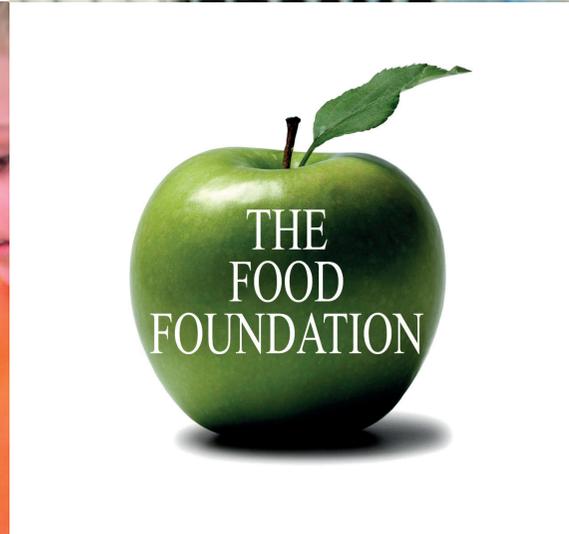




FORCE-FED

Does the food system constrict healthy choices for typical British families?



Executive Summary

This report looks at what typical British families eat, and what is influencing their choice of food and drink. We examine how easy it is for them to choose a healthy diet and review whether government policy could do more to make healthy choices easier.

Our typical British families have four members; two adults, and a primary and secondary school-age child. They have a total household income between £37,000 and £52,000; the middle-income band in the UK in 2013. There are approximately 1.5 million families of four in the UK who have an income at or below this level. Parents in our typical families are administrators, teachers, health professionals and builders. In the report we compile a picture of their diet, where they get their food and what influences their choices using national data sets, primary data collection, secondary sources and key informant interviews.

There are three main findings:

The diets of typical British families now pose the greatest threat to their health and survival. None of our family members meet all seven dietary standards that directly protect their health.

Two thirds of their calories come from highly processed foods many of which are, low in fibre and high in fat, sugar and or salt (HFSS). Adults are eating too much red and processed meat. The diets of children are particularly concerning: 47% of primary school children's dietary energy comes from HFSS foods, 85% of secondary school children are not eating enough fruit and vegetables, more than 90% are not eating enough fibre and all are eating too much sugar. Families are spending nearly a fifth (18%) of their money on food, throwing a lot away (equivalent to 6 meals per week), and not getting value for money.

A multitude of factors in their food environment get in the way of our family eating healthily.

- Advertising of food and drink reaches our family members, including the children, through multiple channels. Advertising budgets for unhealthy food and drink far exceed healthy products. Adverts for prepared convenience foods and confectionery account for 60% of food advertising spend.

- There is an abundance of food conveniently available to our family members. The number of places to eat out has increased by more than 50% in the last 10 years and the single biggest category is quick service restaurants (QSRs) which typically sell less-healthy meals.

- Promotions cause us to buy one fifth more than we otherwise would. Supermarket and eating out promotions are biased towards unhealthy foods. Cutting promotions on high-sugar foods and drinks could reduce our sugar consumption by 6%.

- Healthy choices within our family's popular product categories are limited. Only 5% of items, in four product lines bought by typical families (ready meals, breakfast cereals, bread and yoghurts), have low levels of fat, saturated fat, sugar and salt. Some products have quantities of nutrients which, in a single portion, exceed daily allowances.

- Labelling is confusing due to inconsistent use of traffic lights, no consistency in the use of portion sizes, continued use of *display until* and *sell by* dates and inconsistency between nutrient claims and traffic lights.

- School meals offer children protection from all this during the school day, and during term time, but uptake is only high among infants for whom the meals are free. Packed lunches are typically less healthy and the benefits of school food are undermined by what happens beyond the school gates.

We look at these factors in detail and show how government policy is currently too weak or inadequate to deal with these challenges to healthy eating.

The balance of prices of their food is wrong, tipping them even further towards unhealthy diets. Healthier foods are three times more expensive than HFSS foods as a source of dietary energy and the price difference is growing. Quick service restaurant meals which tend to be less healthy are on average £10 cheaper than meals in pubs, restaurants and hotels. The cheapest foods tend to be high in fat, sugar or salt and low in fibre and are often highly processed. In contrast, fresh fruit and vegetables are

relatively expensive. Meat is affordable to typical families but carries a large environmental footprint. We look at the range of factors that are contributing to this price picture by tracing back, through the food system, three items that are popular to typical families: fresh meat, a yoghurt and potatoes, and show how government policies contribute to this situation.

