savills

SPOTLIGHT

FOOD BEYOND TODAY

RURAL – UK – 2026

RESEARCH

KEY STATS

15%
DROP IN UK SELF-SUFFICIENCY SINCE THE 1980S

23%
POTENTIAL LOSS OF FARMLAND BY 2050

32%
PROJECTED FALL IN DOMESTIC FOOD PRODUCTION

2100
POPULATION GROWTH SLOWS AND PLATEAUS

> The world will not need more food in the future but better food
>
> **JACK BOBO**
> **DIRECTOR, UCLA ROTHMAN FAMILY INSTITUTE FOR FOOD STUDIES**

TOP TAKEAWAYS

01
Collaboration throughout the supply chain is key.

02
Everyone taking a fair share of both risk and reward across the supply chain and being transparent will help build sustainable relationships.

03
Operational and behavioural change of food systems will be required to adapt to external forces such as climate change.

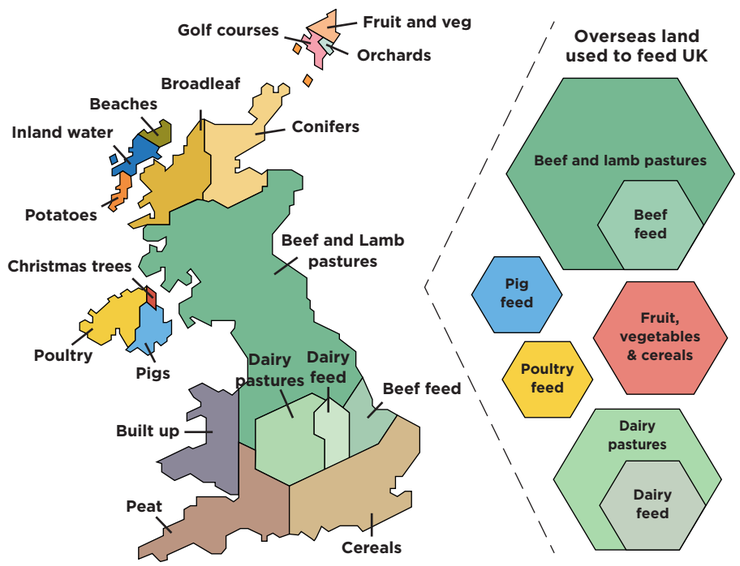
A good food system

In June 2024, we published our Spotlight Food and the Environment, which focused on the drivers of UK food production, increasing productivity and regenerative farming. In this publication, we focus on the food system from a production perspective, on supply chain collaboration, and on the changes required for tomorrow's table.

The UK food system is at a crossroads, driven by a number of factors affecting production, supply chain interaction and consumer demand. While there is no agreement on whether the food system is "broken", it is clear that it requires a review to ensure it is fit for purpose and resilient from farm to fork.

UK food production
Self-sufficiency has become the most frequently discussed metric when assessing the UK food system. Today, from the 70% of land used to produce food (Figure 1), the UK is 65% self-sufficient in all foods - down from 80% in the 1980s. During the Second World War, our 30% self-sufficiency was used against us in enemy strategies, prompting the UK Government to forge ahead with producing more food. Food production was modernised, mechanised and incentivised, with the move from horses to tractors, the introduction of fertiliser and the Common Agricultural Policy, resulting in improved self-sufficiency. Its decline since has been due to the choice to invest in other industries, increase income, and use the revenue to import food.

FIGURE 1: UK LAND USE



Source: The National Food Strategy: The Plan (2021)

The UK Food Security – Outlook to 2050 report (2025) highlights the potential loss of up to 23% of currently farmed land by 2050 due to competing land use demands, including housing, solar infrastructure, tree planting, and carbon offsetting. The report states that, unless mitigated, these trends could lead to a 32% fall in domestic food production, further increasing reliance on imports.

The UK is a net importer of nearly all food and agriculture categories, and imports by value are nearly two and a half times the value of exports. Only beverages break that trend, with whisky almost entirely responsible for the exports, although even they have decreased in recent months. This trend could change following any removal of tariffs and restrictions by President Trump on whisky imports.

According to HMRC (2026), dairy and red meat exports increased by 16.6% and 12% respectively in 2025 as overseas demand for British produce continued to climb, highlighting the growing role of global markets in supporting UK produce and placing significant importance on any future trade deals the UK agrees.

