

# Future scenarios for the UK food system

A toolkit for thinking ahead



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Wendy Schultz



**FOOD  
ETHICS**  
COUNCIL

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A toolkit for thinking ahead

Printed on chlorine free 100% post-consumer recycled paper.

Published March 2009

ISBN 978-0-9549218-4-2



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# Contents

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Summary	5
Introduction	8
Creating the scenarios	10
The scenarios: an overview	13
The scenarios in detail	16
Scenario 1: Pass the VatBeef™ QuikNoodle	18
Excercise: Future-proofing	25
Scenario 2: Carry on consuming	27
Excercise: Identifying the challenges	33
Scenario 3: Cash rich, time poor, experience hungry	35
Excercise: Creating a vision	41
Scenario 4: A lot of allotments	42
Conclusions: What building the scenarios told us	48
The Food Ethics Council	50
Acknowledgements	52
Relevant publications	53
Other reports in this series	54

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# Summary

## Future scenarios for the UK food system: A toolkit for thinking ahead

**The only certainty about the future is that it won't turn out as we expect. Even our best projections are likely to be wrong. But people and organisations striving for a fair and sustainable food system are aiming for long-term ambitions, not only short-term goals. So how can we plan ahead wisely in a world that is bound to surprise us?**

**We believe that using future 'scenarios' – sets of different but equally plausible stories about how the future could turn out, based on expert analysis of current and emerging trends – can help to identify key challenges, test out policies, products and campaigns, and think more clearly about our aspirations for the future.**

**In this report we set out four scenarios for the future of UK food in 2022:**

### Pass the VatBeef™ QuikNoodle

**All the latest technology, including biotech, in-vitro meat and milk and hyper-efficient closed loop recycling systems are brought to bear on growing problems of nutrition and hunger in the UK. Cost and convenience are key consumer priorities, with general disdain shown towards any pretension around food – as long as it's safe and filling, who really cares where it comes from, unless it carried a heavy toll in carbon credits?**

#### Carry on consuming

Personalisation and segmentation are key. An explosion of brands sees ever tighter targeting of products at smaller and smaller groups, including the widespread marketing of nutraceuticals and functional foods. Supply chains are dominated by a handful of companies, but global competition and the demands of CSR policies on carbon and food safety have led to greater reliance on production and processing within the Europe+ region.

#### Cash rich, time poor, experience hungry

Enter a world of seemingly limitless choice, gourmet bragging and web-based recommendations and retail. Only those with the luxury of time to spare can personally track down the most exclusive eco-friendly purchases, or chat with the artisanal producers now gaining increasing power in the food system.

Still, the vast majority of people benefit from automatically ordered, cleverly managed doorstep deliveries. Concern about 'quality' food – low-input, traceable, fairly produced – is generally high, even if knowledge about whether the system is really that low-carbon is limited.

#### A lot of allotments

Food growing has penetrated and surrounded the urban jungle. With multi-storey farms and a widespread commitment to growing your own (wherever there's a space), people's understanding of where their food comes from hasn't been higher in generations. Food is a key part of the social and cultural – as well as physical – fabric of towns and cities.

High street retail is back in vogue and localism is a dominant theme, with the biggest retail and foodservice companies turning their attention to larger markets and margins elsewhere in the world.

As full of paradox as the present, the scenarios may both inspire and frustrate. In any case, we hope they provoke you to think about the

challenges you or your organisation may face in years to come. We have included three exercises to help you use the scenarios to test the robustness of your current strategies in the face of uncertainty, identify challenges ahead, and to work out what actions are required to move towards the best possible future for food.

This report is designed to be used as a stand-alone toolkit, but by way of conclusion we also share what we learned from working with the finished products as part of our own project on food distribution.

# Introduction

We can't predict the future at the best of times. Right now, with instability in the economy, geopolitics and the biosphere all looming large, this uncertainty seems particularly threatening.

Yet the need to plan for a sustainable, ethical food system has never been greater. Improving food security, tackling hunger, obesity and injustice, supporting animal welfare, and preserving the environment, all demand urgent action in pursuit of long-term aims.

How can people striving for a better food system – civil society groups, public policymakers and businesses – begin to plan campaigns, policies or products for the future if it looks so uncertain? And how can we avoid the opposite trap, of assuming that the future will be like today, only more so?

This is where scenarios can help our thinking. Businesses such as Shell, and the UK government through its Foresight programme, use scenarios to help them think creatively about future threats and opportunities and to avoid the danger of assuming that the future will be much like the present.

We developed a set of four scenarios to help us think about how the UK's food system could develop over the next couple of decades. What might we be eating in 2022, and why? Where could it have come from? Where might we be eating it – and how might it get there?

We want to share these scenarios because we found them useful and we believe others may too. We also know how much effort and time it takes to develop scenarios such as these – not just our own but also that of the people from across the food sector who contributed to a series of three workshops. We, in turn, have taken part in other organisations' scenario processes and appreciate the commitment it entails. We believe that a toolkit such as this can make many of the benefits of scenarios accessible to other organisations at a minimal cost to themselves and to their stakeholders.

Our scenarios are not predictions or projections. Instead they represent four plausible stories about how the future could turn out, based on current trends and factors likely to drive change, as well as on significant uncertainties about how they are likely to play out. None of the scenarios is likely to 'come true', but elements in each may well do.

We can use these scenarios to ask 'what if...?' questions, to help us 'future-proof' our strategies: 'if the world turns out like this, will our policy still work or be a priority?' Scenarios can also help us think about desirability of certain futures: 'if that happened, would our food system be better or worse for people, animals and the environment? And what do we need to do to encourage or avoid it from happening?'

These scenarios formed part of the evidence for our project on food distribution. The project report, 'Food distribution: an ethical agenda', examines the impact of food distribution networks on our environment, economy, culture and communities, and their contribution to climate change. It offers a sustainable vision for the future of food distribution, and provides a roadmap for government, business and civil society to get us there. It is available on our website at [www.foodethicscouncil.org](http://www.foodethicscouncil.org).

The workshops which we used to develop these scenarios took place before the full impact of the current financial crisis was evident. The current recession may well throw up new trends that were unclear at the time, render others less significant or change the pace at which some of these trends unfold. Nonetheless, we believe that the scenarios described here still provide an extremely useful and thought-provoking tool for considering the future of our food system.

In this report, we explain our methodology, before presenting the scenarios themselves along with suggestions for how you can use them to help with your own thinking. The report concludes with some observations on the most striking lessons we at the Food Ethics Council drew from the scenarios.

# Creating the scenarios

Creating scenarios is not an exact science – and the results are not supposed to be forecasts or projections, but plausible possibilities. Scenario-building relies on using a clear process to channel knowledge and expertise from a diverse range of sources.

