



Rural Policy
GROUP

Water, Food and Economic Growth

**Sustainable
Food Report**
June 2026

NORFOLK

England's driest county pioneering water-efficient food and the processing powerhouse securing the UK's food supply.

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Foreword

Effective water management is the unsung hero of economic growth. W H Auden, who spent his formative years at Gresham's School in Holt sums up the fundamental life-sustaining importance of the liquid, "Thousands have lived without love, not one without water".

Norfolk has an unparalleled pedigree in pioneering waterscape conservation and producing food in a water-constrained topography. Managing water well has the potential to become one of UK plc's biggest competitive advantages as climates around the world become drier and flows of food and other products react. Just as the Norfolk four-course rotation changed how the world farmed in the 18th Century, Norfolk's innovation in growing and processing water-efficient food will lead the way for the food industry of tomorrow.

The Iran conflict added a new layer of complexity to global supply chains this year. It highlighted weaknesses and reinforced the need for a food security policy strong on domestic production. High food price inflation and threats of scarcity are now familiar (and inevitable) features of geopolitical shocks; they undermine the efficient functioning of the food system and restrict access for vast swathes of society.

The obvious response is to onshore production of more of the country's food supply at prices which are preferential to consumers. How we go about this is much less obvious.

Food is already a low-margin industry, frequent periods of high inflation absorb any tolerance consumers have for price increases, and reducing profitability ratios in the supply chain would initiate a wave of disinvestment and reduce output volumes. Cutting prices to match imports produced to different standards by people paid lower wages is not the solution. The answers lie in 'more carrot, less stick'.

The value chain has shown exceptional ingenuity in delivering food at extremely competitive pricing: reducing inputs, harnessing big data, developing and adopting novel technologies, trialling new crop varieties, experimenting with new methods. It has also shown an eagerness to engage in peer-to-peer learning and a thirst to emulate exemplars of best practice to improve resilience, volumes and efficiencies. Farming and the onward supply chain is evolving quickly – with benefits for environmental recovery, public health, high quality education, training and employment, the UK's international profile and economic growth.

Industry advances exist within an ecosystem of policies, tax mechanisms and consumer choice. They cross the ministerial remits of Treasury, business, trade, health and Defra. Closer collaboration between industry and government is the critical next step to delivering a stable food supply for the UK and economic growth.

This policy paper asks Parliamentarians and policymakers to give greater consideration to food in policy decisions and account for the industry's importance to national security, natural resource management and green economic growth.

Katie Tucker
Executive Director, Rural Policy Group Ltd

The Value of AgriFood

£171bn¹

GVA contribution to the UK economy by the farm to fork supply chain

25%²

of all UK manufacturing is in food and drink, more than the aerospace or automotive sectors

4.2 million³

people employed in the food supply chain, with many more in education and training

378,000⁴

businesses in the food supply chain

£25bn⁵

value of food and drink exports

£41.3bn⁶

trade deficit in food and drink to be closed

17 million⁷

hectares of land are employed in food production

60 litres⁸

of water are typically needed to grow 1kg of potatoes

36% FPI⁹

since 2021 significantly outpaced the 24% increase for consumer prices overall

£66,000¹⁰

is the average income by farm holding, which does not include costs of unpaid labour

1 Powering Communities Regional Report 2026 - Food & Drink Federation

2 Powering Communities Regional Report 2026 - Food & Drink Federation

3 Powering Communities Regional Report 2026 - Food & Drink Federation

4 Powering Communities Regional Report 2026 - Food & Drink Federation

5 Powering Communities Regional Report 2026 - Food & Drink Federation

6 Powering Communities Regional Report 2026 - Food & Drink Federation

7 Agricultural Land Use in the United Kingdom - Defra

8 Water Management for Potatoes - UK Irrigation Association

9 CPI Index 01: Food and Non-Alcoholic Beverages - May 2026 - ONS

10 Farming Evidence Key Statistics - October 2025 - Defra

A Model ESG Regulatory Framework for the Norfolk AgriFood System

Applying Double Materiality to Drive Economic and Environmental Value

Written by **Mark Lumsdon-Taylor**

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The Norfolk agrifood system is one of the UK's most important regional economic assets. It combines high value agricultural production with a well-developed network of processing and distribution. At the same time, the system depends on a limited set of natural resources such as water, soil quality and climate stability. Resources which are under increasing pressure.

This report applies the Corporate Sustainability Reporting Directive (CSRD) principle of double materiality to provide a clearer and more useful understanding of the Norfolk food system. It recognises that agricultural activity in Norfolk has direct impacts on environmental systems including greenhouse gas emissions, water use, soil condition and biodiversity. It also recognises that changes in those resources will influence the future economic performance and resilience of the region. In Norfolk, these two dimensions are closely linked. The factors that drive environmental impact also determine financial risk and long-term

productivity. Environmental Social Governance (ESG) therefore should not be treated as a separate reporting layer. It should be understood as a central framework for managing economic growth and competitiveness across the region.

Double Materiality Assessment for Norfolk
Double materiality is a corporate reporting concept that requires companies to assess and disclose sustainability information from two angles: how environmental and social issues impact a company's financial value, and how a company's operations impact the environment, society and communities it operates in.

A structured Double Materiality Assessment (DMA) has been undertaken to identify the most significant ESG topics for the Norfolk agrifood system. The table below sets out the key issues and their relevance from both an impact and financial perspective.

Norfolk Double Materiality Assessment Table

ESG Topic	Impact on Environment and Society	Financial Risk or Opportunity	Overall Materiality	Norfolk Context
Water availability and use	High impact due to irrigation demand and abstraction pressures	High financial risk from constrained supply and regulatory limits	Critical	Strong dependence on irrigation with increasing seasonal stress
Greenhouse gas emissions	High impact from agricultural production and inputs	Medium to high risk from transition policy and cost changes	High	Emissions linked to intensive arable and livestock systems
Soil health and land use	High impact through long term soil degradation risks	High financial risk through reduced yields and increased input costs	Critical	Large areas of productive land reliant on soil quality
Biodiversity and ecosystems	Moderate to high impact from land use intensity	Increasing financial relevance through regulation and markets	Medium to High	Growing importance of nature-based policy and investment
Supply chain resilience	Moderate impact through global sourcing patterns	High financial risk from disruption and volatility	High	Exposure to global input markets and logistics pressure
Energy and input costs	Moderate environmental impact	High financial risk from price volatility	High	Dependence on fertilisers fuel and energy markets
Labour and rural economy	Moderate social impact	Medium financial risk through skills gaps and workforce pressure	Medium	Importance of agricultural labour and rural stability

Interpretation of the DMA for Norfolk

The DMA highlights a clear pattern. The issues with the highest environmental impact are also those that present the greatest financial risks. Water emerges as the most significant factor. It is both a major environmental pressure and a direct constraint on future production. Soil health follows a similar pattern as it underpins long term productivity while being vulnerable to degradation.

Climate-related emissions and input dependency also represent key transition risks. These are likely to become more important as regulation tightens and market expectations evolve. This analysis confirms that ESG issues in Norfolk are not peripheral. They sit at the heart of the region's economic model and must be managed accordingly.