Future food trends
Jack Bobo (UCLA Rothman Family Institute for Food Studies) states that while global population growth is expected to reach 9.5 billion by 2050, the increase is entirely due to people living longer, not due to higher fertility rates. This will cause population growth to slow and plateau for many countries from 2100. He suggests that the world will not need more food in the future, but the food production system will need to ensure that what we produce is done so within resilient systems to survive external forces such as global shocks – "we're moving from more to better food".

Food production system drivers
Profit, climate change and policy are three areas influencing the future of food production systems and emerging food trends.

Profit
Profitable production systems are essential for sustainability, reinvestment and growth. Defra commissioned the Farming Profitability Review, led by Baroness Minette Batters (December 2025), which resulted in 57 recommendations to the government. Whilst England-focused, they could apply to the UK.

Hamish Logan, Savills Food and Farming Consultant, reports that Scottish malting barley remains a cornerstone of the UK cereals sector, underpinning the global reputation of Scotch whisky while offering one of the clearest examples of a value-led, provenance-driven supply chain. Around 900,000 - 925,000 tonnes of malting barley are used annually in the Scotch whisky supply chain, supplying approximately 90% of the sector's barley requirement. The long-term grower, maltster and distiller relationship is an example of the supply chain working well, mainly due to increased focus on quality and consistency.

The recommendations will feed into the promised national food strategy and farming roadmap. The tone for the future is that we cannot wait for the government, nor can we expect the government to financially incentivise food production as it has in the past. This raises an important question: where should farming businesses look for future financial returns (Figure 2).

FIGURE 2: INCOME OPPORTUNITIES

Public money for public goods	Private money	Diversification	Crop production income
Environmental Land Management schemes	Environmental markets, water company schemes and supply chain contracts	Tourism and events	Growing and selling raw materials and food

Source: Savills Research

Case study: Richard Bramley farms 230 hectares (568 acres) of cereals, sugar beet and potatoes in Yorkshire
Over the last 30 years, Richard feels that, due to external challenges and pressures, farming businesses have had to become more resilient to survive. Richard's objective is to produce food while protecting and enhancing the environment (with a specific focus on soil health) while delivering a sustainable profit. The three drivers of business profitability for Richard are:

Managing operating costs — **Maximising prices from end markets** — **Reviewing alternative income streams**

Collaboration within the supply chain is important, and Richard believes this is increasing. He is working with PepsiCo, a potato purchaser, on trials for future crop resilience and with Yorkshire Water on land use, which positively impacts water quality. Both are offering financially incentivised support, which aligns with the food production system. Richard believes a coordinated long-term plan is lacking for the UK food production system, and more collaboration with the supply chain is needed to move businesses from just surviving to thriving.

Climate change
According to the Institute of Grocery Distribution's 2026 Climate Risk Assessment, climate change could increase the cost of the UK food system by up to £2.6 billion by 2050.

Our food production systems must adapt to a changing climate. The case study later in this report explores the impact of climate change on production systems, how farmers are responding, and how these changes are shaping wider food systems.

Policy
England, Scotland and Wales have each set out their food strategies (Figure 3). All have a shared ambition to improve diets and better integrate food production with environmental protection and recovery. Scotland stands apart and ahead of the others in placing food production within a statutory policy framework through the Good Food Nation (Scotland) Act, signalling clear government intent and long-term commitment to domestic food production alongside wider social and environmental outcomes.

In contrast, there is no regulatory requirement underpinning food strategies in Wales or England, nor any explicit target for food production at a UK level. As a result, while the willingness to support food systems is evident across all three nations, it remains to be seen whether non-statutory approaches will deliver the same level of focus, accountability and tangible impact as Scotland. Local and regional initiatives are emerging, such as Agri-Food Growth Plans which are being developed in the South West and food partnerships on the Isle of Wight.