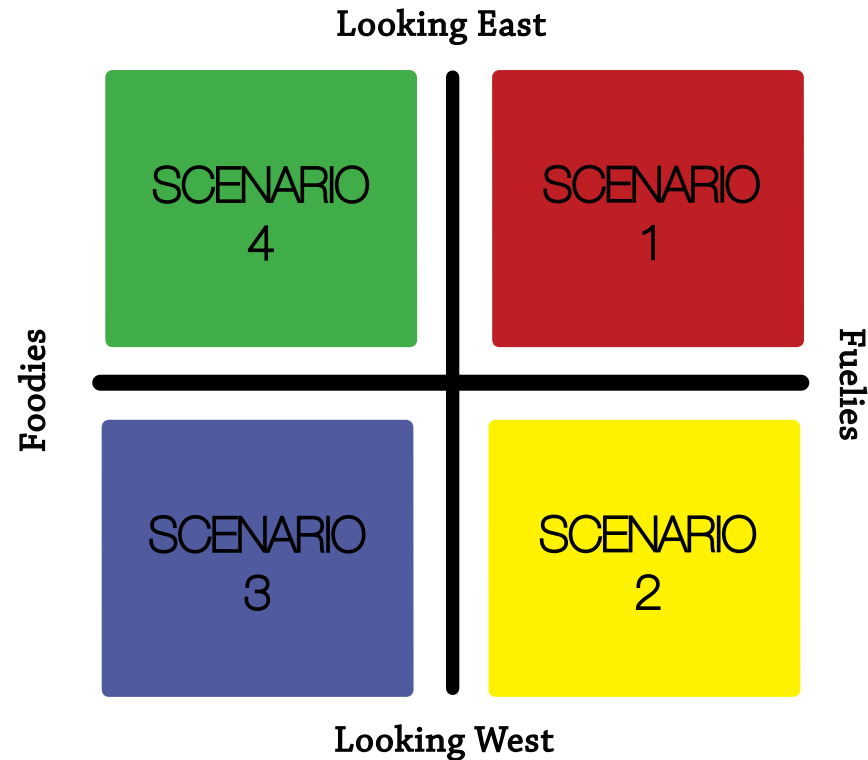
We created our scenarios through extensive desk research and interviews, and a series of three creative, facilitated workshops, with experts drawn from industry, government agencies and civil society.

From desk research and interviews with experts we built a longlist of possible trends and drivers of change that might shape the future to 2022. In some cases these were already strong whereas, in others, only ‘weak signals’ of emerging trends were detectable.

By grouping together similar trends and drivers we arrived at a shortlist, which we took to our first workshop. At this event, through deliberation and debate, participants further grouped trends and drivers into ‘clusters’ of trends that might combine to drive change in a particular direction. The clusters were then ranked in terms of their importance (how significantly they are likely to effect change into the future) and uncertainty (how sure we can be about the direction of travel that particular drivers will take).

Through a process of consensus-building, two drivers of change, agreed to be both highly important and highly uncertain, were selected to act as the framework for our scenarios. By placing these drivers (the shift of global

political, cultural and economic influence from West to East; the role of food in UK society) along perpendicular axes, we created four 'spaces' in which our scenarios could play out:



Each quadrant has a different pair of dominating drivers, which affect how other trends are likely to develop, resulting in four different scenarios. Over subsequent workshops we fleshed out the detail of the scenarios, considering how our set of trends and drivers might play out differently in each quadrant.

Guided by the extensive input from the workshops, we wrote the scenario narratives that follow.

## The scenarios: an overview

The diagram on the next page illustrates the key characteristics of each scenario and the differences between them. The scenarios are structured around two important uncertainties:

1. in 2022, will the dominant UK culture and food system treat food primarily as fuel to keep us going or as a way, not only of gaining nutrition, but also of expressing deeply held values?; and
2. by 2022 will China, India and other rapidly growing economies have eclipsed 'the West' as we know it, to become the dominant economic, political and cultural powers, or will the current global powers still be stronger, albeit waning?

## 'LOOKING

Chinese, Indian, and other Asian markets  
Western markets, with a corresponding

## EAST'

gain considerably in strength compared to  
shift in focus of global supply chains

### A LOT OF ALLOTMENTS

- **Emphasis:** 'enough' food, not excess - resources low, aesthetics high
- **Values:** sustainability, quality
- **Locus of trust:** user-controlled production
- **System structure:** Short supply chains
- **Non-market exchange alongside retail diversity**
- **Consumers seek out seeds and plant cuttings**
- **Concerns:** sustainable local production and supply

SCENARIO 4

*Era of the gourmet gardener*

### PASS THE VATBEEF™ QUIKNOODLE

- **Emphasis:** European food security
- **Values:** security of supply
- **Locus of trust:** EU regional and regulated food industry
- **System structure:** EU supply chains, top-down decision-making
- **Increased use of GM and in-vitro protein technologies**
- **Consumers watch their carbon credits**
- **Concerns:** continued supply from European food producers

SCENARIO 1

*Era of extruded foods*

### *Era of the gourmet chef*

- **Emphasis:** food diversity
- **Values:** ethics, expression, experience
- **Locus of trust:** personal relationships with producers, recommendations from trusted friends
- **System structure:** global, reliant on IT and social networks
- **The 'Amazon grocery' for most, with high-end farmers' markets for luxury experience**
- **Consumers collect source links**
- **Concerns:** consumer time pressures

SCENARIO 3

CASH RICH, TIME POOR, EXPERIENCE HUNGRY

### *Era of the personal brand*

- **Emphasis:** consumer segmentation
- **Values:** novelty, personalisation, food safety
- **Locus of trust:** brands
- **System structure:** global supply chains, top-down decision making, though in transition to a more regional model
- **Functional foods**
- **Consumers see food shopping as a necessary evil**
- **Concerns:** multiple pressures on production

SCENARIO 2

CARRY ON CONSUMING

## 'LOOKING

Western Europe maintains its economic  
accelerating Asian economic growth

## WEST'

strength and global market clout vis-à-vis



# The scenarios: the detail

robust strategies for the future. The exercises are designed primarily for groups; one of the main strengths of scenarios is their ability to encourage dialogue and to uncover differing perspectives.<sup>1</sup>

On the following pages the four scenarios - Pass the VatBeef™, QuikNoodle, Carry on consuming, Cash poor, time rich, experience hungry, and A lot of allotments - are portrayed in greater detail.

Each scenario is depicted over three pages, with a mixture of straightforward factual description, articles and quotes from the future.

It is important to immerse yourself in the details of each scenario without dwelling on the idea that 'this will never happen': the scenarios are plausible possibilities to help us think, not predictions, but they have a coherent internal logic, developed from the trends of today.