Norfolk System Dynamics, Value, Risk and Constraint

Norfolk has a high output agrifood economy with strong supply chain connections. This creates significant value but also creates dependency on natural systems. Water is the most immediate constraint. Agricultural production relies on a stable water supply, yet this is becoming less predictable due to seasonal variation, changing weather patterns and competing demand. It is important to balance and manage the tension between maintaining/increasing output and ensuring long term sustainability.

The concept of a permacrisis also shapes the operating environment. Rising input costs, supply chain disruption and geopolitical pressures are ongoing rather than temporary. These conditions necessitate a more resilient and adaptable system. Norfolk can therefore be described as economically strong but conditionally so. Its future performance depends on how well environmental limits and system risks are managed.

A Practical ESG Modelling Approach for Norfolk

To put double materiality into practice Norfolk requires a clear ESG modelling framework that links environmental impact to economic outcomes. The starting point is activity data. This includes production volumes, water use, energy consumption, fertiliser inputs, and land use patterns. These data describe how the system operates in physical terms, and the information is then translated into environmental impacts using standard methods such as greenhouse gas accounting and water stress analysis.

The model produces two outputs. The first shows environmental impact across the system. The second

shows financial exposure to risks such as water scarcity, soil decline, and input price volatility. This allows decision makers to understand how improving environmental performance can reduce risk and strengthen economic resilience.

Governance Data and Reporting

A consistent approach to ESG reporting is required across the Norfolk system. Farms, processors and supply chains working to shared standards so that performance can be measured and compared. Improved data systems are also essential; such as linking farm level data to wider datasets on climate and water. Over time this can support more advanced system level monitoring. Such a framework would align with CSRD requirements on explicit double materiality disclosure. It would also support reporting across climate, water and biodiversity metrics while linking these directly to economic outcomes.

Strategic Opportunities for Norfolk

The adoption of this framework creates clear opportunities. Norfolk can strengthen its position as a leading agricultural region by improving soil health, reducing emissions and using water more efficiently. This supports both productivity and market credibility.

Water management offers a particularly important area for investment and innovation. Improving efficiency and coordination at catchment level can reduce risk and protect long term supply. Alignment with ESG also improves access to investment and supports long term resilience through reduced exposure to shocks.

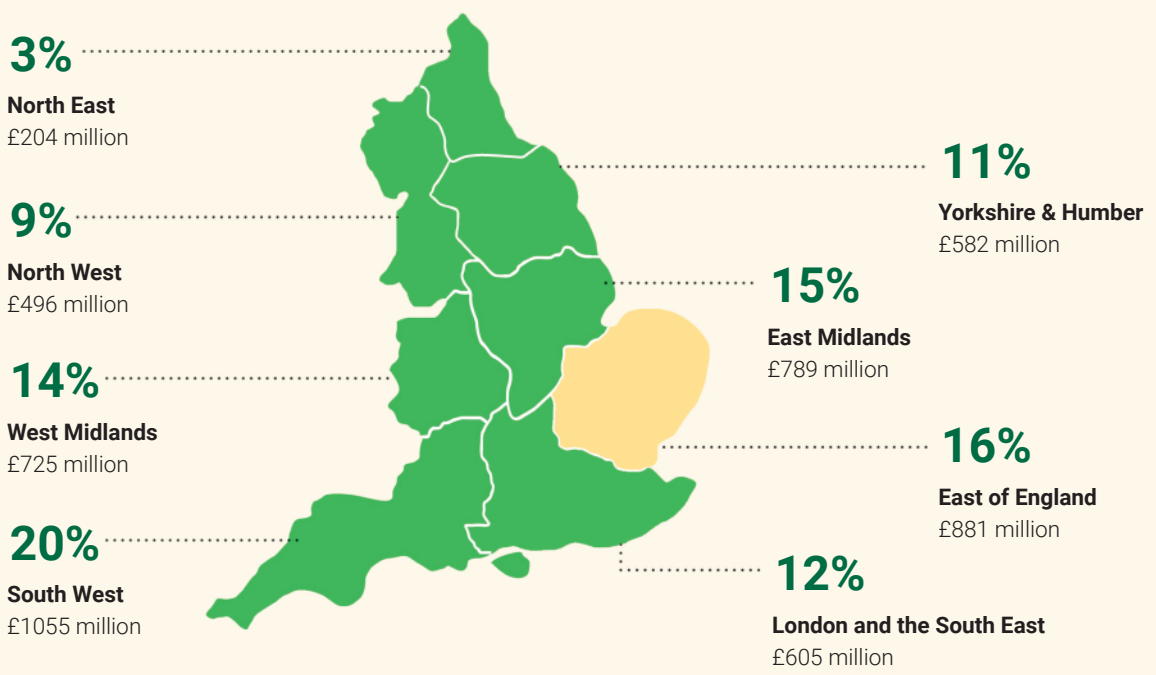
In Conclusion

The inclusion of a structured Double Materiality Assessment makes clear that environmental and economic performance in Norfolk are closely connected. By integrating these perspectives within a single ESG framework the region can move beyond compliance and draw on a broader and more detailed dataset to inform strategic planning, and how future economic and environmental potential are managed. Natural resources treated as core assets risks are clearly understood and their long-term value is strengthened. In this way ESG becomes the central mechanism through which the Norfolk agrifood system is planned, managed and sustained.



Valuing the Norfolk Food Powerhouse

Total Income From Farming¹



¹ Total Income from Farming in the regions of England in 2024 (updated September 2025)

Norfolk's AgriFood Industry

Norfolk is home to over 940,000 people (2024¹) and is a predominantly rural county, with only Norwich (206,000) in the UK top 30 built up areas. Norfolk has several larger towns including King's Lynn (48,000); Great Yarmouth (29,000); Thetford (25,000); Gorleston (24,000); and Dereham (21,000); and a further 62 market towns or larger villages with 2,000–20,000 people.

It remains a predominantly rural county with a large farming sector managing more than one million acres, making it a leading UK producer of food.

Norfolk's agricultural sector is one of the UK's most productive with large areas of arable and horticultural production; and is also a leading centre of the UK's intensive livestock industry with significant pig and poultry populations, especially turkeys, geese and chickens.

The county also has extensive areas of environmentally significant land including the Broads National Park, and the North Norfolk AONB. Whilst now a smaller industry than in the past, Norfolk also retains a small fishing fleet contributing over 4% of England's shellfish catch, primarily operating from King's Lynn and Wells (England's 19th and 33rd largest fishing ports respectively by value). Norfolk's scale and diversity of soil types mean it is important nationally for a wide range of farming products, including:

Norfolk is a leader in intensive livestock production, with:

- 17% of the English pig herd and even larger share of the breeding herd at 23%
- 68% of the geese
- 38% of turkeys
- 24% of ducks
- 14% of egg layers and broilers

Norfolk also has 8% of England's farmed deer and 1.3% of the cattle. In crop production Norfolk produces:

- 31% of England's sugar beet
- 13% of potatoes
- 18% of the peas and beans

17%

of the English pig herd

38%

of the turkey flock

- 6.5% of England's cereals (including 9.5% of winter barley and 7.9% of spring barley predominantly for malting)
- 7% of oilseed rape
- 9% of the total horticultural area
- 10.5% of England's glasshouses and protected crops

This farm production supports a large food processing sector, with the share of employment locally over 190% of the English average, with particular strengths in sugar processing with more than a quarter of English employment, and in poultry processing, with 10% of English employment. Norfolk is also renowned for its poultry expertise especially for Christmas table birds, being widely recognised for turkey production, most notably the premium Norfolk Black, and produces more than 2/3rds of England's geese.