FIGURE 3: UK NATIONS' FOOD STRATEGIES 2025

	Scotland Good Food Nation Plan	Wales Community Food Strategy	England Good Food Cycle / Food Strategy
Legal status	Statutory – required under the Good Food Nation (Scotland) Act 2022. Led by the Scottish Food Commission	Non-statutory, but strongly aligned with the Well-being of Future Generations (Wales) Act 2015	Non-statutory policy framework. Advised by The Food Strategy Advisory Board and complemented by the newly formed Farming and Food Partnership Board
Primary purpose	Deliver whole-system food transformation through law-backed planning and accountability	Strengthen local and community food systems, improve health and resilience	Set national direction and outcomes for food policy. Builds on the work of Henry Dimbleby (The National Food Strategy, 2020 and 2021)
Key priorities	Six national outcomes covering health, equity, environment, prosperity and participation	Focus on local supply, healthy eating, food poverty, community resilience and green growth	10 priority outcomes covering health, access, productivity, fairness, resilience and sustainability
Delivery model	National Plan and future local authority and health board plans	Local Food Partnerships in all 22 local authorities. The Welsh Government launched Rooted in Wales in March 2026	Delivery to be defined through future policy
Role of local government	Statutory role – local plans required	Central role – Local Food Partnerships coordinate action in every authority	Encouraged, but not required
Funding attached	No single new funding pot. Draws together existing programmes	Over £2 million per year (2025–26), funding secured to March 2028 for local food initiatives	No dedicated funding settlement
Monitoring and indicators	Targets, indicators, reporting and review included	Monitoring via partnership reporting and alignment with well-being goals	No consolidated monitoring framework yet
Oversight	Scottish Food Commission (statutory body)	No single statutory oversight body; Welsh Government and Future Generations Commissioner	No independent oversight body
Policy maturity	Most developed and formalised	Operational and funded at the community level	Strategic and directional

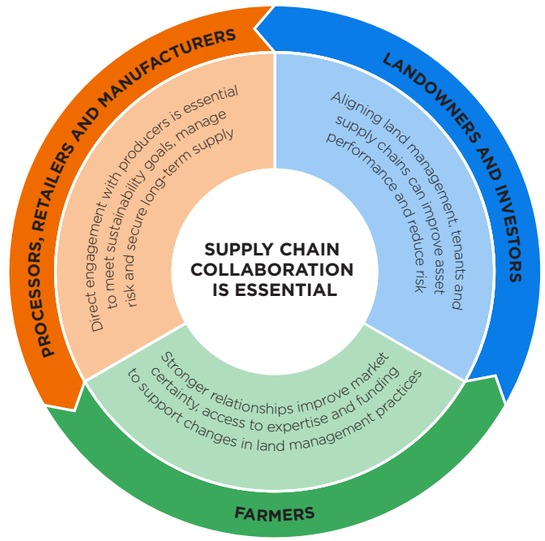
Source: Savills Research

Working supply chains

The National Security Assessment report (2026) states, "without significant increases in UK food system and supply chain resilience, it is unlikely the UK would be able to maintain food security if ecosystem collapse drives geopolitical competition for food. Countries best placed to adapt are those that invest in ecosystem protection and restoration, and resilient and efficient food systems".

The relationship between food producers and supply chains is entering a period of structural change. For decades, agricultural supply chains have been largely transactional: prices set by commodity markets and engagement between buyers and farmers limited mainly to meeting specifications. That model is now shifting quickly, driven by a convergence of economic, environmental and geopolitical pressures that is reshaping how food businesses operate. Together, these forces are aligning the interests of producers and buyers, making closer collaboration a source of shared resilience and value (Figure 4). Recent announcements by retailers have committed their support to UK producers; for example, Sainsbury's is investing £5 billion to expand long-term UK farming agreements, and Morrisons has committed £1.6 billion to its UK food supply chain.

FIGURE 4: SUPPLY CHAIN RELATIONSHIPS



Source: Savills Research

Case study: McCain UK Farm of the Future
McCain is no stranger to knowledge transfer, operating three demonstration farms across England: in Yorkshire, East Anglia and Shropshire. These are on McCain growers' farms (from the 250 contract growers') and involve potato trials, research and knowledge sharing to support the McCain regenerative agriculture framework.

In 2020, the Global McCain Sustainability Strategy proposed three Farms of the Future, which aimed to advance the work of the demonstration farms and utilise owned land, thereby de-risking growers and giving McCain complete control over a whole farm. The demonstration farms only focus on the potato crop, whereas the Farm of the Future encompasses the whole farm, the full rotation, including other crops.

The global commitment was to have three Farms of the Future by the end of 2025: Canada (McCain hometown of New Brunswick), South Africa (to cover the southern hemisphere), and the third location was to be decided.

The McCain family has a farming background, commitment to sustainable agriculture, and strong UK connections which have supported the good progress UK growers and the UK McCain team made through the regenerative agriculture framework, demonstration farms, and the vision for ground-breaking research. The strength of customer relationships and the McCain brand in the UK sealed the UK's selection to host the third Farm of the Future.

Savills worked with McCain to review options for purchasing or leasing land and recognising the research nature of this project connected McCain with the University of Leeds. The shared objectives and ambitions revealed that collaborating for the Farm of the Future would be a win-win for both. Savills helped agree an 18-year Farm Business Tenancy (FBT) to enable a rotation with potatoes once every six years. The first activity included drilling a cover crop last autumn, ahead of spring-planted potatoes, with the remaining arable land moving into McCain management following the 2026 harvest.