If the question of plausibility continues to trouble you, consider the dramatic changes that we have witnessed in the UK food system over the last 15 years and how far-fetched they would have seemed. Then try sitting down with a bundle of recent newspapers and magazines, and look for articles that point to one or more of the trends embodied in the scenarios. You might be surprised how many you find!

Between each scenario is an exercise to try out. These are designed to help readers use the scenarios to test their thinking and develop

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<sup>1</sup> The exercises draw on the existing work of others, including: Foresight Horizon Scanning Centre (2008) *Exploring the future: Tools for strategic thinking* Foresight HSC; Waverley Management Consultants for the Department for Transport (2007) *Scenario planning toolkit* DfT; JISC InfoNet (2008) *Tools & techniques: scenario planning* Online at [www.jiscinfonet.ac.uk/tools/scenario-planning](http://www.jiscinfonet.ac.uk/tools/scenario-planning).

# Scenario 1

## Pass the VatBeef™ QuikNoodle

The UK of 'Pass the VatBeef™ QuikNoodle' is one where ensuring that everyone gets sufficient nutrition is of rising concern. Fortunately, for the time being, high-tech manufacturing and processing methods have filled the emerging hunger gap, and proved profitable for those in the business. Production is highly industrialised, especially in the creation of protein; 'real' meat and milk are produced in the UK in only small quantities and fetch high prices from a small group of consumers who claim that they "taste better, are healthier and are a crucial link with the 'natural' world".

Food businesses – like those across the economy – are both exceptionally resource efficient and highly innovative, with new biotechnologies, recycling and reusing materials and minimising energy consumption deeply embedded into industry practice. Carbon concern is built into everyday practices too, with personal carbon credits spent and saved. As a consequence, the very worst visions of a world ravaged by climate change envisaged at the start of the century have not materialised.

International trade is considerably down on its high point at the beginning of the century, with rising tensions between global power blocs. As a result it is a high political priority to produce high levels of bulk commodities to provide nutritional basics within Europe, including the UK.

Consumers are keen on 'pile 'em high' discount stores, focusing on fewer

lines with limited segmentation. Marketing focuses less on the qualities of the food per se (the era of 'food porn' is long gone), and instead focuses on the values of the brand, much as cigarette or petrol advertising used to do. 'Value' rules over luxuries, though convenience in storage and preparation are seen as essential elements of 'basic' foods.

Convenience is the watchword when eating out too – 'event dining' is rare. Works canteens are on the rise as people seek to get a quick, decent, but unexceptional lunch in a hurry. Most people aren't too fussed about 'cheffy nonsense'.

The state takes a proactive role in guaranteeing the food supply – not least to avoid the rice riots seen elsewhere. Uptake of school meals is high – it's one less thing for parents to worry about, given the strict nutritional standards which are achieved through careful fortification and processing off-site, which also cuts down waste.

## Hunger for change?

European Union President Maciejowski is a man under pressure. Demands from Euro anti-poverty campaigners and Grey Power traditionalists grew this week for a further rise in bio-ag production subsidies and guaranteed EU market prices, as food security topped the bill at a tense EU-China/India Association summit. Yet with the explosive growth in the eastern Superbloc's appetite for food and fuel continuing unabated for a second decade, it is difficult to see how the rising trend in hunger and malnutrition among the West's poorest can be stemmed, as key commodities are in short supply or fetch eye-watering prices.

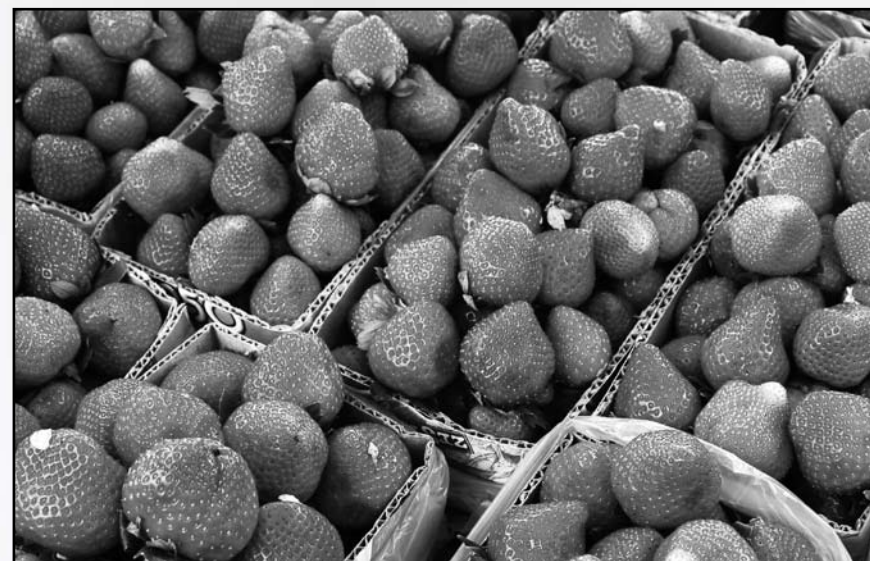
Eastern politicians have offered 'technological assistance' in the form of new GM crops and industrial production techniques. But with GM widely established across Europe, and 'steak-in-a-vat' processes for pharming artificial

milk and meat already taking well over half the market for protein production, the offer is seen as little more than political rhetoric. The rapid spread of these technologies – often developed by Western scientists who have moved East in large numbers – has in any case needed little political encouragement, driven by the high cost of inputs to traditional farming, and moves to tackle carbon emissions from Hi-C processes like livestock production. It's extraordinary to think that extravagant, luxury dishes like roast beef were relatively common not very long ago.

And climate change has been another source of tension at the summit. With ChIndiAn leaders taking a more bullish stance, the global Collaborative undertaking on Climate (Cut-C) agreement driven through by US President Obama in 2010 in the twilight of American diplomatic power looks to be under

threat. If Cut-C is binned, as a relic of the old multilateral world, then all this could go. The booming lifecycle analysis (LifeCyc) sector could collapse – and with it, our neurotic carbon-watching. How this would play out more widely is anyone's guess. Will we go 'back to the future', each household driving several miles in an individually-owned car to fill up with a weekly shop at a supermarket, rather than hoarding our carbon credits for something more fun? Will we see the resurgence of the cooker at the expense of the microwave?

Our food currently comes from wherever is cheapest – in both cash and carbon terms. Things are far less exotically sourced than they used to be – with global prices booming, it's only the EU's production subsidies that are keeping prices bearable. And that means EU produce for much of what we eat.



The heady days of air-freighted strawberries in January seem a world away.