It also has a growing drink processing sector, including several smaller and regional brewers such as Woodfordes, supported by the local malting barley industry which produces world class malt via national leader Crisp Malt at Great Ryburgh. Recent years have also seen the growth of a dynamic distillery industry, including gin producers such as Whatahoot, and England's oldest Whiskey distillery founded in 2006 (English Whiskey).

With much of its landscape known for gentle rolling hills and just under 10% of the world's chalk streams, Norfolk possesses a growing range of award-winning vineyards on south facing chalk slopes. Notably, the Winbirri Vineyard in the Yare valley, which won a Decanter's Platinum Best in Show at the World Wine Awards for its 2015 Bacchus. Norfolk's sparkling white wines and rosés are increasingly internationally acclaimed for their high quality and crisp flavour. Whilst much of the agricultural and food processing sector focuses on commodity food production for supermarkets and the food service or hospitality sector,

¹ Nomis - Query Tool - Population estimates - local authority based by single year of age



Norfolk has also developed national recognition for distinctive food and drink products drawing on its landscape, coast and heritage.

Norfolk Samphire, and Cromer crab are internationally known, with Visit North Norfolk using the 'Cromer Crab' as its logo², directly linking the area to its food heritage when marketing the coast. Moreover, the county's major estates such as Sandringham and Holkham organise annual food festivals bringing regional specialities to the fore.

Despite a relatively small dairy sector, on farm processing has delivered a thriving cheese scene with Binham Blue and Norfolk Dapple nationally recognised.

Norfolk, especially the West of the county on the edge of the Fens is a centre of intensive horticulture with a focus on ornamental crops and fruit, including leading businesses such as PS and JE Ward (Norfolk Tulips), Collison Cut Flowers, Hillgate Nurseries, RW Walpole.

In North Norfolk, Place UK are amongst the largest soft fruit growers in the country and in the west RW Walpole produce fruit plants as well as fruit.

Norfolk Tulips recently found fame in the Wicked film franchise as the film location of Munchkin land; with their tulip fields also attracting tens of thousands of visitors annually generating c.£500,000 of donations for Tapping House Hospice in 2026.

The Green House Growers 16ha greenhouse in Norwich was the first globally to be heated with waste heat from a water treatment plant. British Sugar have co-located a 18ha greenhouse with their sugar processing plant at Wissington, which now specialises in medicinal crops.

Norfolk also has intensive producers of vegetables including some of the UK's largest such as the Elveden Estate, Fred Hiam and Alfred G Pearce, all UK leading producers of salads or vegetables.

Given this strong primary production, Norfolk has a diverse range of large agrifood and agrifood support business sites across the county, including:

2 Food & Drink in North Norfolk - North Norfolk (visitnorthnorfolk.com)



Nationally Significant Facilities and Service Providers such as:

- British Sugar, with two of their four national plants in Norfolk:
 - Wissington Sugar Factory, the largest sugar processing facility in Europe, which processes 3 million tonnes of sugar beet per annum³.
 - Cantley Sugar Factory, which processes 1.5 million tonnes of sugar beet per annum.
- AF Group – the AF Group (formerly Anglia Farmers) is located on the Honingham Thorpe Estate and is Norfolk’s largest farm co-op buying over £330m per year of inputs for over 3,000 farms of whom just under half are in Norfolk⁴.

Poultry with company sites such as:

- 2 Sisters Food Group Thetford producing added value breaded products for supermarkets with 900 staff.
- Banham Poultry (2018) in Attleborough producing fresh chicken products. Since 2018 Banham Poultry has been owned by the Boparan family, the owners of the 2 Sisters Food Group.
- Traditional Norfolk Poultry in Attleborough, an independent Norfolk company farming and producing chicken and turkey products from a network of supplying farms.
- Anglia Free Range Eggs Attleborough is an independent farmer owned egg wholesaling company now supplying more than £60 million of eggs per annum under the ‘Yolk’ brand, employing 60 staff.

Meat Processing including:

- Cranswick Country Foods Watton (part of Cranswick PLC) with 1,090 staff producing over 110 fresh and prepared pork products.
- Pilgrim Food Masters Little Ellingham (part of Pilgrims, itself part of JBS SA the world’s largest meat company) employing c.400 staff producing prepared meals.

- Pilgrims Europe King’s Lynn (part of Pilgrims, itself part of JBS SA the world’s largest meat company) with over 250 staff producing added value meat products.
- Nature’s Menu Snetterton with over 250 staff is a leading UK pet food brand.

Prepared and Frozen Food Suppliers including:

- Pasta Foods Norwich an independent manufacturer of pasta products.
- Greenyard Frozen King’s Lynn, a vegetable processing and freezing facility belonging to the Belgian Greenyard group.
- Lakeside Food Group Wymondham (owned by the Boparan family office) is a supplier of chilled and frozen products to the retail, manufacturing, and food service sectors.
- Kinnerton Confectionery Fakenham, with almost 700 staff is a major producer of confectionery and is part of the German Zertus food group;
- Mars Food and Nutrition King’s Lynn (Part of the Mars group) producing Ben’s Original and Dolmio food products for the UK and 14 export markets.
- Jonas Seafoods Cromer is the national processor and supplier of Cromer crab as well as a range of other seafood, the company employs more than 50 staff.

AgriFood Marketing and Logistics including:

- Warburtons distribution centre in Thetford, part of the Warburtons bakery group.
- Kinaxia Warehousing Roudham, which also owns Foulger Transport Snetterton, and provides logistics services to the agrifood sector.
- Turners of Soham Norwich, and Lynn Star Distribution King’s Lynn are operated by the Turners of Soham group, one of the UK’s largest independent food logistics providers.

3 Advanced sugar manufacturing plants | Our factories

4 AF Group | UK’s Leading Farm Procurement Cooperative

- Bulk grain terminals at Kings Lynn and Great Yarmouth ports. There are also major national and regional grain traders and grain based livestock feed manufacturers such as Frontier Agriculture, AB Agri, Duffields, Dewings Grain, Heygates, Saxon Agriculture and many others. Major grain coops such as Camgran also support multiple Norfolk farms.