The FBT took into account a memorandum of understanding with the University of Leeds regarding current trials in place and the collaborative effort for future trials.

The Farm of the Future will extend the trials the demonstration farms have been looking at on sustainability and resilience to a whole farm system. These involve minimal cultivation, one-pass planting, cover crops ahead of potatoes, and irrigation technology. New objectives for the future will also include:

- Aligning the system with the pig unit on the farm. Can McCain achieve a circular nutrition programme?
- Trialling autonomous vehicles
- Investigating novel fuel sources such as hydrogen

Information from the Farm of the Future will be disseminated via the McCain website and through farm visits and interactions with growers and other stakeholders.

Case study: SS Horton & Sons and Matthews Cotswold Flour

SS Horton & Sons and Matthews Cotswold Flour are working together to grow high-quality milling wheat using regenerative farming practices. The farming model focuses on improving soil health, nutrient-use efficiency, and crop resilience while meeting the quality specifications required for flour production. The partnership is characterised by open communication and an understanding of the costs and risks involved in changing farming systems.

Figure 5 is provided for illustrative purposes only. It is based on data and evidence gathered by SS Horton & Sons and highlights the opportunity cost of doing nothing for food producers in a conventional farming situation versus implementing regenerative agriculture practices. The conventional system decline looks at input volatility, loss of ecosystem services, degrading soil health and shrinking margins, versus the long-term resilience of soils to weather shocks, reduced exposure to input price rises, and working ecosystems that support food production in a regenerative system.

A key feature of the collaboration is the use of clear performance metrics, ensuring environmental claims are evidenced by measurable results rather than narrative alone. Production standards are maintained to ensure commercial viability, with minimum wheat yield expectations of around seven tonnes per hectare, and a maximum nitrogen application threshold of 165 kg per hectare to encourage nutrient-use efficiency without compromising crop performance.

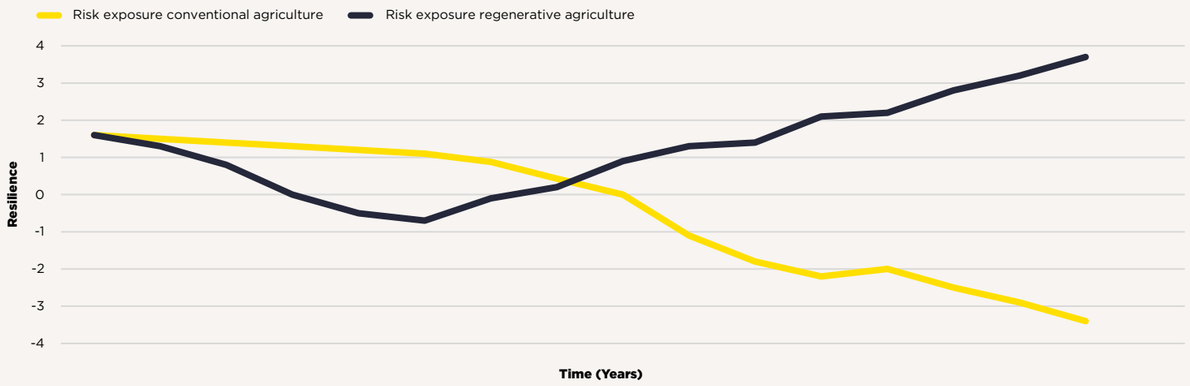
Crop protection is carefully managed using integrated pest management, with the aim, when conditions allow, of reducing fungicide applications to a single treatment rather than the three or four typically used in conventional systems. Livestock are also integrated, either grazing within standing cereal crops to help break disease cycles or grazing on cover crops within the rotation to improve nutrient cycling and soil health, as well as providing an income. All practices are supported by robust record keeping and independently audited each year, providing transparency and credibility.

This independent oversight provides clear evidence of genuine environmental improvements, reduces the risk of greenwashing, and generates a reliable dataset to track progress over time.

Matthews Cotswold Flour contracts are designed to strengthen farm resilience and ensure a reliable flour supply over the long term, reducing exposure to fluctuations in grain quality and availability.

Unlike traditional commodity relationships, value is created not only through yield and volume, but also through provenance, quality and sustainability attributes. By linking land management to end product outcomes, this model supports farm profitability and builds more resilient, collaborative supply chains. The most successful businesses over the coming decade are likely to be those that build collaborative, transparent and resilient relationships across the food system, recognising that environmental performance, production resilience and commercial success are increasingly interconnected.