The LifeCyc revolution has shown how it isn't always the item that's produced closest that is Low-C – and put paid to the fad so prevalent a decade ago for 'localness'. In any case, much of that was really identity politics – now that we're all MySpaced, where you or your potatoes come from doesn't really matter. That's why we still import some products that none of us could do without. But with carbon 'hotspots' in the supply chain

tackled – especially in production and packaging – there has been a greater trend towards seasonal consumption, and a drift towards shorter distance travel for products. The heady days of air-freighted strawberries in January seem a world away.

Regardless of the future for the Cut-C treaty, we're certainly unlikely to lose our re-engineered, cradle-to-grave production systems. The writing

was on the wall when the last English landfill closed in 2013, 2 years after China said it was unwilling to take any more of our waste. Given the efficiencies we now have in keeping materials flowing round the production system, it is jaw-dropping to think of how spectacularly wasteful we once were.

For now we must sit back and await developments at the negotiations. ■

## Meet the people:

"We're not just a convenience – we're a public service, ensuring the availability of nutritious meals."

**Geoffrey, canteen manager**

"My mum collected Nectar points – I collect carbon credits: they have a *much* higher resale value!"

**Francis, shopper**

"I'm encouraging clients to source regionally more than globally, and emphasise their on-line business."

**Alison, food retail consultant**

"New logistics businesses are extending to the consumer's car – a horizontal expansion into carbon management technology and software systems."

**Robin, logistics entrepreneur**

"We've simply integrated our production chain with QuikNoodle, extruding from vats straight into packs. It's nutritious, tasty and exceptional value."

**Victoria, CEO, processing firm**

"I'm one of the last of the old breed – a proper, 'mixed' farmer. I know we've got problems an' all that, but I just can't get my head round this fake stuff. Still, I take a real pride in the quality of my stock – and I can't complain about the money..."

**John, Farmer**



New  
MacDonald  
has a  
pharm...

Last box of air  
freighted  
strawberries  
unloaded

ON  
STRIKE

UNITE

Tensions  
build as  
European  
AgSubsidies  
rise for  
5<sup>th</sup>  
straight  
year

## Exercise: Future-proofing

This exercise is designed to help groups of people test out current goals, strategies policies, campaigns or products and to see how robust they are. Will they still be relevant if the future doesn't turn out as expected? Could they be modified to cope with a wider range of possible futures?

1. Together, read pages 18-49 to ensure that you understand what the scenarios are about and where they have come from.
2. Split into four smaller groups, each taking one scenario. Each group should read the three pages describing their scenario and discuss what the strengths, weaknesses, opportunities and threats of that situation would be for an organisation like yours.
3. Come back together and discuss your current strategic goals and tactics. What are your current aims? What campaigns or policies are you planning? What new products or services are you hoping to launch?
4. With these in mind, go back into your break-out groups. Each group should consider how your current objectives would fare if their scenario were to come true. Would your current or planned activities still be relevant and robust? Would they have been overtaken by events? Could they be altered, so as to be more effective?
5. Come back together for a final plenary session and share your findings. Discuss what the findings mean. Are there common themes, risks or opportunities? Do some of your plans fare well or badly across several scenarios? Is it possible to rethink your current objectives to make them more robust and effective in the light of what you have learned?

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# Scenario 2

## Carry on consuming

Efficiency, segmentation, and convenience are the watchwords in the world of 'carry on consuming'. Food is fun, quick and easy, not a source of existential angst.

Food can be extra good for you – at least, according to the claims for widespread 'clever' processed foods that apparently boost your health. There is a wealth of functional foods for every health concern under the sun, and burgeoning product ranges and brands are tightly targeted at ever smaller demographic and income groups. For all that, obesity is on the rise.

This is great for the vanishingly small number of conglomerates responsible for this multiplicity of brands, with vertical integration up and down the supply chain even more extreme than it was at the start of the century. Total supply chain control has been an important way for leading brands to satisfy consumer concerns about product safety.

While niche branding and value-added processing might be mainstream in the UK market, so is super-efficiency, driven in the main by corporate responsibility initiatives. This has driven down refrigeration use, with new ambient preservation technologies a key innovation of recent years. It has also ensured that meat and dairy production is intensive, but lower-impact in environmental terms than it was in 2007.

Carbon concerns have had increasing purchase on the popular imagination as the effects have become more evident. This has enabled a somewhat reluctant backpeddling from some of the most extreme examples of hyperglobalisation seen previously, with more regionalised supply networks, using the leanest, just-in-time methods. UK production is particularly geared around bulk commodities, transformed into a multitude of alternatives through processing wizardry.

With wild fish available in vanishingly small quantities, farming of plant-eating fish is widespread. Tilapia ponds, warmed by the output from CHP plants in factories or on farm, are widespread.

Eating out isn't a big deal. It's just a bit part in a fun day out – the focus is on cafés and eateries integrated with retail or leisure experiences. Choice and private sector efficiency also find expression in public sector catering; hospitals and prisons feature contracted out food courts.

For those not at Her Majesty's Pleasure, regular home delivery helps out people with little time to spare.

## Times of Transition

*Live Today mag: from our database to your mobile PDA – 12 June 2022*

Until recently, the UK's food supply was one of the most globalised in the world. 'Our' multinationals built up effective global supply chains to bring us high-quality foodstuff at low prices in increasing variety from all around the world. We've come to rely on trusted brands, in conjunction with light touch government regulations, to ensure the safety of that food.

Yet the last five years have seen the vice of resource constraints close ever more tightly – driven in part by pressure from the developing economies which have finally come good on their promises of global influence, after many false starts.

In addition, the big food companies have increasingly sought to respond to the realities of production in a rapidly changing climate and to public nervousness about what will happen next. Our global supply chains increased their carbon efficiency, but could only go so far.

Of late and in response to these multiple pressures, we have seen the beginnings of a transition away from the most global supply chains to a more regional focus in the Europe+ zone. The UK horticulture industry has boomed, and the warmer climate will help maintain that at relatively low levels of energy input. With land in desperately short supply, in part because of the market for 3rd-gen biofuels, some insiders say we're likely to go further in the future, intensifying food production in the UK countryside at a loss of recreational space.

What does this mean for the consumer? Apparently little change, says the industry. The unreliability of 'seasonality' has been banished through the extraordinary innovations in food technology seen over the last decade to extend fridge-free preservation times. Steady growth in gene-tailored diet foods is predicted. And the sheer variety of products that manufacturers have brought us is unlikely to decline.

It could be in the home where we'll see the biggest changes over the next few years. Eco campaigners say that we'll need to reduce the energy drain in our kitchens: better ambient storage will help, and more flats and residences will feature 'capsule kitchens' – basic spaces for minimal food prep – perhaps with communal building kitchen spaces.

For now though it seems like business as usual.