Technology and Equipment Providers such as:

- Foster Refrigerator and Gamko King's Lynn are food and drink industrial cooling technology providers, as divisions of ITW Ltd. They are part of the American multinational Illinois Tool Works Inc.
- Precision Refrigeration Thetford, an independent manufacturer of food service refrigeration equipment.
- AFE Group Limited headquartered in King's Lynn is a manufacturer of professional bakery, cooking and refrigeration equipment, with almost 1,000 staff across its international operation.
- CCL Labels King's Lynn, part of the CCL Industries group, the largest packaging manufacturer globally, supplying the agricultural, food and pharmaceutical industries.
- Sensient Industrial Colours King's Lynn a leading international manufacturer and exporter of industrial dyes and pigments, including for seed coatings, fertilisers, and spray pattern indicators.
- Multiple fertiliser supplies including: Omex King's Lynn producing a range of agricultural fertilisers, and part of the international Omex fertiliser group; Nitrasol who import and supply liquid fertilisers.
- Germains Seed Technology offer a range of innovative seed solutions for sugar beet, vegetables and flowers. It is a technology division of ABF Grain Products Limited, part of Associated British Foods PLC.

- Oxbo Fakenham is the manufacturer of the Ploeger and PMC pea harvesting range and is a division of the Dutch Oxbo group, which sells harvesters to more than 40 countries.
- Sands Agricultural Machinery (SAM), Catfield is an independent manufacturer of a range of self propelled agricultural sprayers;
- Ben Burgess at Norwich, King's Lynn, Beeston, and Aylsham, the UK's leading John Deere machinery dealership and service provider.
- Ernest Doe Fakenham, North Walsham, and Wymondham, the regional dealership and service provider for Case New Holland.
- Thurlow Nunn Standen at Attleborough, and Fakenham, the regional dealership and service provider for the AGCO agricultural machinery brands.
- Claas Manns Dereham, the regional wholly owned Claas subsidiary dealership and service provider.

Drinks Manufacturers including:

- Broadland Drinks Norwich, a leading UK wine producer.
- Woodfordes Norwich, a regionally leading brewer.
- English Whiskey Roudham, England's longest established whiskey distillery.

**Regional
expertise
in sugar**

31% of the sugar
beet crop

27% of manufacturing
employment

2 of British Sugar's four
processing facilities



Economic Impact of the Norfolk AgriFood Industry

In 2024, Norfolk's total workforce was 394,000 people, or 1.4% of total employment in England (28.4m)⁵. In 2023, Norfolk's total GVA across all industries was

£24.6 billion, equivalent to 1.2% of English GVA (£2,113billion), and 1.0% of UK GVA⁶ (£2,464billion). On most metrics, Norfolk's share of agriculture and the food sector is higher than this, showing how important the agrifood sector is to the Norfolk economy and the role Norfolk plays in national food security.

Agriculture and Horticulture

Norfolk had c.3-4% of England's farms, farmland area and workforce in 2025⁷:

Area	Total holdings	Total area on holdings (hectares)	Full time farmers, partners, directors & spouses	Total workforce
Norfolk	3,123	405,741	2,589	10,936
Norfolk % of England	3.1%	4.5%	2.9%	3.9%

Norfolk's average farm size was also larger than England's, with an average holding of 130 hectares, compared to 90 hectares nationally. Norfolk's land use is predominantly arable, although it still has significant areas of temporary and permanent grassland, and a small area of rough grazing distributed across the county's heathlands.

Norfolk also has slightly more farm woodland than its share of total area, and the county also possesses significant areas of forestry commission woodland not included within this total, most notably England's largest lowland forest, the 18,730-hectare Thetford Forest⁸ which doubles the total woodland/forest area in Norfolk.

Area	Hectares				
	Arable crops & uncropped	Grassland			Farm woodland
		Temporary <5 years	Permanent > 5 years	Sole right rough grazing	
Norfolk	284,931	18,771	56,266	2,480	18,780
Norfolk % of England	7.2%	2.2%	1.8%	0.6%	4.9%

DEFRA data shows that Norfolk's share of multiple crops is above average⁹ for peas and beans, potatoes,

protected crops, and vegetables and salads:

Area	Hectares							
	Total cereals	Sugar beet	Potatoes	Oilseed rape	Peas and beans	Glasshouse & protected	All other veg & salad	Total horticulture
Norfolk	161,168	28,885	11,460	13,989	4,625	102	4,113	10,330
% England	6.5%	31.2%	12.8%	6.9%	18.2%	10.5%	7.7%	8.8%

⁵ Nomis - Query Tool - Business Register and Employment Survey : open access

⁶ Regional gross value added (balanced) by industry: all ITL regions - Office for National Statistics

⁷ Structure of the agricultural industry in England and the UK at June - GOV.UK

⁸ Thetford Forest | Forestry England

⁹ Relative to arable area

Norfolk has grazing livestock herds below its proportion of English farming, except for farmed deer, but still

possesses a significant beef breeding herd, and a small sheep flock.

Area	Cattle			Sheep		Farmed deer
	Dairy breeding herd	Beef breeding herd	Total cattle	Female breeding flock	Total sheep	
Norfolk	5,060	13,007	59,397	60,258	121,985	1,701
% England	0.5%	2.4%	1.3%	0.9%	0.9%	8.0%

Intensive livestock production is a key feature of Norfolk farming. Norfolk is a leading pig producer, concentrated

on lighter sandy soils in the north, west, and south of Norfolk and the Breckland.

Area	Pigs		
	Breeding	Fattening	Total
Norfolk	70,928	547,523	618,450
% England	22.7%	16.4%	16.9%

Norfolk also has significant shares of poultry, and most notably produces more than 2/3rds of England's geese. This poultry is primarily concentrated in Breckland and

South Norfolk which has more than one twelfth of all English poultry.

Area	Poultry ('000)						
	Laying flock	Breeding flock	Broilers	Ducks	Geese	Turkeys	Total
Norfolk	862	1,099	13,092	364	69	1,046	16,966
% England	3.9%	13.8%	13.8%	23.8%	67.9%	37.9%	12.8%

As shown below, in 2024 Norfolk was responsible for:

- 6.8% of total market output of English agriculture, more than £1.7billion.
- 7.8% of total income from farming, showing the higher profitability of Norfolk agriculture, with just under £420 million of TIFF.

- Had a GVA of over £760million or 7.1% of the national total, showing a more productive sector as its share of GVA is greater than its share of output (6.8%) or land use and workforce (3-4%).

Metric	Norfolk (£million current prices) ^{10/11}	Norfolk % of English
Total crop output	£844	8.6%
Total livestock output	£728	5.7%
Output at market prices	£1,730	6.8%
Total intermediate consumption	£968	6.5%
Gross value added at market prices	£762	7.1%
Total income from farming (TIFF)	£418	7.8%

10 Total income from farming for the regions of England - GOV.UK

11 Total income from farming in England - GOV.UK

Fishing

Norfolk's ports¹² landed over 2,500 tonnes of fish worth almost £5 million¹³ in 2025, made up almost entirely of shellfish with 2,492 tonnes landed, worth £4.8 million. The shellfish industry is primarily made up of whelks (£1.45 million) and brown shrimp (£1.325 million), with smaller catches of lobster, cockles, crab, and scallops. The county also reports small catches of a wide range of demersal and pelagic species, though such fishing activity is primarily tourism related.

