# A National Food Strategy for Sweden – more jobs and sustainable growth throughout the country

Short version of Government bill 2016/17:104

Government Offices of Sweden Ministry of Enterprise and Innovation

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#### More food can be produced in Sweden

The global population is growing and we all need to eat. The demand for food is increasing, both in Sweden and worldwide. The food we eat must be produced somewhere: the question is where and how.

The Government believes in Sweden's rural communities and Swedish food industry and is convinced that more food can be produced in Sweden. We have the necessary expertise and innovative capacity, we are environmentally aware, we have a high level of animal welfare and have the lowest use of antibiotics in the EU. Furthermore we have excellent access to high-quality natural resources. However, we face major challenges such as low profitability in several sectors and tough international competition but also global challenges such as climate change and environmental problems.

We need a comprehensive policy to support Sweden in its role as a competitive food-producing nation on a global market. Therefore the Government has for the first time put forward a Food Strategy, which involves the entire food supply chain. The strategy will lay the foundation for long-term development – from the crops in the fields to the dinner tables in homes, to school meals, restaurants and world-wide.

A strengthening of the competitiveness throughout the food supply chain will create more jobs, sustainable growth and values such as open landscapes and lively rural communities. A long-term Food Strategy will help to ensure that the potential of the entire Swedish food supply chain is fully realised. This means increased, sustainable production of food for Swedish and oversea markets, which could lead to higher growth rates and more jobs throughout the country. The Food Strategy will also lead to an increase in the share of locally produced products and of organic food as well as greater opportunities for consumers to make informed choices.

The Food Strategy is a platform that sets out the direction of our policy towards 2030, to create stability and ensure a long-term approach. Concrete measures are put forward in the Government's action plan stemming from areas identified in the strategy. Some, but not all, of the actions can be realised by the Government. To be successful, the entire food supply chain need to work in the same direction, where as many as possible are contributing. With the Food Strategy as foundation, we will be able to meet the challenges facing us and strengthen the Swedish food supply chain.

5.9/4

Sven-Erik Bucht Minister for Rural Affairs

Polarbröd is Sweden's third-largest bread producer, with 342 employees mainly working at the three bakeries in Älvsbyn, Bredbyn and Omne. 1111

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### Introduction

The Government believes that food production and the food supply chain in Sweden are well placed to contribute to society in the form of employment, sustainable growth and public goods. An overall, long-term strategy for the food supply chain will also help to create a competitive food production industry in Sweden for the future.

The Food Strategy should be seen as a platform that will shape our food policy until 2030. It sets out a framework for continued work on developing a competitive, sustainable food supply chain leading up to 2030, aimed at the entire food supply chain. Having long-term goals for our food policy will help to create stable conditions for the food supply chain. The Government has proposed overall objectives as well as three strategic objectives in particularly important areas. The Food Strategy thus sets out goals as direction for our food policy and includes objectives to be achieved and a structure for implementation. Actions and measures taken by the food supply chain itself are also crucial to the success of the strategy. Successful implementation of the strategy requires commitment and input from companies, organisations and stakeholders throughout the food supply chain.

Jeanette Blackert is a pig farmer in Skänninge, Östergötland province, who raises pigs from piglet to slaughter.


### Why we need a Swedish food strategy

A long-term food strategy is important for fostering a competitive food production industry in Sweden. The strategy covers the entire value chain, from primary production to the consumer, and will help to ensure that the potential of food production in Sweden is fully realised. Food production in Sweden is relatively eco-efficient and climate efficient and has high standards in animal welfare and health. Climate change is set to make the production of food more difficult in some parts of the world. The Government therefore believes that it is vital to make the most of opportunities to produce food where conditions are favourable and thus reduce the impact of production on climate change. Food production in Sweden is marked by its high standards in respect of the environment and climate care, which are essential for achieving several of Sweden's environmental quality objectives.

However, the impact of Swedish food production on the environment is not only a positive one – other effects such as nutrient leaching and climate impact, increasing levels of resource efficiency are necessary to guarantee sustainable development.

Agriculture, forestry and fisheries have an obvious role to play in the transition to a green economy and in helping to ensure that Sweden can respond to future social challenges. The Government believes that in order to be able to contribute to the transition to sustainable development, food production in Sweden needs to be competitive and able to meet the challenges of an increasingly tough global market. Having a viable domestic food production is also a strength in terms of crisis preparedness.