FIGURE 5: OPPORTUNITY COST OF DOING NOTHING



Source: SS Horton and Sons

UK supply chain priorities

Figure 6 shows the results of Savills food supply chain analysis, which reviews companies' progress in sustainability commitments and supply chain collaboration between 2022 and 2024. While there has been an improvement in companies' approach to the strategic aspect of their responsibilities, the operational, food production element remains lacking. Only 30% of companies have a sustainability group for producers; these are effective ways to influence their supply chain, so the analysis highlights a significant opportunity for the future.

FIGURE 6: SUPPLY CHAIN ANALYSIS	2022	2024
Companies with a sustainability strategy	**62%**	**70%**
Companies taking part in Science Based Targets Initiative	**37%**	**51%**
Companies with a sustainability group for farmers/growers	**25%**	**30%**

During further research in 2025, we reviewed 51 UK sustainability-linked supply chain contracts. Of the 51 contracts, 37% mentioned animal welfare as an objective, 31% greenhouse gas reduction, 31% regenerative agriculture, and 29% biodiversity. There were several consistent patterns:

1. Incentives focus on a small set of core practices, particularly reduced tillage (mentioned in 37% of contracts), cover cropping (27%), rotation diversity (18%), nutrient optimisation (22%) and improved grazing management (24%). These interventions are recognised as delivering both environmental and agronomic benefits, which explains their prevalence across supply chains.
2. Financial incentives were generally modest. Payments are often embedded within contracts or delivered through technical support rather than significant price premiums. The primary value to farmers frequently comes through improved stability, reduced risk and access to support rather than large direct payments.
3. Data requirements are increasing rapidly. Carbon accounting, environmental monitoring and practice verification are becoming standard expectations across many supply chains, reflecting the need for credible reporting to investors and regulators.
4. Successful programmes tend to involve collaboration between multiple actors, farmers, processors, retailers, advisors and financial institutions. This reflects the complexity of delivering environmental outcomes within productive farming systems.

Figure 7 summarises three of the 51 contracts: ADM (arable), Arla (dairy) and Morrisons (livestock). Each contract has a main objective (blue) and delivery actions (green). Premiums vary and are not always publicly disclosed. Following the recent changes in the government's financial incentives, food producers should review their contracts to ensure requirements and payments remain economically viable and continue to incentivise sustainable food production.

FIGURE 7: ANALYSIS OF SUPPLY CHAIN CONTRACTS

✓ Explicitly mentioned ✓ Not written but insinuated heavily

Contract	Information	Premium paid	Biodiversity	Welfare	Greenhouse gas reduction	Regenerative farming	Reduced tillage	Cover crops	Crop diversification/ rotation	Rotational grazing	Environmental feature enhancement	Legumes	Nitrogen management	Manures
Arla UK 360/Arla Regenerative agriculture pilot	Active on UK dairy farms, with detailed on-farm scoring across six pillars. Backed by farmer councils and used to verify sustainability claims on packaging.	Up to 3 pence per litre milk bonus. An additional 1 pence per litre for taking part in the annual climate check.	✓		✓					✓	✓			
ADM Regenerations Programme (UK version)	UK programme mirrors ADM's global regenerative supply efforts. Operated in conjunction with MRV (monitoring, reporting and verifying) technology providers and UK grain merchants (e.g. Frontier, Openfield).	£10-£60 per hectare per year, depending on practice adoption and monitoring metrics for wheat. £15-£66 per hectare per year, depending on practice adoption for OSR.				✓	✓	✓	✓			✓	✓	✓
Morrisons beef and lamb groups	Retailer-linked farmer groups with coordinated supply relationships and technical support.	Price stability and potential premiums are achievable depending on contracts.	✓	✓										

Source: Savills Research

KEY STATS

69%
OF UK ADULTS SUPPORT GENE EDITING

50%
YIELD LOSS CAN OCCUR IN UK SUGAR BEET FROM DISEASE

4%
OF GB HOUSEHOLDS HAVE AT LEAST ONE GLP-1 USER

21%
OF RESPONDENTS ARE CONCERNED ABOUT PROTEIN CONTENT

Tomorrow's table

The Land Use Framework in England, published on 18 March 2026, made a clear, long-term commitment to maintain overall food production; however, it does not consider what we should be growing or how much, only saying "we will produce more of what we consume". Likewise, Scotland's Fourth Land Use Strategy focuses on sustainable production rather than on specific products to be produced. We provide our thoughts on future food production opportunities, guided by policy, profit, and climate change, and ultimately driven by a change in consumer demand.