Norfolk landed 3% of the English catch by tonnage, though only 1.9% by value, demonstrating the relative low value of its shellfish fisheries, reflecting both the lower average value of shellfish compared to demersal fish, and Norfolk's greater concentration on lower value shellfish varieties. Interestingly however, the value of pelagic fish landed in Norfolk – mackerel, herring and sprats – was more than three times the English average per kilo.

Food Processing and Added Value

Norfolk has a well-developed food processing and added value industry with high shares of English jobs and GVA¹⁴. Food and drink manufacturing employment was 9,600¹⁵ (2024), or 2.6% of the English total:

- Primarily in food processing (9,000), where Norfolk has 2.7% of total English employment, and has a location quotient (LQ) of 1.94, indicating the region is a specialist hub for this activity.
- Although Norfolk has a developing drinks sector with several growing vineyards, its share of drink processing employment was only 1.5% or 600, with the share of employment in Norfolk only slightly above the English average with an LQ of 1.08.

Norfolk has particular strengths in:

- The manufacture of sugar, with 27% of English employment.
- The processing and preserving of poultry with 11% of English employment.
- 8.6% of the manufacture of prepared animal feeds.

12 Brancaster Staithe, Cromer, King's Lynn, Wells, Sheringham, Great Yarmouth, and Winterton.

13 2025 UK and foreign vessels landings by UK port and UK vessel landings abroad: provisional data - GOV.UK

14 Regional gross value added (balanced) by industry: all ITL regions - Office for National Statistics

15 Nomis - Query Tool - Business Register and Employment Survey : open access





£2.3bn

Economic output of the food supply chain (excluding retail and food service)

- 5.0% of the processing and preserving of potatoes.
- 4.8% of the processing and preserving of meat.

This strong food and drink processing sector, in particular sugar and meat processing, corresponds to the agricultural clusters in Norfolk with its high shares of pig, poultry, and sugar beet production. Despite this strength in food processing, Norfolk still has a much higher share of agriculture than it has of food processing, suggesting there is real potential to add more value to food grown in Norfolk.

Supply Chain

Norfolk's agrifood production industry supports many jobs in input and machinery supply, logistics, marketing

and distribution of food. Estimated employment in the agrifood supply chain includes:

Agrifood Chain Sub-sector	Norfolk (2024)	Norfolk % of England
Agriculture, forestry and fishing	14,000	4.2%
Manufacture of Food and Drinks	9,600	2.6%
Agrifood Packaging ¹⁶	1,138	2.2%
Agrifood Wholesale	2,985	1.3%
Agri-Machinery Supply	935	4.0%
Agrifood Logistics	3,210	1.6%
Agri-Chem Supply	525	12.4%
Other Agrifood Inputs/Services/Research ¹⁷	7,034	2.7%
Total Agrifood Chain	39,426	2.7%
All Employment	394,000	1.4%

End to End Food Chain

The end-to-end food production, commercial food distribution supply chain, and agrifood innovation sector in Norfolk is estimated to employ more than 39,400 people, over 10% of the county's workforce, a share twice the national average seen across England (5.2% in 2024) In 2023, the total end to end sector, including input and service supply, research, and distribution accounted for

9.3% of Norfolk's total economy (£2.3 billion of £24.6billion in 2023), compared to a 4.2% share of England's total economy (£89 billion of £2,113 billion in 2023). Norfolk contributes almost 2.6% of national agrifood chain economic activity, more than twice it's overall share of all economic activity.

Metric	Norfolk Employment	Norfolk GVA
Agriculture, forestry and fishing	13,000	£564
Food and drink manufacturing	10,500	£677
Total estimated ancillary 'food chain' jobs	15,845	£1,034
Total end to end food chain	39,345	£2,275

This analysis does not include the consumer end of the food chain, i.e. food retail and catering services, which

nationally account for more jobs and GVA than the food production part of the food chain.

¹⁶ c.40% of the UK packaging sector relates to the agrifood sector.

¹⁷ N.B. over a third of this total sub-sector for Norfolk relates to the Norwich Research Park.

The Green Transition

Norfolk is a trailblazer in environmental delivery and was the location of the first agri-environmental schemes in Europe, which were pioneered in the Broads National Park in the 1980s. Since then, the county has seen continued delivery of environmental improvement and is now home to a range of national exemplar landscape projects such as the Wendling Beck¹⁸ project which helped support the development of the BNG (Biodiversity Net Gain) framework.

Other projects include the Ouse Washes Landscape Recovery project¹⁹ focused on lowland peat restoration, or the North Norfolk wilder, wetter, better for nature²⁰

project which is enhancing 5 chalk rivers and streams across more than 5,000 hectares, a globally rare habitat which Norfolk has more than 10% of²¹.

In 2025, Norfolk had an area under agri-environment schemes²² equal to just over 68% of the total area²³ in the county, compared to just under 63% for England as a whole, showing a higher take up of agri-environment schemes. North and West Norfolk, Breckland and South Norfolk have higher take-up of agri-environment schemes which reflects the larger farms and focus on broadacre crops and livestock in these areas, as well as natural features.

Area	Countryside Stewardship	Environmental Stewardship	SFI23	SFI Expanded Offer	Total scheme area	Total parcel area	% under AES
Norwich and East Norfolk	9,100	3,400	18,800	10,700	34,900	54,700	64%
North and West Norfolk	36,300	4,640	86,600	49,200	141,000	204,000	69%
Breckland & South Norfolk	28,500	7,050	75,800	39,400	121,000	177,000	68%
Norfolk County Council	73,900	15,090	181,200	99,300	296,900	435,700	68%
Norfolk % of England	4.5%	2.2%	5.4%	5.6%	4.9%	4.5%	
England	1,634,213	686,636	3,331,653	1,771,535	6,100,324	9,751,488	63%

Norfolk has major agricultural challenges on peatland restoration (e.g. in the Broads), biodiversity, nutrient neutrality, carbon and water management, which will impact its agrifood sector.

The county is being proactive in tackling these challenges, led by strong partnership working within agriculture, as well as between the sector, research partners and wider business and public sector groups. This is supported by multiple local groups including the Broads National Park team, AONBs, Norfolk Rivers Trust, Norfolk FWAG and Norfolk Wildlife Trust, all of whom work closely with farms.

Supporting the AgriFood Industry

The scale of Norfolk's agrifood industry, and its history of being at the forefront of developments in the sector for centuries. This ranges from the Norfolk four-course rotation and agricultural improvements of Coke of Norfolk²⁴ and Turnip Townsend²⁵, through to Bernard Matthews transformation of the turkey sector. In all these transitions, Norfolk has developed and retains a strong research, support and innovation base which underpins the sector. Key local assets which support the industry include the:

Royal Norfolk Agricultural Association (RNAA)

One of the UK's leading agricultural associations, the RNAA runs England's largest two-day agricultural show, the Royal Norfolk Show in June each year, which attracted over 80,000 visitors in 2025 and is the Association's flagship event. In addition to the show, the RNAA run a full programme of events supporting the agricultural and rural community, most notably the annual Norfolk Farming Conference. The RNAA have

18 Wendling Beck | Nature Recovery Project, Norfolk

19 Oxwillow-BIODIVERSITY-CASE-STUDY.pdf

20 North Norfolk: Wilder, wetter, better for nature - Norfolk Coast

21 Save our chalk streams | Norfolk Wildlife Trust

22 Area under agri-environment schemes in England 2025 - GOV.UK

23 The total parcel area is the total combined area of all registered land parcels in that ITL3 area. This includes most agricultural area, but can also include some non-agricultural areas.