The demand for food and primary agricultural products in Sweden and the rest of the world is expected to continue to increase due to population growth and higher levels of prosperity. Interest in healthy and safe food as well as food produced in a sustainable way constitute an important and growing part of the market, which also benefits Swedish food exports. These exports also contribute to the general economy. The Government is of the view that the prosperity of our country is dependent on our exports.

In recent years, the Swedish food production industry has found it increasingly difficult to compete on the global market. Many other countries have also drawn up and agreed on objectives and strategies for food production. This is probably one of the reasons why competition on the Swedish food market has intensified. If the level of food production in Sweden remains the same or falls, the benefits that production brings will not be achieved to the extent demanded by society. Productivity levels in the Swedish primary production industry need to develop at the same pace as in the rest of the world. The fact that

costs for certain inputs and labour are higher than in comparable countries accentuates the need for improvements in productivity. Business development and structural transformation are important aspects of this.

The strategy will help to ensure that the potential of Swedish food production is fully realised. This means that we must put measures in place to ensure greater production for both the domestic and overseas markets, higher levels of growth and employment in relevant industries, increased production and consumption of organic food, and better opportunities for consumers of all backgrounds to make informed choices. Informed and conscious choices include choices on the basis of factors such as health, sustainability, origin and ethics. Our aim in producing a Food Strategy is to foster a competitive food production industry in Sweden, thereby increasing innovation, employment, profitability, production and exports while achieving the relevant national environmental targets.

### Vision 2030

The Swedish food chain in 2030 is globally competitive, innovative, sustainable and attractive to operate within.

#### The overall objective

The overall objective of the food strategy is a competitive food supply chain that increases overall food production while achieving the relevant national environmental objectives, aiming to generate growth and employment and contribute to sustainable development throughout the country. The increase in production – of both conventional and organic food – should correspond to consumer demands. An increase in production of food could contribute to a higher level of self-sufficiency. Vulnerability in the food supply chain will be reduced.

#### Objectives for strategic areas

Rules and regulations

Rules and regulations should be designed to support the overall objective of a competitive and sustainable food supply chain in which production increases. This should be achieved by means of appropriate taxes and charges, regulatory simplification, a reduced administrative burden and other measures to strengthen competitiveness and profitability.

# Consumers and markets

Consumers should have a high degree of confidence in food and be able to make informed and sustainable choices, for example with respect to local and organic production. The market for food should be characterised by efficient competition. Swedish food exports must be given the opportunity to grow so as to meet demand in relevant markets.

# Knowledge and innovation

The objective for the strategic area 'Knowledge and innovation' is to support the knowledge and innovation system so as to contribute to increased productivity and innovation in the food supply chain and the sustainable production and consumption of food.

# Food Strategy structure of objectives

# Our vision for the Swedish food supply chain

By 2030, Sweden will be employing its productive resources efficiently and sustainably. Our starting point is the Swedish environmental objectives system and the generational goal of delivering to the next generation a society that has solved the major environmental problems without exporting such problems to other parts of the world. Food production has a significant role to play in Sweden's and the rest of the world's transition to a sustainable society. Food production is carried out with high ambitions in relation high standards in respect of the environment, climate, health, animal welfare, and continued low-level usage of antibiotics, food quality and safety.

By 2030, food production in Sweden is competitive. Steadily rising production values and cost-efficiency in food production are evidence of this. Improved productivity and successful commercialisation of the existing Swedish strengths create profitability in the various sectors. Businesses in the food supply chain help provide employment throughout the country. The sector provides employment in urban as well as rural areas, for people originating from Sweden or other countries and ranging widely in

terms of age, gender and previous experience including many immigrants. It is easy to recruit workers with the right skills in the various sectors of the food supply chain, and skills requirements are easily satisfied. New business opportunities and complementary activities also help to boost the diversity of rural industries.

Regulations relating to food production are perceived by operators as appropriate and easy to follow, helping to create the right conditions for growth in all aspects of the food supply chain. The development and application of new regulations consider the need for businesses to be competitive without compromising on important aspects such as consumer interests, animal welfare and environmental considerations. A defining characteristic for the knowledge system in the food supply chain is a high level of international collaboration. Needs-driven research is of high international quality, and there is a great deal of cooperation and collaboration between the industry and academia. Sweden plays an active role in food-related research and is a role model for innovation in the food sector and the sustainable production and consumption of food.