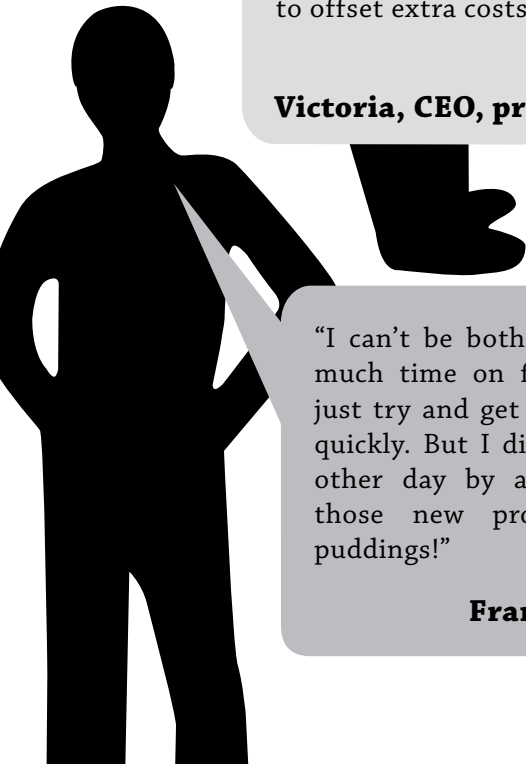


## Meet the people:



"It's been a grim decade. With the CAP scrapped, and no subsidies, local farmers are simply small cogs in global agri-corporation machines. Suicide rates among farmers have doubled."

**John, Farmer**



"We've renewed our contracts with firms in Eastern Europe. Our focus remains on reliability and value, and local costs are still low enough to offset extra costs of transport."

**Victoria, CEO, processing firm**

"I can't be bothered spending too much time on food shopping – I just try and get the ordering done quickly. But I did get tempted the other day by a special offer on those new pro-codimal vitality puddings!"

**Francis, shopper**

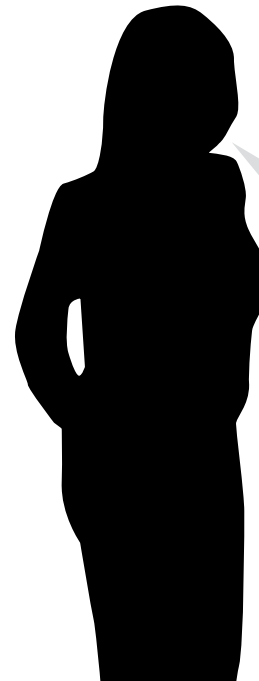


"The costs of maintaining global supply chains are skyrocketing. It's not just the rising costs of fuel – we're trying to address that by converting the fleet to biodiesel, ethanol mixes, even some electric trucks. It's also the cost of monitoring all parts of a global supply chain to the standards of purity and safety demanded by UK consumers."

**Robin, logistics entrepreneur**

"Fast foods and mid-range franchise restaurants are doing really well – people like to grab stuff on the go!"

**Geoffrey, franchisee**



"Targeting and personalisation, plus value, value, value, that's my message. Tailor your offer to the individual – right down to the results of their GeneScan™."

**Alison, food retail consultant**



# BUSINESS NEWS

## SHOP MORE, WORRY LESS: THE NEW CONSUMER MANIFESTO?

Lose that fridge: use ambient storage and save watts  
Oil prices continued to rise at an unprecedented pace as oil climbed another \$2 per barrel yesterday.  
As market

# The Journal

Sunday 12 June, 2022

## The QuikMeal for forty-something, stressed-out dads with a genetic predisposition to heart disease!

'So it seems we now have a choice'

It ereituisi exercip eraestio od tatunmy nonulla commolor sim nullumam henisi.

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### Exercise: Identifying challenges

To help

This exercise is designed to help you identify emerging challenges for your organisation.

In a group, read pages 18-49 to ensure that you understand what the scenarios are about and where they have come from.

Taking the first scenario, discuss what the strengths, weaknesses, opportunities and threats of that situation would be for a number of different stakeholders for an organisation like yours. For each stakeholder, consider what they would like you to be doing to maintain or improve the situation; what policies would they be seeking; what products would they be demanding; what campaigns would they be backing?

Then consider your own organisation in the present. What could or should you be doing now to ensure that your future stakeholders would be happy, if the first scenario were to come true?

Repeat steps 2 and 3 for each of the remaining scenarios.

Compare your results from all four scenarios. Look for challenges which appear across several of them, and ones which only arises for specific scenarios.

Where issues arise across several scenarios, you should consider the implications for your work in the immediate future; do you need to start planning a new campaign or investigating a new policy?

Hold onto to your scenario-specific challenges. As time goes by, keep a watch out for signals of trends from each of the scenarios emerging; it is likely that in reality there will be elements from each. Consider whether any of the conditions for your scenario-specific challenges are starting to arise and adjust your activities accordingly.

# Scenario 3

## Cash rich, time poor, experience hungry

With the UK economy booming once more and the foodie revolution in overdrive, the 'cash rich, time poor, experience hungry' world is one of seemingly limitless choice, gourmet bragging and web-based recommendations and retail.

Lower-input, supposedly environmentally-benign production is widely seen as desirable, even if that sometimes reflects a 'lifestyle choice' rather than any strictly scientific benefits. And, for the majority, it would be pretty difficult to find the time to investigate the ethical credentials of products; staying ahead in the race for 'global competitiveness' has costs too. Most people rely on intelligent kitchens and smart, automatic i-ordering, which takes account of social network recommendations, to ensure they have good food in.

Not that they need to stay too stocked, since eating out for (speedy) pleasure is common, with restaurants burnishing their traceability and provenance credentials.

If most rely on the quality of the software – and the tastes of their friends – to ensure their kitchens are stocked, for those with the time, it has become a particular badge of status to buy products 'directly' from artisanal producers. Immersive videocasting allows customers to build relationships with small-scale olive growers, whether in Kent or overseas, and even for people to select 'their own' tree, for uniqueness.

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From OurDaily Online  
June 12, 2022

## 'Naughty nuggets': the teen rebels fighting back on food



Naughty Nuggeteers at work

©Lisa pics

"Screw authenticity!" was the message on the hacked cyberbanner splashed across the homepage of many a food producer's website late last Wednesday. The e-graffiti is the latest attack by a group calling itself the 'Naughty Nuggeteers', a mainly teenaged network who say that they are sick of today's prevailing food culture with its emphasis on consumer-producer relationships and sensory experience.