24 Lessons from the past: How modern Holkham farmers are reviving the principles of Coke of Norfolk | Eastern Daily Press

25 Sustainable Farming in Norfolk | Raynham Estate Agriculture

The UK's largest agrifood R&D Centre

30,000+ staff

researchers and students are based at Norwich Research Park

£200 million

raised by a cluster of agritech businesses at the campus in the past 5 years

also supported and hosted the annual Norfolk Landscapes Conference since 2024, an event focused on environmental management and delivery in line with Norfolk's leadership role having hosted the first environmental improvement schemes in the UK in the 1980s in the Broads.

The showground also hosts multiple other RNAA and third-party events during the year and now includes the recently completed Norfolk food hall and café, which showcases locally produced produce from across the county.

The Food and Farming Discovery Trust (FFDT) run by the RNAA supports education on agriculture and the countryside in the community, and also supports the YIELD network which offers a programme of educational meetings and events for almost 300 young professionals in agriculture to support their continued career progression. The full details about the Society and its work to support the industry is available at: www.rnaa.org.uk

The Norwich Research Park

Norfolk hosts the UK's largest agrifood R&D centre at the Norwich Research Park (NRP). NRP includes multiple innovation centres, with more than 3,000 full time researchers, and over 30,000 staff, researchers and students. The park hosts three of the BBSRC's eight core funded research centres²⁶ including the:

- John Innes Centre | Excellence in plant science, genetics and microbiology: the global leader in plant genetics, and an international centre of excellence in plant science, genetics and microbiology. It's internationally significant research assets include the GRU (Germplasm Resource Unit²⁷) which since 2012 has been the British Biotechnology & Biological Sciences Research Council's (BBSRC) national capability crop seed bank.

- Quadram Institute: researches food science, gut biology, human health and disease, to understand how food and the gut microbiota are linked to the promotion of health and the prevention of disease, with an emphasis on diet- and age-associated diseases. Quadram's unique assets includes the national collection of yeast cultures²⁸.
- Earlham Institute: furthering the understanding of human, animal and microbial genomes with its multi disciplinary expertise in the life sciences with engineering, computational science, and biotechnology.

NRP is also home to the:

- The Sainsbury Laboratory which with 120 staff and students is focused on applied scientific research into plant-microbe interactions with the goal of reducing crop losses to diseases and pressures, especially in emerging markets more at risk of food insecurity.
- BBRO (British Beet Research Organisation) which supports sugar beet growers and the wider industry to improve crop varieties, management, quality and ultimately yield. Working with the region's growers, BBRO has supported the sector to increase yields by more than a quarter in the past 20 years.
- The University of East Anglia is a leading regional research university with particular strengths in biological and geographical sciences. Its agricultural focused innovation includes the Agri-tech Global Programme²⁹ and the EPSRC Agri-Forwards centre for doctoral training³⁰ which are both run in collaboration with the University of Lincoln and University of Cambridge.

²⁶ Strategically supported institutes – UKRI

²⁷ Germplasm Resource Unit (GRU) | John Innes Centre

²⁸ More than bread and beer: the National Collection of Yeast Cultures - Quadram Institute

²⁹ Agri-tech funding boost for regional university partnership | UEA

³⁰ Agri-FoRwArdS - EPSRC Centre for Doctoral Training in Agri-food Robotics

NRP also hosts a growing cluster of agritech businesses, now about 50 companies, some just starting up and others that have matured into high growth international businesses employing over 100 people. With over £200m raised by these companies in the last 5 years³¹, the success of the park includes breakout companies such as Tropic, which has been based at the campus for ten years and has grown from three employees to around 150. Over the last five years Tropic has raised a total of £142m to fund its R&D.

Norfolk Agricultural Support Base

As well as the Norwich Research Park, Norfolk has other important business cluster, educational, innovation and research assets including:

- Norfolk Food Enterprise Park (FEP)³²: this 100-acre site adjacent to Easton College is a dedicated business park for the agrifood sector. It houses major business including Condimentum, Fischer Farms (UK's largest vertical farm), a wine wholesaler, and Broadland Food Innovation Centre to nurture small early-stage food companies.
- The Morley Agricultural Foundation (TMAF): a charity supporting agricultural research, education and career progression across the east of England. It includes a working 750-hectare research farm, which since 2024 has been an AHDB strategic cereal farm and supports trials for research institutes such as BBRO, the John Innes Centre, and NIAB, as well as working with major agri-input suppliers such as BASF, Bayer and Agrovista.
- Easton College, part of City College Norwich Group, is an established specialist land-based education provider forming part of the wider Norwich innovation and education cluster alongside the RNAA, NRP, Norfolk FEP, and TMAF. It offers a range of further education courses within agriculture and operates a more than 100-hectare college farm with livestock and crop enterprises.

31 Norwich Research Park companies pass £200m investment milestone - Norwich Research Park

32 Home - Food Enterprise Park Food Enterprise Park

33 Broadland Food Innovation Centre

Want to know more? Find the details behind the headlines, get tabulated data, explore our sources and get more information about the Norfolk organisations supporting the UK's food supply chain at ruralpolicygroup.com/resources





Lessons from the Global Permacrisis

Recent international crises including the Russian invasion of Ukraine, Iran conflict, and the Covid pandemic, as well as other international disruptions and extreme weather events have caused significant uncertainty and disruption in the agrifood chain over the last 5 to 6 years. The resultant 'permacrisis' means supply chains are prioritising resilience and focusing on margin protection.

Uncertainty and disruption have led to and are continuing to generate high food price inflation which has contributed to the cost-of-living crisis, high profile cases of food fraud, rising levels of food theft and temporary scarcities. Most notably food inflation peaked in March 2023 at 19%¹, though this overall figure hid a much larger rise in the costs of imported food, up by 29%, compared to 15% for UK sourced food. This demonstrates the importance of UK sourcing for reducing UK food inflation, and for improving food security. Simultaneously, UK policy has undermined confidence to invest in UK production and threatens a contraction in the asset base, leaving consumers more vulnerable to price fluctuations over the longer term.

High food price inflation has been generated both by disruptions to the supply of key food stuffs such as black sea grain, but also through disruption to the price

and supply of key ingredients and resources which farmers use to grow the foods we consume. The most important price pressures include energy, fertilisers (many of which are produced from natural gas), agrichemicals (primarily from petrochemicals), CO₂ (for food processing, primarily produced as a fertiliser by-product) and food logistics (heavily influenced by energy costs).