Exports are strong and increasing and involve a large number of products, countries and exporters. Swedish products are in demand in both the overseas and domestic markets. Sweden offers pleasing culinary experiences for both domestic and overseas visitors. Organic food production is a dynamic market that is growing and developing, and production is meeting consumer demand.

In short, in 2030 the Swedish food supply chain will be globally competitive, innovative, sustainable and an attractive sector to operate in.

# The objectives of the Food Strategy

A long-term strategy should be open to the possibility that conditions for production and patterns of consumption will change in the future, and stated objectives must be sufficiently general to accommodate this.

#### Overall objectives

The overall objective of the food strategy is a competitive food supply chain that increases overall food production while achieving the relevant national environmental objectives, aiming to generate growth and employment and contribute to sustainable development throughout the country. The increase in production – of both

Digitalisation presents opportunities for the food supply chain. For example, consumers can use a mobile app to quickly get information about a product, including details of its geographic origin. On 25 February 2016, the Government mandated the Swedish Board of Agriculture to work closely with the Swedish National Food Agency to promote digital innovation by making information in the food supply chain available for purposes such as highlighting sustainability issues and increasing competition within the sector. This work will continue until 2018. ite skivad

conventional and organic food – should correspond to consumer demands. An increase in production of food could contribute to a higher level of self-sufficiency. Vulnerability in the food supply chain will be reduced.

A national Swedish objective to increase food production will help to create and communicate the long-term conditions for food supply chain businesses to develop and grow and increase incentives for businesses to invest in Sweden. Swedish companies now operate on an open, international market in which many competing countries have explicit strategies to optimise growth in food production.

If Sweden is to make the most of the social benefits public goods and potential for growth and employment that increased food production will bring, we need a stated goal for increased production. A goal will provide the basis for the future development of the food supply chain and help to give businesswomen and men and those operating in the food supply chain confidence in the future. The Government's 2016 budget proposal asserted that the increase in production must occur alongside with the realisation of the relevant environmental quality objectives. Swedish food production is characterised by high standards in respect of the climate and the

environment. Increased levels of food production can help achieve some of the environmental quality objectives. Assuming growth takes place in a sustainable way that makes efficient use of resources, food production will have both positive and negative impacts on the environment.

Objectives for strategic areas

The Government proposes that the strategy covers three strategic areas. These strategic areas are: Rules and regulations; Consumers and markets; and Knowledge and innovation. These areas correspond well to those in which initiatives are required in order to enhance the competitiveness of the food supply chain and to increase levels of food production.



# Three strategic areas

### Rules and regulations

Objective: Rules and regulations should be designed to support the overall objective of a competitive and sustainable food supply chain in which production increases. This should be achieved by means of appropriate taxes and charges, regulatory simplification, a reduced administrative burden and other measures to strengthen competitiveness and profitability.

The design of rules and regulations is crucial to the way in which society and the economy function, their efficiency and how resources are allocated. 'Rules and regulations' refers to legislation created through policy in various areas as well as industry self-regulation. Rules and regulations in an individual industry or sector affect the capacity of that specific sector to develop. Swedish food producers operate in a market that is subject to tough competition, both nationally and internationally. Food production is affected by several policy objectives, and the rules and regulations that govern production derive from several policy areas. The design of rules and regulations therefore has a major influence on the conditions for starting, running and developing businesses in the food supply chain. If we are to achieve our objective of a competitive food supply chain with an increasing level of production, employment opportunities, growth and sustainable development, rules and regulations need to be designed taking these aspects into account.

The Government has included the following assessments in the strategy:

- Regulations and other policy instruments that affect businesses should be designed to support increased productivity and competitiveness in the food supply chain. Efforts to achieve simplification for businesses should continue to be of high priority.
- There should be an investigation into how relevant authorities can better address improved competitiveness for businesses. The work of providing services and accessible information relating to the rules and regulations affecting businesses should continue to be developed.
- It should be made easier to effect structural changes in the agricultural and horticultural industries, and businesses should be able to operate through efficient legal structures irrespective of size. Legislation relating to land acquisition should be reviewed.
- There needs to be continued development and coordination of public controls of businesses operating in the food supply chain. These controls should be comparable across the country and characterised by a high

level of expertise. As far as possible, they should be coordinated and cause business owners as little disruption in their day-to-day operations as possible. High levels of knowledge and good exchange of information should be encouraged in order to create a climate of trust between the enforcement bodies and those who are the subject of controls.