The teens are reacting against the last decade's transformation of Britain's food landscape, which has seen small, artisanal production return to the fore in a twin revolution of technology and consumer values. The all-pervading nature of today's Web 3.0 has effectively turned producers across the country and the globe into direct suppliers to English, Welsh and Scottish consumers, with literally millions of products from growers and processors available in the virtual MarketSpaces. Where once we browsed the supermarket shelves, now our AIAs (ArtifIntellAgents), organise and make sense of this multitude of options for us, and in many cases order on our behalf, their selections driven by requests from fridge sensors - and recommendations from our Friend's Lists on social networking sites, such as Facejournal.

Page 1 of 2

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Know enough about the food on your plate? ... dig deeper

The Food Ethics Council is the independent national advisory body working on the ethics of food and farming for the public benefit, both in the UK and globally. Our aim is to create a food system that is fairer and healthier for people and the environment, and where social justice and ecological sustainability are the norm, not the exception.

**FOOD ETHICS COUNCIL** [www.foodethicscouncil.org](http://www.foodethicscouncil.org)

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It's easy to forget quite how dominant the giants of 'physical' retail once were; the megastores of ASDA-WalMart and Sainsbury's, now essentially convenience store brand fronts for the likes of Amazon and logistics conglomerate DHL, were formerly weekly destinations for shoppers. With the meteoric rise of online delivery, and with shoppers increasingly wanting to receive goods directly from a multitude of producers in a single delivery, the logistics operators were well-placed to step out from the shadow of the giant retailers, neatly side-stepping growing concern about 'shopping miles' into the bargain.

In the early phases of these changes food commentators feared that our increasingly cash-rich, time-poor society was going to completely sever the relationship between consumers and producers, and leave us with little concern for either taste or the hidden envirosocial costs of food production. In fact, the opposite has proved true. With our shopping choices so dependent on what others suggest – and so open to scrutiny by our friends – perhaps it was inevitable that we now place greater emphasis on gourmet tastes and our relationships with specialist producers. Indeed, for the celebocracy with the time, cultivating a personal relationship with one's own guava farmer – or even dedicated tree – has become a badge of status, and the experience of the farmers' market remains the domain of only the most fashionable.

The world really is our fairly-traded, organic, heritage-variety oyster in terms of the variety of products we can get and where we can get them from. That said, with the impact of climate change appearing on our newsfeeds everyday, it's generally seen as rather vulgar – not to mention outrageously pricey – to be receiving air-freighted produce on a weekly basis.

For the Nuggeteers, who have grown up as eco-experientialism has gone from niche to mainstream, it's enough to make them choke. Skyping on conditions of anonymity, one Nuggeteer said yesterday, "we're tired of a 'lifestyle' being literally rammed down our throats – we've had enough of the System and we're saying 'free the Twizzlers'" – a reference to the fatty, highly-processed 'meatshapes', commonly eaten in schools before most of these teens were even born.

Page 2 of 2

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## Meet the people:

"I raise lambs to order – you can specify feed, butcher date, everything – even check their growth via webcam. Customers love the sense of ownership."

**John, Farmer**

"Dining is no longer pre-theatre: it IS the theatre. A narrative arc for the senses. Comedy, tragedy, drama – I create it all with food."

**Geoffrey, 3-star Michelin chef**

"The Amazon model has gutted retail groceries. My advice? Focus on convenience and quick errands: create the 21st century small general store."

**Alison, food retail consultant**

"We ARE the retailer these days – everyone's ordering both bulk and specialty items on-line. People only go to shops for small, immediate needs."

**Robin,  
logistics entrepreneur**

"My choices are my identity; I want to feel personally connected to the people who produce my ingredients – I constantly upgrade my source list with an eye on social and environmental responsibility as well as quality and innovation."

**Francis, shopper**

"Last year a Japanese chef designed new cut patterns for our line of pre-prepared vegetables. This year, we're expanding into service: chefs in your home."

**Victoria,  
CEO, processing firm**



http://www.newswebonline.co.uk/scenario3:cash rich, time poor, experience hungry/today/news/

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Sunday June 12, 2022

GLOBAL EDITION SWITCH TO UK EDITION

## Latest: Chef creates week-long Wagneresque 'Ring Cycle' of meals: only 36 seats available

©Nic Laureford



Today sees the start of an audacious attempt by Celebrity chef Jami Forager to create the oral equivalent of Wagner's ring cycle. With only 36 places available, the five starred Michelin chef's menu is

▶ As it happens  
▶ ANALYSIS

### Mergers on the increase between farmers' co-op and logistics giant to feed demand for 'own-name' ingredients

©Angus Mackie



Farmers' co-operative GreenLand has confirmed merger plans with logistics giant Nutri-Con. Paul Jackson, arable farmer and Chair of GreenLand called the move a bold step in the provision of low-cost

▶ UPDATED  
▶ INFORMATION

### My AIA had a craving! Software glitch delivers entire output of Tuscan olive grove to flat in Sheffield.

A taste for all things Mediterranean left civil servant David Hunt reeling after coming home to a delivery of 360kg of olives and 2,000 litres of cold pressed olive oil.

Blog

## Exercise: Creating a vision

The four scenarios depicted here hopefully each contain some elements which you and your organisation may find appealing and some which are problematic. This exercise is designed to help you produce an additional, preferred scenario - a vision of a future that describes how you would like things to turn out. This can aid you in working out the strategies you need to help make your vision more likely to become reality.

By drawing on content from the existing scenarios, rather than starting with a blank piece of paper, your vision is anchored in observable trends and possibilities, rather than being a wholly unrealistic wishlist.

In a group, read pages 18-49 to ensure that you understand what the scenarios are about and where they have come from.

Discuss and identify which scenario is closest to the one that you would like to see.

Sketch out a new, fifth scenario, which improves on the scenario identified in step 2, by building on its strengths; overcoming its weaknesses; and drawing on positive elements from other scenarios.

Having set out this vision for the future, you can work backwards from your vision to the present day to work out what your organisation can do to help turn the vision into a reality. You can also identify what others will need to do - and the necessary sequence of these actions. This is known as 'backcasting' (forecasting backwards from the future).

# Scenario 4

## A lot of allotments

‘A lot of allotments’ sees a strong restoration of the connection between food production and consumption, with food growing not simply being the preserve of rural areas, but coming into and around towns and cities. The notion of the ‘city farm’ has changed significantly in the last couple of decades; with intelligent management systems recycling the ideal nutrient mix from treated animal and human waste, market gardens, some many storeys high, make a real contribution to the fresh produce eaten by urban consumers.

An enthusiasm for food growing also manifests itself in a much greater degree of production by consumers themselves, at home, on allotments and on odd plots of community and private land. While it definitely does keep bills down – and help people feel more certain about the quality of their food – it is also now a key part of social and community life. A far greater proportion of food consumption is taken out of market exchange, with people growing their own and exchanging it through non-monetised swaps, frequently via online sites such as myLETS.org.