Norfolk has significant expertise in seeking to respond to these challenges. Where possible, farmers have been reducing their input usage and improving the accuracy of applications to minimise the fertiliser and agrichemical use of each tonne of product produced. Companies and cooperatives such as Dewing Grain or Yaregrain have implemented the use of grain colour sorting to better optimise the value of the products produced, by sifting grain into value categories, enabling a higher proportion of output to be used for high value products such as milling flour.

Innovation has included water management, with Norfolk growers pioneering the use of drip irrigation in crops such as potatoes, which both reduces water use (by 40% in a 2022 Norfolk trial²) and energy consumption to operate irrigation pumps. Drip irrigation can also improve crop quality and yield, enabling higher productivity and therefore lower the input cost per unit output. This deployment of drip irrigation has also included trials in the use of recyclable irrigation tape which reduces supply chain risk and environmental costs³. The technology delivers water and nutrients directly to roots, helping conserve

1 Food and energy price inflation, UK - Office for National Statistics (ons.gov.uk)

2 Sustainable solutions: Netafim's drip irrigation shows significant benefits for potato farmers and the environment – Potato News Today

3 Recyclable irrigation system trialled by water-conscious farmers Eastern Daily Press

resources, mitigate post-harvest losses and ensure consistent yields in spite of climate shocks. It is building supply chain resilience from the foundations up.

Central to the industry's ability to navigate higher costs is continued investment in modern infrastructure and investment in technology.

UK productivity has continued to grow in agriculture⁴, and from 1973 to 2024 the industry achieved annual productivity growth of 0.55% and total factor productivity growth of 0.81% per annum as input consumption declined over the period. Productivity growth was driven by:

- Labour productivity growth of 1.81% per annum.
- Growth in land productivity (yield) of 0.66% per annum (crop or livestock output per hectare).
- Growth in intermediate consumption productivity of 0.46% per annum (tonnes of output per unit of fertiliser, seed, livestock feed etc).
- Capital consumption productivity growth of 0.08% per annum.

The result is a sector which is more productive and supports much higher value jobs than in the past, with Norfolk at the forefront of these transitions.

“Continued agritech adoption and investment is critical for Norfolk’s farms and food sector, and policy support to enable more rapid adoption of technology is still needed”.

Martin Collison Advisory Council Member, Rural Policy group

This includes more help to increase skills levels, updated regulation to enable use of new technology e.g., crop spraying/fertilising drones, autonomous vehicles, new sustainable fertilisers, and tax and financial support such as continued Farming Equipment Technology Fund (FETF) support to help businesses innovate and adopt technology.

Similarly, within processing and distribution similar pressures have contributed to cost inflation, concentrated on energy costs, material costs and labour costs, including changes in payroll taxes and minimum wage levels. Norfolk’s agrifood sector continues to respond to these challenges through investment in modern capital equipment to reduce energy demand, a strategy mirrored by food businesses throughout the UK.

For example, Wissington Sugar Factory is now recognised as the world’s most efficient sugar facility and has seen continued investment, most recently a £50 million investment in steam drying⁵. It has also championed a zero waste approach for decades, with every part of the sugar beet, the soil and stones which arrive with the beet, and other inputs such as energy, forming part of a circular economy model in which all ‘wastes’ are reused or repurposed.

While the global network remains an integral part of the UK’s food supply by providing consumers with more choice, the food system can be safeguarded from geopolitical shocks by leaning into domestic food supplies, investing in sustainable production and restoring confidence to business with clear, stable, long-term policies.

⁴ Total factor productivity of the agricultural industry - GOV.UK

⁵ British Sugar announces biggest decarbonisation project ever at Wissington factory during its centenary year | News



Water is Mission Critical

Water management is mission critical to Norfolk's agricultural sector and success due to the county's focus on higher value crops and the pressures which come from climate change, growth and ambitions to reduce the impact of water abstraction on the natural environment. As one of the driest counties in England, Norfolk has a pressing need to manage water constraints and is a testbed for scalable solutions.

While nationally the proportion of farmland irrigated is low, World Bank estimates just 0.4% of the UK's agricultural land is irrigated¹, use of irrigation is much higher in Norfolk and the Water Resources East (WRE) region given the focus on high value crops where it is c.10% of current use. As a result, many Norfolk farms are under pressure to reduce summer abstraction and move to reservoirs to store winter and peak flow water.

Intensive livestock, in which Norfolk is a UK leader, also has high water demand. For instance, it is estimated that 1,000 laying hens will consume 200 litres of water per day, while intensive broilers consume 6 litres of drinking water over their lifetime². The 2026 Pork Environmental Roadmap³ estimates that per kg of pork produced, UK farmers have used between 0.53 and 0.86 M3 over the last two decades.

Intensive vegetable and root crop production can require large volumes of water. Cranfield University's D-Risk⁴ tool estimates that in North Norfolk crops such as maincrop potatoes planted in March require an average of 2,330M³/Ha, rising to 3,130M³/Ha in dry years (estimated as 5th driest year in 20 years⁵). Brassicas such as cauliflower planted in the same month for summer/autumn harvest will require an average of 2,320M³/Ha, and 2,980M³/Ha in dry years.

Knox et al (2020)⁶ reported that for food crops 'most irrigation is used to supplement rainfall on potatoes (54%) and outdoor field vegetables, such as carrots, onions, parsnips, and salad crops (31%). Some water is used on soft (e.g. strawberries) and orchard (e.g. apples, pears) fruit, sugar beet, and occasionally on cereals and grass'. Their report highlights North Norfolk and the Brecks as the most intensively irrigated regions in the country.

The Water Resource East (WRE) 2023 Regional Water Resources Plan⁷ notes that 'Projections are uncertain, but at the upper end, water needs for irrigation could more than double by 2050'. However, current demand for spray irrigation is not uniform across the year, with 'On average, peak summer abstraction for irrigation is around 350 MI/d, and this can almost double in a dry year to around 600 MI/d when crops are in need'.

1 Agricultural irrigated land (% of total agricultural land) | Data

2 Advice on efficient and safe drinking water systems for poultry - Farmers Weekly

3 The Pork Environmental Roadmap | AHDB

4 Crops2 : D-Risk

5 This 80% dry year calculation is the irrigation need which Cranfield recommend that farmers and engineers use when calculating reservoir capacity needs, and when applying to the EA for abstraction licenses.

6 Knox, J.W., Kay, M.G., Holman, I.P., and Hess, T.M. 2020 | Irrigation water strategy for UK agriculture and horticulture | UKIA

Water to support high value cropping and intensive livestock is essential for Norfolk because the UK's water footprint is significantly lower than imports.⁸ Research estimates that the production of high value crops requires 73% less irrigation in the East of England than in Spain, from where the UK sources circa a third of its fresh produce imports from a severely water stressed region.

In intensive livestock, the Pork Environmental Roadmap (2026)⁹ reports that 'British pig producers are making significant progress in improving water-use efficiency. Historically, UK pork had a water footprint 79% lower than the global average for pork production, positioning the sector well to demonstrate leadership in responsible water management'.

Onshoring production is essential for food security in an increasingly water stressed world and would support economic growth in Norfolk and across the UK.