1. Gene editing

Technology will play a role in developing the food of the future. The concept of gene editing (also known as precision breeding) was covered in our Food and the Environment Spotlight. Figure 8 looks at the impact gene editing could have on the UK food supply. According to a British Sugar national consumer survey, 69% of UK adults strongly support, and 80% of Gen Z (born 1997 - 2012) support using gene editing to create a sustainable and resilient future for British farming.

A gene-edited barley developed by Rothamsted Research is now set for commercial farm trials in England – a step forward for the technology. Gene editing will be an important tool in the toolbox for future food producers to maintain relative competitiveness.

2. Meat and two veg

The Grocer reported in 2025, around 4% of Great British households (twice that of 2024) have at least one person using GLP-1 (weight-loss injections). An effect of this has been a move away from ultra-processed foods and an increase in whole-food consumption, driven by greater awareness of what people are eating. The impact on the supply chain will be a transition to sourcing higher-quality raw products and ingredients, providing an opportunity for farmers. While food provenance will remain important, the time has come to focus on nutritional quality and density.

So, is tomorrow's table more traditional than we thought? Minister of Food Security and Rural Affairs, Dame Angela Eagle, says the horticulture sector is a priority, but she does acknowledge it lacks policy direction. Given the enormous UK trade deficit, this category is certainly worth further exploration. Understandably, some of the deficit is due to the import of foods that cannot be grown in the UK, or to fill seasonal supply gaps.

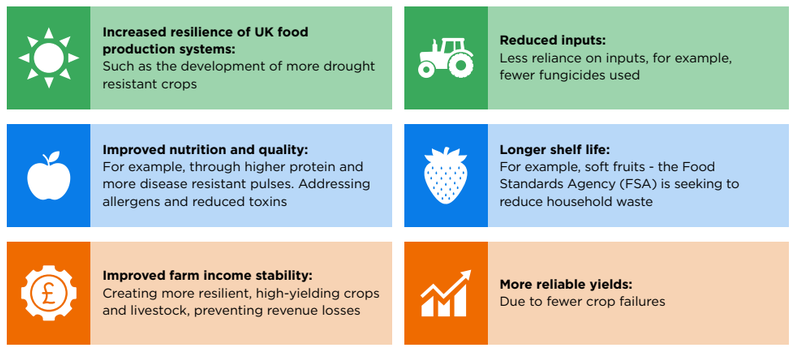
> Policy, profit and climate change will influence what ends up on tomorrow's table

Tomorrow's table will evolve to exclude ultra-processed foods and move towards something much more comparable to that of the 1940s, where "meat and two veg" becomes the staple again. As this trend develops, processors will need to engage with growers to demonstrate the integrity of their supply chain and ensure they deliver a quality product, not a fast one.

British Sugar – Gene editing research

British Sugar recently secured a further £1.1 million in UK government grant funding to progress research into how gene editing can support resistance to the sugar beet disease, Virus Yellows. The technology uses precise genetic changes to redirect sugar beet's own natural defence mechanisms to enable resistance to Virus Yellows, a disease spread by aphids. For sugar beet growers, this is welcome news, as individual growers have reported a 50% yield loss. It is hoped that the research will generate positive results by the end of the decade, ready for field trials.

FIGURE 8: IMPACT OF GENE EDITING



Source: Savills Research

Adam Davies, Savills Tourism, Leisure and Events team, says food provenance and integrity have become important considerations for consumers, including in the UK's visitor economy. Increasingly, travellers are seeking experiences that genuinely connect them with place, and there are few touchpoints which deliver this more effectively than food and drink. Provenance is no longer a desirable add-on, but a core driver of destination choice and an essential component of modern tourism value. Investing in provenance whether through supply-chain transparency, partnerships with regenerative producers, or immersive agritourism, enhances resilience. This also strengthens competitiveness and supports the long-term stewardship of our rural landscapes. Food provenance has the opportunity to sit at the heart of how the UK differentiates itself globally as a tourism destination. It is not just about what visitors eat, but the story that food tells about the land, people, and values behind it.

3. Fruit

For the health-conscious consumer of the future, fruit is worth a mention. There has been a slow, long-term decrease in domestic production's share (circa 16%) of the total fresh fruit supply. The UK remains heavily dependent on imports (84%). Anecdotal data suggests 2025 saw a boom in UK fresh fruit production, particularly berries, due to weather conditions.