- With its natural resources, Sweden is well placed to develop a sustainable system of food production that can both meet the global demand for food and help to address climate-related and environmental challenges. A coherent and systematic approach is needed to enable Sweden to meet the UN's Sustainable Development Goal of halving per capita global food waste by 2030.
  - Increasing production of food in Sweden, including organic produce, requires businesses to have access to productive land and water resources. As part of the spatial planning process, account must be taken of the needs of agricultural production alongside other interests in society. Soil fertility on agricultural land should be maintained and developed. Expertise in the area of land draina-



Svegro AB grows and sells vegetables such as fresh herbs, lettuces, root vegetables and potatoes, supplied all year round to wholesalers, food stores and restaurants. Based on Ekerö island, Svegro has a wide range of products with environmental certification and products that meet the requirements of the KRAV, SMAK and Svenskt Sigill quality marks.

ge and management of water within the landscape should be enhanced.

- There should be a continuation of the positive developments in Swedish crop production, in line with the planned increase in sustainable food consumption.
- Long-term, sustainable, competitive agricultural and horticultural production throughout Sweden requires access to suitable varieties of crops and plants throughout the country. New technological methods and innovations should be used to safeguard access to local and regional varieties and also to help maximise the use of production resources and ensure that agriculture adapts to a changing climate.
- A sustainable plant health regime is essential if Swedish crop production is able to be competitive in the global market. Effective, sustainable prevention

and control measures are required to manage both established and new plant pests. There is a need for good access to plant protection products that can effectively manage the pests that affect crops while minimising the risks and consequences for human health and the environment. This applies both to chemical and biological plant protection products and to other alternative methods. There must be an efficient authorisation procedure for plant protection products.

 Profitability in livestock production needs to be boosted, for example by increasing productivity so as to increase production. Increased levels of livestock production nationally can lead to increased consumption of Swedish meat. At the same time, Sweden must continue to set high standards in terms of animal welfare and health. Sweden should continue to work to raise standards of animal welfare in the EU. Work on developing the regulatory framework in respect of animal husbandry should continue. Work on reducing the effects of livestock production on the climate and the environment should be enhanced. A scientific council for animal welfare issues should be established.

- Seafood and marine resources have the potential to meet increased demands. Areas of water should be made available for sustainable aquaculture, such as fish, shellfish, oyster and mussel farms, so as to strengthen the Swedish aquaculture industry.
- The production of game and reindeer meat can help to create growth in the food supply chain. There should be easier access to markets.

#### Consumers and markets

Objective: Consumers should have a high degree of confidence in food and be able to make informed and sustainable choices, for example with respect to local and organic production. The market for food should be characterised by efficient competition. Swedish food exports must be given the opportunity to grow so as to meet demand in relevant markets.

The Government's objective for competitiveness is well functioning markets with efficient competition in both the private and the public sectors which benefits the consumer. A market with efficient competition without unnecessary barriers that prevent new companies from entering the market leads to more efficient businesses with the opportunity to grow, thus forming the basis of sustainable growth and increased prosperity.

Efficient competition also means that consumers have a broader choice and that the market is able to meet consumer demand for food, for instance with respect to specific requirements in terms of health, origin and sustainability.

The food supply chain is made up of numerous links and connections, and there are many dependencies between these links. The ways in which these connections function and develop and how competition works between and within the links have a major impact on the competitiveness of the food supply chain. In its report, the Swedish Competition Authority identifies failings in the way the market in food operates, due partly to the fact that, historically, Swedish food production has focused heavily on the national market. The Government believes that it is important for the market in food to be characterised by well-functioning competition.

Moreover, consumer confidence in Swedish food is important in order to make increased food production possible. The qualities associated with Swedish food and the ability of food businesses to be innovative and adapt to consumption trends are important in terms of how consumers view the Swedish food industry. Consumers make choices partly in response to the information they encounter about food. The Government believes that the market in food must correspond to the demands and information requirements of consumers. It is important for the Government that consumers continue to have a high level of confidence in food on the Swedish market and are able to make informed choices.