Food retail, unsurprisingly remains omnipresent, but the market share of major multinational supermarkets is on the wane in the UK with bigger markets and margins to be had elsewhere in the world. Instead, the high street is back in vogue with a diverse retail offer that provides greater local and regional distinctiveness. Regional chains mix with street markets and smaller more specialist shops.

UK distribution networks tend to be short-distance and built around food hubs, where relatively small quantities of local production can be consolidated for delivery, using shared trucks.

Eating out is less common than it once was. Much socialising around food takes place in the home – or at the allotment barbecue.

## Scenario 4: A lot of allotments

From: tina@alotofallotments  
To: kathyperry@inthefuture.com  
Subject: Fwd Gourmet Gardens Daily 12062022

Hi Kathy,  
Thought you might be interested in this newsletter  
gardens daily. Looking forward to dinner at your place  
Cheers

Tina xx

-----Forwarded message-----

From: newsletter@rwhatueat.org  
Date: Sunday, June 12 at 15.33  
Subject: Gourmet Gardens Daily 12062022  
To: tina@alotofallotments.com

### Gourmet Gardens Daily

[www.RWhatUEat.org/self\\_supply/ggdaily1287.xml](http://www.RWhatUEat.org/self_supply/ggdaily1287.xml)

**[Local]** Our annual planting calendar is available as a special download starting today. Newly updated, it adjusts planting and rebedding schedules to fit our abbreviated winters and longer, warmer springs. We've also included pointers to luscious new fruit and vegetable varieties that can now safely migrate up to our latitude. If you haven't already converted your lawn from turf to turnips and tomatoes, these varieties will persuade you.

Remember this weekend's food festival at Blenheim: those new varieties will be available to taste, and you can also barter all your excess tomatoes for your neighbour's extra runner beans. MyLETS.org is a good place for newcomers to the barter economy to find trading partners and advice: join the consumers who also produce.

But we're not just introducing newcomers, we're also celebrating the classics with a Seedy Sunday. The EU seed catalogue registration rules have relaxed and more and more people are cultivating and disseminating seeds from heritage plants and trees. Support biodiversity, create a more robust and disease-resistant, agricultural ecosystem, and enjoy delicious variations on some old fruit and vegetable themes. Down with monoculture!

**[Global]** Government has been working in conjunction with the European Parliament to support an expansion of agriculture in the EU, now that more food crops can be produced in the northern hemisphere. "We produce high quality crops -- but they are also high cost" says UK minister for food security John Smith. The world's bulk low-quality, low-cost foodstuffs are all being shipped East. Lowering costs and meeting more of our own needs requires increased efficiency of production. That may require an increased reliance on GM foods, despite the controversies entailed. The rest of the world is applying every technological advantage possible to keep abreast of global food needs. Can we do less?"

Ironically, the influx of bulk, low-quality, over-processed foods to the Chinese and Indian consumer markets has driven obesity rates there to 50%. In contrast, resource constraints in the UK food markets, coupled with an increased educational emphasis on health and well-being in UK schools -- including new curriculum resources on nutrition, food production, and cooking -- has produced the healthiest generation of school children yet. Obesity among children has dropped to less than 30%.

**[Technology]** Advances in AmbientPantry room-temperature storage system doubles their previous guarantee of "like-fresh" shelf-life for home-processed food. We won't retire our refrigerators yet -- but it's another step towards energy-self-sufficiency as well as food self-sufficiency.

**[Recipes]** For more of our delicious tasty treats and ideas on what to make with all the fresh vegetables and



©Pete Lewis

Planting at the allotment

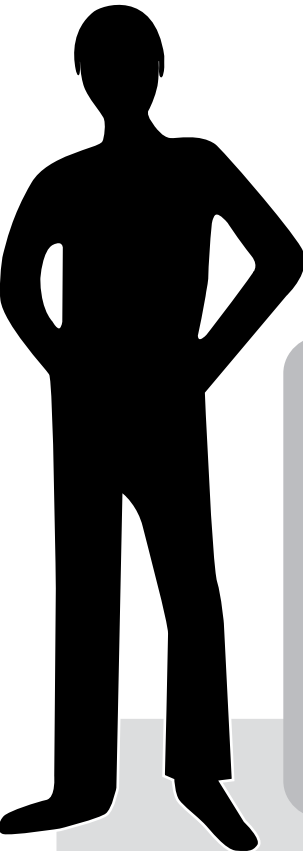
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## Meet the people:



"I saw the writing on the wall, left a big corporation, and now help support the growth of allotment production, barter and LETS, all based out of the local FoodHub. It's actually fun."

**Robin, logistics entrepreneur**

"People bid for my services on-line – I go to the client. The equipment's self-contained in my van, and we focus on minimising waste and help individuals and small concerns process their own foods."

**Victoria,  
self-employed mobile  
food processor**

"I run our local 'Seedy Sunday' – I specialise in obscure English heritage apple varieties. It supports biodiversity AND crumble!"

**Francis,  
seed steward/swapper**

"I used to manage a restaurant – but the sector is depressed overall. Now I specialise in "barter parties" and community food festivals."

**Geoffrey, food festival organiser**

"Big retail is retrenching – I advise clients to focus on small regions."

**Alison, food retail  
consultant**

"We went from casual to intensive gardening about eight years ago – with the looser regulations on backyard livestock, I'm thinking of buying some piglets."

**John,  
allotment farmer**



# Conclusions

## What building the scenarios told us

This report is primarily designed as a toolkit to help other organisations grapple with and plan for the uncertain future of the UK's food system. However, we also wanted to share what we had learned from working with the scenarios as part of our project on food distribution.

Our scenario process highlighted possible future trends that have received relatively limited attention in policy and business initiatives on food distribution, despite their potentially significant implications. These possibilities include:

- The prospect that scarcity of natural resources will become an overriding driver of change in the food sector. Steep rises in energy and food prices over the past year have built awareness of resource scarcity, but the possibility that very tight constraints on fuel, water and other factors of production could force a radical reconfiguration of the food system is rarely considered. Similarly, the challenge posed by resource scarcity to the presumption of continual economic growth is routinely ignored.
- People in the UK valuing the cultural and social dimensions of food much more strongly – a society where most people are 'foodies', and 'fuelies' (who see eating as a necessary hassle) are few and far between. Foodie citizens may be more alert to the climate change, animal welfare, health and labour rights implications of what they eat,

and more willing to pay for them, making it easier to meet a host of government objectives. Attitudes towards food and the opportunities to act on them are not innate personal characteristics – government, businesses and civil society can all influence whether the UK becomes a 'foodie nation'.