Where are the opportunities? The Vaccinium group of crops trade deficit runs at over £250 million and is increasing. Most of the imports are blueberries and cranberries. These are two of the newest crops developed, and both are supported by strong marketing in the UK. While cranberry production would require considerable investment in infrastructure to establish, blueberries are grown more conventionally.

The most important deficit is in apple production, where, over the last seven years, imports have, on average, exceeded exports by approximately £300 million. Most imported fruit crops that could be grown in the UK are multi-year crops. Production is benefiting from new technology developed elsewhere in the world. In addition, some of these crops are expected to receive an economic boost from robotic harvesting systems using AI-based recognition. Fruit crops with a long production period require consistent government policy and support to establish. There is a material risk that, if these crops are not introduced now, the UK will be left behind when the robotic harvesting systems currently under development are finally in operation.

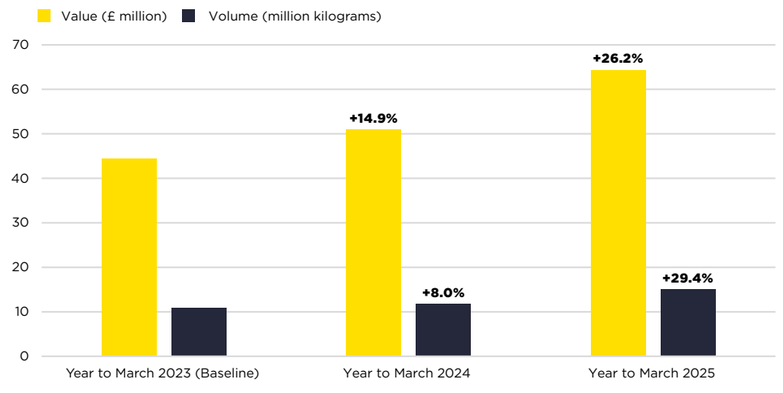
4. Protein

Nutrient-dense foods are rising in demand. High-quality protein sources meet this requirement, such as lean meats (chicken, turkey, and lean beef), fish, eggs, dairy (Greek yoghurt and cottage cheese), beans, and lentils. While meat, eggs and dairy are the traditional protein sources, alternatives such as chickpeas, fava beans and mung beans are increasing in demand. Hodmedod's is operating in this market where demand (UK and global) for beans and pulses is increasing.

The Agriculture and Horticulture Development Board (AHDB) reported year-on-year growth in the cottage cheese market between 2024 and 2025, with value increasing by 26.2% and volume by 29.4% (Figure 9). The AHDB's Consumer Tracker reported that 21% of respondents said they are concerned about protein content when choosing food, a three percentage-point increase compared to the last quarter.

Lab-grown meat (known as cultivated or cultured meat) is a protein market to watch. Products are being produced as a slaughter-free alternative whereby animal cells are cultivated in bioreactors to synthesise meat products without the need to raise and slaughter livestock. This is driven by ethical and sustainability conscious consumers. While not yet available in the UK for human consumption, there is pet food on the market which contains 4% "cultivated chicken". In 2025, an FSA (UK Food Standards Agency) evidence review stated that up to 41% of people would be willing to consume "cultivated meat" in the UK. A report on farmers' perspectives suggested initial concerns about the feasibility of commercial production and the longevity of market share.

FIGURE 9: GROWTH OF THE COTTAGE CHEESE MARKET



Source: AHDB / NIQ demand panel

Case study

The English Olive Co. Adapting to change

With the climate changing and the UK experiencing wetter winters and drier, warmer summers, the crops we used to grow may no longer be the most effective use of land. David Hoyles, a farmer in South Lincolnshire, gives us insight into how he is adapting to climate change and the food production opportunities he is pursuing.

David farms on fertile Grade 1 retained silt land, close to the Wash. The farming business has an extensive rotation including potatoes, peas, sugar beet, cereals and mustard seed for Colman's. Over the last decade, some crops have struggled with changing climate conditions that have led to warmer and drier periods. While the business has done all it can to mitigate dry weather, constructing three large reservoirs in the last six years (covering 10 hectares with around 180,000m^3 of capacity) and 8.2km of underground mains, it has not been able to offset rising temperatures. Varying nutrient sources and bio-stimulants have been tried, with limited success. This has prompted David to explore alternative crops better suited to these conditions.

