them as the future priority.

This is particularly important when speculating whether the UK's negotiations will increase competition from countries with different and/or lower animal welfare and product standards or approaches to production. When considering the US, the issue of chlorinated chicken, genetically modified soybean crops fruits and vegetables produced with higher tolerances of pesticides and hormone-treated beef are particular concerns for farmers, consumers, processors and retailers alike.

Common recent trends in international agri-food trade globally have been towards increased trade liberalisation, recently demonstrated by Australia and India's recently signed free trade agreement which has followed 10 years of discussion. As we have seen however, there is also an increased focus on securing domestic national food objectives given recent external shocks such as the pandemic, and the movement towards low carbon initiatives.

The overall drive from the UK to establish more trade agreements does however suggest a movement towards new markets, by which agricultural stakeholders may feel an increased pressure to compete in, under different conditions to that experienced within the EU. This volatility is likely to be mitigated somewhat however due to existing trade factors such as established import export relationships.

Animal Health and Welfare

Animal Health and Welfare is an important component when discussing policy drivers, as the topic cuts across many discussions in the sector, namely trade advantages, competition, and inclusion within larger agricultural and environmental objectives. In regards to trade, the UK's higher standards of animal welfare in comparison to many countries provides a competitive advantage, but only to markets where customers are prepared to pay slightly more for these standards. The importance of animal health in a trade context therefore, is linked to Brexit due to the threat of the UK market being opened up to potentially lower-priced suppliers with lower legislative standards.

The National Food Strategy outlines some key comparisons that highlight the practice in the UK to import goods that have standards that would be regarded as illegal if domestically raised:

- Danish bacon which uses sow stalls, banned in the UK in 1999 due to it being regarded as a cruel practice
- Chicken stocking densities of 42 kg/m² in the EU in comparison to 39 kg/m² in the UK
- The import of oilseed rape grown from neonicotinoid-coated seeds, which were banned across the EU in 2013¹¹

These examples have highlighted the requirement for legislative guidelines in trade agreements on the animal standards expected for imported products¹⁷.

The effects of this driver on UK agricultural legislation and trade agreements are likely to become more visible as more light is shed on the UK's progress in trade discussions and negotiations. It is also important to remember the pride that UK farmers and the UK in general holds when prioritising animal health and welfare standards and what the implications may or may not be on a global stage going forward. It can however be an arguably safe conclusion that welfare standards will not drastically alter in the near future, especially alluded by the Government's Animal Health and Welfare Pathway 2022¹⁸.

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