- **Cheap meat:** It costs about £1.50, and takes 35 days to produce a chicken that is ready to eat. Intensive chicken farming is very efficient and profitable, but farmers benefit from subsidies. Beef production is heavily subsidised and in spite of the higher production costs, the cost to consumers is similar to chicken. Moreover, some of the costs of meat production are externalised and not captured in the production or retail costs – such as the environmental impact of feeding chickens on imported soy.

- **Cheap processed food:** The brand-leading yoghurt purchased by typical families is a cheaper source of calories than natural yoghurt. By partly substituting yoghurt and adding 12 other ingredients, a processed yoghurt can be produced more cheaply and with a higher profit margin, but with levels of sugar which almost exceed a child's daily allowance.

- **Costly vegetables:** With the exception of potatoes nearly half (42%) of all other vegetables eaten in the UK are grown outside the country. UK vegetable production is declining. Vegetables imported from outside Europe are subject to import tariffs. While general cropping farms growing potatoes receive significant subsidies, horticulture farms are the least subsidised of all. The Groceries Code Adjudicator has limited powers, which means that retailers and their intermediary suppliers, secure a larger proportion of the value of potatoes sold. Retailers' grading standards mean up to a third of vegetables are wasted before reaching the store.

Educating individuals on how to make healthy choices can't work when there are so many factors pushing behaviour in the opposite direction. The onus is on government to take concerted action (from local to European level) to make it easier for people to eat healthily. We recommend four actions for government:

Executive Summary (continued)...

1) Set out a clear vision for achieving healthy and sustainable diets for all, with targets that can be monitored.

This should be in support of the world's new 2030 Sustainable Development Goals and build on the Paris climate summit and forthcoming Childhood Obesity Strategy. The 2016 Rio Olympics' Nutrition for Growth summit would provide a global platform to make this commitment.

2) Use policy measures to achieve a healthy balance in food costs.

Policies that affect the relative price of healthy and unhealthy food should be reviewed. Efforts to reduce household waste and increase purchasing power of family budgets should be strengthened. Introducing a 20% excise duty on sugar-sweetened beverages should be implemented. Beyond this, adjusting policy to make vegetables more affordable should be a priority, including using subsidies, renewable energy incentives and waste reduction policy more strategically. This should be the focus of an Environment, Food and Rural Affairs Select Committee Inquiry and a central component of the review of the Groceries Code Adjudicator in 2016.

3) Manage the food environment so it enables healthy choices, particularly for children.

Priorities are:

- a. Banning advertising of HFSS foods on TV before the 9pm watershed.
- b. Developing a new marketing code to prevent advertising, sponsorship and promotions of HFSS through all non-broadcast channels, in supermarkets and eating out establishments.

- c. Helping to increase the proportion of low cost, healthy eating out options by clarifying planning policy for unhealthy eating-out establishments near schools and enforcing the Government Buying standards to help drive up standards for all food service suppliers.
- d. Setting upper limits for high risk nutrients in processed foods.
- e. Driving for improvements in labelling regulations in Brussels.
- f. Incentivising school leadership on school food using Ofsted inspection.

Local authorities and cities that are leading the way in improving food environments should be given opportunities to influence central policy making, using channels such as the Local Government Association/Department of Health's Care and Health Improvement Programme.

4) Make it easier for consumers to know what they are eating so they are empowered to demand a healthy and sustainable food system. Supply chains for processed foods have become complex and opaque making it hard for consumers to know what they are eating. For fresh food, much more could be done with livestock farmers, processors and retailers to better inform consumers about the meat they eat, how it is produced and its environmental footprint. This requires a clear role for the Food Standards Agency in setting standards around transparency and publicly available information about products on sale, development of digital tools to allow consumers to easily access this information and working with the media to communicate the information.

Good nutrition underpins strong economies. It is crucial to cognitive development, educational and skills attainment. It prevents absenteeism at work and improves productivity. It reduces health care costs. Tackling obesity could deliver economic benefits worth £17billion per year including an £800m annual saving to the NHS. Sound economic planning requires balancing short-term productivity gains against long-term economic advantage achieved by having a healthy workforce, and addressing inefficiencies created by irrationalities in the policy environment.

The children in our typical family have very poor diets; one in three of them are overweight and obese, with all the concomitant psychological and health consequences; and a growing number are even experiencing Type 2 diabetes in adolescence. These children are tomorrow's parents and our future workforce. If nothing else, we need a food system and food policy that goes much further in helping to ensure that they can eat more healthily.

This report offers a system-based analysis of some of the policy levers that can be used to make it easier for typical British families to make healthy choices and avoid the life-threatening and costly consequences of diet-related disease, while at the same time going further to protect us all from the disastrous effects of climate change.