David felt that vineyards were not suited to the soil conditions at the Lincolnshire site, and a visit to Italy led to the trial of olives. A small trial was planned, but this was reviewed following Brexit, as plant health phytosanitary checks became more complicated. David realised that scale was needed to mitigate import costs. Following research in 2023, David pressed the go button and ordered 18,000 trees (four varieties of 4,500 trees each).

A further six varieties (300-400 trees each) were also ordered to monitor differences among species. The three main drivers for the new enterprise were:

1. Adapting to climate change – growing crops that fit better with the changes we are seeing.
2. Producing a product where the business can control the brand "The English Olive Co.".
3. To provide succession planning for the business and allow family members to be included in other enterprises across the farm.

Planting, growing and harvesting

The trees have been planted in "Super High Density (SHD)" and will look like hedges when they mature. They are in long lines running north to south and quite close together. This is a more modern planting method designed to allow mechanical harvesting with a machine similar to that used for grapes and blackcurrants.

When the SHD system is used in Spain and Italy, the lines of trees are spaced 3 metres apart; however, due to the UK receiving less light, the spacing had to be widened to 4 metres. Within the lines, the trees are spaced 1.5 metres apart, and David is running a trial with them closer together to understand the impact.

A permanent trickle irrigation system has been installed to provide precision application of both nutrition and water. The irrigation system is tapped into the farm's ring-main. A container with a pressure-reducing pump with four outlets has been installed, allowing all varieties to be irrigated, and it is controlled via an app. Soil moisture probes are used to monitor the conditions.

In these early years, the olives will be hand-harvested. The first harvest in December 2025 was a community project, involving friends, family and neighbours with the promise of olive tasting once the harvest was complete. Normally, harvest would be earlier in the autumn; however, the olive press machine arrived late, and a few olives were lost in the November storms as a consequence. The varieties did perform differently, with nearly half the olive grove not performing at all, and five of the six smaller trials performing brilliantly.

David says, "We're not strictly organic as we do use a few artificial fertilisers, but we are not using fungicides or insecticides as I think future consumers will demand this production method. We use integrated pest management (IPM) methods such as grass with beneficial species in between trees to encourage all the predators we can".

The manufacturing process for olive oil involves washing, smashing, and spinning (100kg per hour work rate). Followed by bottling and labelling. The oil will taste different each year, depending on the season, but will always be high-quality and traceable to provenance.

The future

This is the first commercial olive site in the UK and remains a trial. Olive trees are slow-growing, reaching maturity (i.e., peak production) at 20-25 years. This is a long-term investment, and the barriers to entry include the enterprise's high risk and slow return.

Climate change is impacting the traditional growing areas. Olive oil prices spiked in 2023 after two consecutive years of heat and drought in Spain which severely impacted yields. Similar to vineyards, we may see olives become a mainstream UK cropping decision as the European climate evolves.

David is exploring several opportunities for the future:

1. Growth - A decision will be made this month on whether to increase the area of olives grown by 10 hectares. The trees will yield significantly when fully grown, and there is a cooperative opportunity to work with others who could grow olives.
2. Be more specialist than generalist - rent land for others to grow crops, for example, vegetables (overwintered cold-tolerant varieties are being developed).
3. Land and water are key for the future, and these services will be valuable to others.
4. Make better use of data and technology - soil moisture probes, weather stations, Normalised Difference Vegetation Index and Green Area Index data to monitor the trees' biomass – exploration of how to use data and technology continues.
5. Use all the crop. Opportunities continue to be explored; a) having beehives in the olive groves and selling English olive grove blossom honey, b) dehydrating the olive leaves to produce English olive leaf tea, and c) using the pomace (waste from olives when smashed) to produce skin care products such as soap.

David is excited for the future, "We must work with the climate changing and not against it; other European countries are adapting and we must do the same". He continues, "the food and health agenda are picking up, and demand for The English Olive Co.'s oil outstripped supply in 2025 and we will continue to focus on providing high-quality, local food".

> "We must work with the climate changing and not against it; other European countries are adapting, and we must do the same

WHAT NEXT FOR UK FOOD PRODUCERS:

01

Understanding your cost of production for each enterprise is essential for making key decisions and ensuring long-term profitability.

02

Review where supply chain collaboration can occur. Collaborative models are emerging, for example, brewing supply chains where sustainability-linked barley contracts are becoming more common, and dairy supply chains where environmental performance is increasingly integrated into long-term pricing frameworks.

03

Use data and technology to monitor the performance of individual crops against metrics such as climate change impact. Review alternative crops and rotations if necessary – change may be required.

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