- The hugely significant changes in global trade and geopolitics that could arise as China, India and other fast-growing economies become increasingly influential in the international arena. The part that this played in recent food price rises is often overstated but how profoundly it could alter Europe's future place in the world, and our influence (good and bad) on domestic and international food security, is scarcely considered.
- The rapid pace at which ways of shopping change and the need for planning policy to think ahead about such changes in order to ensure they support sustainable development. Trends include online buying, direct delivery and driving less.
- Technologies that could overturn assumptions about what is and is not sustainable. An example might be in-vitro 'meat', already being cultured experimentally in laboratories. The ethical implications of this technology are yet to be explored in depth, but it would be relevant to consider how far in-vitro meat production could challenge assumptions about inefficiency of converting plants into animal protein.

You can find out more about how we used these findings in our report 'Food distribution: an ethical agenda', which is available via our website ([www.foodethicscouncil.org](http://www.foodethicscouncil.org)). They have also informed our thinking on wider issues, such as water scarcity, the climate impacts of livestock production and innovation processes.

But the most striking lesson we learnt from our scenarios was that the future can hit us sooner than we think. Over the course of our food distribution project – from our scenario workshops in May 2007 to the time of writing in 2009 – events that experts had told us were possible in more than a decade's time, but pushing plausibility, have already happened. One of these was a major upswing in food prices. Straining to see a long way ahead can shed light on what's just around the corner.

# Food Ethics Council

The Food Ethics Council is the independent advisory body on the ethics of food and farming. We:

- Help guide the way through difficult issues by analysing problems, challenging accepted opinion and creating a space for dialogue; and
- Build tools to put ethics at the heart of decisions about food in business, policy and civil society.

Our Council members include bioethicists and moral philosophers, farmers and food industry executives, scientists and sociologists, academics and authors.

Our work has covered topics including the personalisation of public health, the control of food research, the use of veterinary drugs and the growing challenge of water scarcity.

Find out more about our work, including the members of the Council, our exclusive Business Forum, and our must-read magazine, Food Ethics, on our website at [www.foodethicscouncil.org](http://www.foodethicscouncil.org).

## **Members of the Food Ethics Council:**

Ms Helen Browning OBE (Chair): Organic farmer; Food and Farming Director, Soil Association

Prof Ruth Chadwick: Director, ESRC Centre for the Economic and Social Aspects of Genomics

Dr Charlie Clutterbuck: Director, Environmental Practice at Work

David Croft: Director of Conformance and Sustainability, Cadbury

Prof Elizabeth Dowler: Department of Sociology, University of Warwick, researching food and social policy

Julia Hailes MBE: Freelance writer and consultant

Ms Jeanette Longfield: Coordinator of Sustain – the alliance for better food and farming

Prof Ben Mepham: Department of Policy Studies, University of Lincoln; Centre for Applied Bioethics, University of Nottingham

Prof Kevin Morgan: Director, Regeneration Institute, Cardiff University

Dr Kate Rawles: Freelance consultant

Prof Christopher Ritson (Treasurer): Professor of Agricultural Marketing, University of Newcastle upon Tyne

Prof Doris Schroeder: Professor in Moral Philosophy, Centre for Professional Ethics, University of Central Lancashire

Mr Geoff Tansey: Joseph Rowntree Visionary for a Just and Peaceful World

Mr John Verrall: Pharmaceutical chemist

# Acknowledgments

We would like to extend our thanks to the large number of workshop participants from food retailers, food service businesses, logistics companies, food manufacturers, research institutes and non-governmental organisations who helped to develop these scenarios. Their insights were invaluable, although they bear no responsibility for the details of the final scenarios.

We are grateful to Dr. Wendy Schultz of Infinite Futures who guided us expertly through the scenario process and facilitated the workshops, and to Arthur Potts Dawson, Executive Head Chef, and his team at Acorn House restaurant who fuelled our thinking in a sustainable way.

Thanks are also due to the Food Ethics Council's interns – Claire Carter, Frances Pollitzer, Tamarind Falk and Sarah Cannon – who assisted in developing the scenarios, and to Sam Harris, Oliver Sowerby, Matthew Tudge, Lauren Pratt and Trang Du for their design work.

Finally, we are very grateful to the funders of our food distribution project, the Esmée Fairbairn Foundation.



# Relevant publications

This scenario report is one of a set of reports from the Food Ethics Council's project on food distribution. It forms part of the evidence for the project's final report with recommendations, 'Food distribution: an ethical agenda'. Other reports relevant to our work on food distribution and sustainability are listed below, with further detail overleaf. All reports are available on our website at [www.foodethicscouncil.org](http://www.foodethicscouncil.org).

## **Meeting reports:**

Flying food: workshop report (May 2008)

Food miles' or 'food minutes': is sustainability all in the timing? (June 2007)

## **Research reports:**

Food distribution: an ethical agenda (October 2008)

Flying food: responsible retail in the face of uncertainty (May 2008)

Road pricing: could it promote sustainable food systems? (December 2006)

## **Editions of Food Ethics magazine:**

Meat: facing the dilemmas (December 2007)

Big retail: supermarkets want to go green, fair and healthy. Can they? (June 2007)

Working for food: suffering and success stories behind the dinner on our plates (March 2007)

## Other reports in this series



### Flying Food

Responsible retail in the face of uncertainty

The debate over the environmental costs and development benefits of air freighting food has matured in the months since the issue first hit the headlines.

Retailers will see civil society groups judge their performance on this issue against increasingly clear and challenging benchmarks.

This report describes what we think those benchmarks will be, based on a workshop with environment and development groups who have shaped the public debate on air freight, and who will continue to do so.

ISBN 978-0-9549218-2-8



### Food distribution

An ethical agenda

The way our food is distributed cements in place production, consumption and trading practices that destroy the environment, harm animals and are deeply unjust.

This report examines the impact of food distribution networks on our environment, economy, culture and communities, and their contribution to climate change.

This report offers a sustainable vision for the future of food distribution, and provides a roadmap for government, business and civil society to help us get there.

ISBN 978-0-9549218-3-5

We can't predict the future at the best of times. Yet the need to plan for a sustainable, ethical food system has never been greater. Improving food security, tackling hunger, obesity and injustice, supporting animal welfare, and preserving the environment, all demand urgent action in pursuit of long-term aims. How can we plan ahead wisely in a world that is bound to surprise us?

This report sets out four scenarios for the future of the UK's food, system, from production, distribution, retail, catering and consumption, to its role in politics, the economy and culture. The report includes exercises to help readers 'future-proof' campaigns, policies, and products, and develop their own vision of a more sustainable food system.



[info@foodethicscouncil.org](mailto:info@foodethicscouncil.org)  
ISBN 978-0-9549218-4-2