Norfolk has been at the forefront of novel solutions to water stress in a changing climate. Examples of innovative thinking include Centre Farm, Fakenham run by the Savory family, which during the 2022 drought used spent water from processing¹⁰ meat and vegetables to irrigate approximately 30 hectares of grassland for forage production. This supported their deer, sheep and beef livestock enterprises, applying more than 30,000 cubic metres throughout the spring and summer. This enabled the farm to survive without needing to decrease stocking rates.

Other farms, such as the Stody Estate which operates in the high irrigation intensity region of North Norfolk, began constructing large-scale reservoirs in the 1990s in order to diversify their enterprises into intensive high value vegetable and root crop production. More recently this foresight has enabled low intensity irrigation to support the production of higher yield, higher quality cereal crops¹¹.

Elveden Farms, the UK's largest producer of onions, based near Thetford, has invested in new irrigation reservoirs, as well as trialling drip irrigation technologies for onions in the UK¹², supported by intelligent soil moisture sensors.

The pressure on water supplies and need to develop solutions is the focus of Norfolk Environment, Food and Farming (NEFF)¹³ which has championed sustainable

abstraction by hundreds of farmers since 1997. NEFF comprises 134 mainly Norfolk businesses, along with some from Suffolk and Lincolnshire, who collectively hold 255 licences to abstract 17 million m³ per year, equivalent to around 46 million litres per day. It was initially established to help Broadland abstractors understand new EU water regulations and the Environment Agency approach to changing licences in areas close to sensitive environmental areas.

Improved water management is also needed to protect Norfolk's internationally important habitats, including 10% of the world's chalk streams, significant areas of lowland peat in the Broads National Park and parts of West Norfolk Fens.

Innovative water management pioneered in Norfolk also includes wastewater treatment solutions such as the Ingoldisthorpe Water Recycling Centre, Anglian Water's first nature-based water treatment works which is paying a farmer to deliver a nature-based solution to secondary treatment of wastewater. Water passes through a constructed wetland before entering the River Ingol chalk stream, allowing natural biological processes to remove nutrients and improve water quality.

Anglian Water in collaboration with Water Resources East, the Nature Conservancy and Norfolk County Council have also developed the Norfolk Water Strategy Programme to champion nature-based solutions to water management. **This programme estimates that every £1 invested across Norfolk in nature-based solutions for water management can deliver £6.70 of benefits.**

Norfolk needs to continue to invest in farm reservoirs, improved irrigation systems and water efficiency in the food chain. To enable this support from government is needed including:

- A more responsive and modern abstraction licensing/permitting system which recognises the benefits of supporting UK crop and livestock production.
- A streamlined planning process for water infrastructure to accelerate the construction of water management assets which help manage water in a changing climate.
- Financial and/or taxation incentives to encourage continued investment in water management.

7 WRE-Regional-Water-Resources-Plan-for-Eastern-England.pdf

8 Mekonen MM, Hoekstra AY (2010), The Green, Blue and Grey Water footprint of crops and crop derived products, Value of Water Research Report Series No 47, UNESCO-IHE Appendix II. Water footprint per ton of crop or derived crop product at national and sub-national level (m³/ton) (1996-2005) HESS - The green, blue and grey water footprint of crops and derived crop products

9 The Pork Environmental Roadmap | AHDB

10 Livestock farm struggles after just four inches of rain in five months | Fakenham & Wells Times

11 Dry spring weather tests Norfolk farm water strategies | Eastern Daily Press

12 UK estate trials drip irrigation for onion production

13 Home | NEFF - Norfolk Environment Food & Farming

Calls to Action



The most important change we can make is how we value water. Water resilience should be framed not as environmental compliance, but as a driver of productivity, food security and export competitiveness.

An investment in water management is an investment in productivity and economic growth: every £1 invested across Norfolk in nature-based solutions for water management can deliver £6.70 of benefits.

Further, as climate pressures intensify and water scarcity constrains output in traditionally productive regions, countries that can reliably produce water-intensive goods will hold a structural advantage. With the right approach, water stewardship could evolve from a resilience measure into a source of competitive advantage, positioning UK plc to attract global buyers and foreign direct investment (FDI), and capture greater export value in crops and agricultural commodities as scarcity reshapes global markets.

Delivering a modernised water infrastructure requires public-private collaboration, including R&D support, financial and tax incentives to encourage continued investment, streamlined planning processes to accelerate construction projects, greater alignment between the relevant government agencies and most crucially, elevating water to the same strategic tier as energy.

Alongside the foundational importance of water, greater resilience and productivity can be built into the food system and the businesses within it with:

- 1 Strengthened food security ambitions to reach 70% self-sufficiency.
- 2 Improvements in supply chain fairness and greater collaboration between trading partners.
- 3 Longer-term policy initiatives and policy stability to facilitate investment and planning; durations need to extend beyond farm lifecycles and payback periods.
- 4 Monitoring of the impacts of the 2026 changes to Agricultural Property Relief and Business Property Relief on investment levels and capital employed in food production, with the possibility of a review if it is having a detrimental effect on the asset base.
- 5 Develop standardised baselines and verification systems for environmental data to stimulate confidence among investors, banks, regulators, consumers and other stakeholders committed to green economic growth.

Every £1 invested across Norfolk in nature-based solutions for water management can deliver £6.70 of benefits.

Unlock the benefits of Rural Policy Group

Join us on our shared mission

Rural Policy Group was founded in 2019 to support the financial and environmental sustainability of the agrifood supply chain. This central tenet is underpinned by:

- Fair value in the food supply chain
- Food security grounded in self-sufficiency and a considered approach to imports
- Sustainable accounting as standard
- Stimulating investment and profitability in farms and other food businesses
- Recognition of green actions as a valued and valuable commodity

Why become part of the community?

Together with our members, Rural Policy Group creates dialogue and stimulates impactful change to better the environment for Britain's food businesses, from fertilizer to fork to framework. We believe vertical collaboration and uniting businesses at all stages of the agrifood supply chain, its professional partners and allied industries is the best way to achieve thriving businesses and a more sustainable food system.

- > **CONNECT** Bringing people together and creating space for conversation
- > **INSPIRE** Cultivating a forum for inspiration, business development and reciprocity
- > **INFLUENCE** Inform policy to create a better operating environment for food businesses
- > **LEARN** Supporting business to understand and adapt to policy changes



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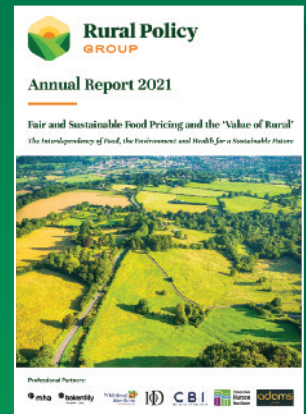
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Rural Policy Group serves to enhance the financial and environmental sustainability of the agrifood supply chain.

We bring together inspirational partners spanning the triple helix of education, politics and industry to help businesses adapt to changing policy frameworks and market conditions. And we further dialogue with policy decision-makers to shape the business environment for farms and food businesses.

Learn more about what we do, our impacts and future initiatives for our members and the wider agrifood industry.



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