Swedish food production is known for high safety standards throughout the food supply chain, leading to safe high-quality products. It is the Government's opinion that Sweden should exploit its strengths in the food production sector more extensively so as to facilitate exports. Successful exports and a strong domestic market are closely linked. Increased exports can also help to enhance competitiveness on the domestic market. The Government therefore believes that there should be an increase in the export of Swedish food.

The Government has included the following assessments in the strategy:

Whatever their socioeconomic group, consumers should have the opportunity to make informed and conscious choices about their food. The relevant authorities should continue to play an important role in compiling and disseminating information about safe food, good eating habits and sustainable food production.





School lunches for children at Fornudden School in Tyresö municipality are no ordinary meals. The food is often vegetarian and often involves locally-produced, organic ingredients. Above all, food is fun! The school won the Arla Golden Cow award for the school that takes the most pleasure in food.

The provision of voluntary information is useful in helping to meet consumers' needs and demands.

The public procurement processes should be used to better guide towards and respond to society's aspirations and laws. A Food Strategy for Sweden in relation to animal welfare and the environment. The expertise of contracting authorities and departments in the public procurement of food and catering services should be strengthened. It should be made easier for small and medium-sized suppliers to tender for public contracts for food and catering services. The aim is to increase the volume of organic food and services to be procured and to increase green public procurement with a lifecycle cost perspective. The public sector must seek to raise the level of knowledge about food production, food and meals, both generally and specifically among children and young people, ideally working in partnership with local food business operators.

 Well-functioning competition is essential for profitability and growth in the food supply chain. The Swedish Competition Authority should analyse competition and the functioning of the food production and food retail markets.

- A competitive food industry is important for sustainable growth and employment throughout the country.
- Increased exports and increased numbers of exporters can boost growth in the Swedish food supply chain. Initiatives promoting exports should continue to be developed.
- There is potential for meeting the demand for food and drink experiences as an integral part of the tourism industry.
- The production, consumption and export of organic produce should increase.



#### Knowledge and innovation

Objective: The objective for the strategic area 'Knowledge and innovation' is to support the knowledge and innovation system so as to contribute to increased productivity and innovation in the food supply chain and the sustainable production and consumption of food.

Society and industry are in constant need of new knowledge in order to develop and respond to the changes taking place in the world around us and societal challenges. New knowledge must also be disseminated and exploited. Education and skills supply must also be continuously developed and adapted so as to meet both businesses' labour requirements and the needs of the individual in terms of education and continuing professional development. The Government believes that a functioning knowledge and innovation system for the food supply chain is crucial to the future development, welfare and competitiveness of the country as well as various industries.

Innovation is vital to the longterm development of business productivity and thus to growth and future prosperity. Innovation means finding new or better ways to create value for society, businesses and individuals and new ways of responding to societal challenges. For sustainable food production, what we need in particular are the development of new and innovative products, creation of increased value in production and services, and new models and sustainable systems of production.

Another aspect crucial to this development of a functioning knowledge and innovation system, is that research results and new knowledge can be developed through partnerships between academia, educational establishments, industrial research institutes, businesses and other relevant societal stakeholders. Skills supply and advice must also meet the needs of businesses. Thus, to make it possible to meet the objective of increased food production with the aim of creating employment, growth and sustainable development, the Government believes that the knowledge and innovation system needs to be enhanced so that it can better contribute to increased productivity, innovation and sustainable food production and consumption.

The Government has included the following assessments in the strategy:

• There is a need for increased coordination within the knowledge and innovation system for the food supply chain. The stakeholders in the food supply chain need to take active responsibility for articulating their needs within the knowledge and innovation system.

- Applied and needs-driven research within the food supply chain is an important aspect of the Food Strategy.
- The innovation system should provide better support for the food supply chain's need for the dissemination and commercialisation of research results and new knowledge as well as growth of new knowledge-intensive stakeholders.
- Advice and skills development need to be developed as needs arise in businesses in order to strengthen levels of competitiveness and contribute to production that is sustainable in the long term. Advice and skills development initiatives are important for enhancing competitiveness in the food sector.
- Relevant education and training providers should continue to follow progress in the food sector and aim to meet the needs for skills in that area.

