

What is the UK Food Sector?

- Contribution of the Food Chain to the UK economy **£110bn** GVA in 2015
- Food manufacturing is the biggest manufacturing sector in the UK, with GVA of **£26.9bn** (c**17%** of total manufacturing)
- The sector brings **16,000** new products to market (FDF estimate), and invests **£1 billion** in innovation each year.
- In 2014 it employed **3.8 million** people, **14%** of the workforce
- We all rely on its products every day

Critical National Infrastructure

- Food is one of 13 UK Critical National Infrastructure sectors. Defra also manages the water sector. Food has no individually critical enterprises, but has strong dependency on other sectors. We produce an annual sector security and resilience plan which sets out risks to the sector and action to mitigate
- Government works with industry to identify, manage and mitigate these risks (both Natural Hazards and Threats) through groups such as the Food Chain Emergency Liaison Group.
- Government conducts research and provides good practice guidance into risks and vulnerabilities to support industry to build its own resilience
- Recently this has included a study of resilience of supply chains to east coast port disruption and PAS 96 on protecting food and drink from malicious threat, and the 2015 Food Stocks Survey

Risk and Interdependencies

Risk based approach focuses on two types of risk to UK Food Supply chains, based on dependency on transport (road and maritime), energy (including fuel) and increasingly IT:

- a. Disruption to domestic distribution from energy, transport or telecommunications e.g. widespread loss of electricity, or fuel supply, cyber attack
- b. Disruption to international supplies to the UK e.g. disruption to maritime supply routes or sea ports from tidal surge or other natural hazards

Conclusion

1. Food is a large and diverse sector
2. The UK food chain has strength in depth and variety; the resilience is in the industry
3. However food supply is critically dependent on other Critical National Infrastructure sectors such as transport, energy and communications