The Uppsala company Vegafish develops closed, land-based systems for fish and shellfish farming. Trials are currently underway on environmentally-friendly farming of jumbo prawns The concept uses waste heat to heat the farm ponds, sustainable feed and closed systems. The result is Swedish jumbo prawns produced using climate-smart methods.



# How the Food Strategy contributes to action on the environment

The starting point for the Food Strategy is the sustainable production of food. Enhanced competitiveness and increased levels of production must go hand in hand with work to achieve environmental objectives. An agricultural sector able to compete on the global market and survive is essential to the sector's contribution to the environmental objectives.

The Food Strategy requires the agricultural sector to undertake ongoing environmental progress. The strategy can assist environmental activity in the agricultural sector by fostering enhanced competitiveness and improved resource efficiency. Measures to improve productivity means less use of resources for production, a more resource-efficient production often means less impact on the environment per unit produced. Increased resource-efficiency without being detrimental to production is also a key factor to achieving the generational goal, the overall goal of Swedish environmental policy, of delivering to the next generation a society that has solved the major environmental problems without exporting such problems to other parts of the world. The solution is not to improve the environmental situation by reducing production but to increase the more environmentally-efficient production,

particularly production that has a low impact on the environment in global terms.

Grazing animals are crucial to maintain natural pasture lands that are home to large numbers of valuable species of Swedish flora and fauna. A competitive agricultural sector is necessary to uphold a production based on grazing. There are, therefore, strong and positive connections between increased food production and the Swedish national environmental objectives 'A Varied Agricultural Landscape' and 'A Rich Diversity of Plant and Animal Life'. To create growth and employment in a sustainable way, well-balanced measures are needed, that take into account the impact on environmental objectives. The work and recommendations of the OECD on green growth for the agriculture and food industries can be instructive in terms of how to work with objectives for both growth and sustainability. In this context, it is important to follow developments in employment and economic growth along with how these developments affect the environment.

Effective use of agricultural products is also a key factor in a sustainable society. Waste must be reduced throughout the food supply chain - from producer to consumer. Clever solutions should be found for the use of production residues in ways that stimulate a closed-loop system so that they constitute a resource in a growing circular, bio-based economy. There is great potential for the agricultural sector to contribute to such an economy. The use of primary agricultural products to produce biofuels can substantially reduce greenhouse gas emissions. Sweden is spearheading the production of biofuels with a high greenhouse gas reduction. Continued efforts are needed to make greater use of the opportunities presented by agriculture, forestry and fisheries for action on climate change and to make agricultural production more climate-friendly. The sustainability of the food production industry of tomorrow must be more evolved than it is today. Research and increased knowledge on new production methods, new plant and crop varieties, sustainable and healthy foods, etc. are very important elements in a competitive, sustainable food supply chain.

# Implementation of the Food Strategy

The Food Strategy sets out a framework for continued long-term work towards a competitive food supply chain by the year 2030 and addresses the entire food supply chain. Thus the commitment of, and collaboration between the relevant stakeholders at local, regional and national level is a key factor in the implementation of the strategy. Businesses and organisations that are part of the food supply chain themselves have a major responsibility to help meet the strategy's objectives, and their own actions and measures are crucial to the strategy's success. The State should help to lay the foundations for continued work with food supply chain stakeholders. The Government believes that it is important that there

is a dialogue to enable cooperation and exchanges of experience between public, private and voluntary sector stakeholders throughout the food supply chain and that these stakeholders are given opportunities to come together. This dialogue is essential for the implementation of the strategy.

As part of the implementation process, the Government will be producing an action plan. The plan will include actions that will help to achieve the objectives of the strategy and will be updated continually.

The Government intends to monitor the Food Strategy regularly from now until 2030 and will mandate a relevant authority to draw up indicators to monitor and evaluate the strategy. In-depth monitoring will be undertaken on a regular basis and submitted to the Swedish Parliament.

#### Related documents

- Government bill 2016/17:104 A national food strategy for Sweden
  more jobs and sustainable growth throughout the country
- The Government's action plan
- Collected submissions 2015–16
- Documents and information material are available on the Government's website: www.regeringen.se/livsmedelsstrategin

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The success of the PM och vänner restaurant in Växjö shows that it is possible to run a high-class restaurant outside the major urban areas. In 2016, the restaurant was awarded a Michelin star.

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