



REPORT

Resilience of the food supply chain to disruptions

Department for Environment, Food & Rural Affairs

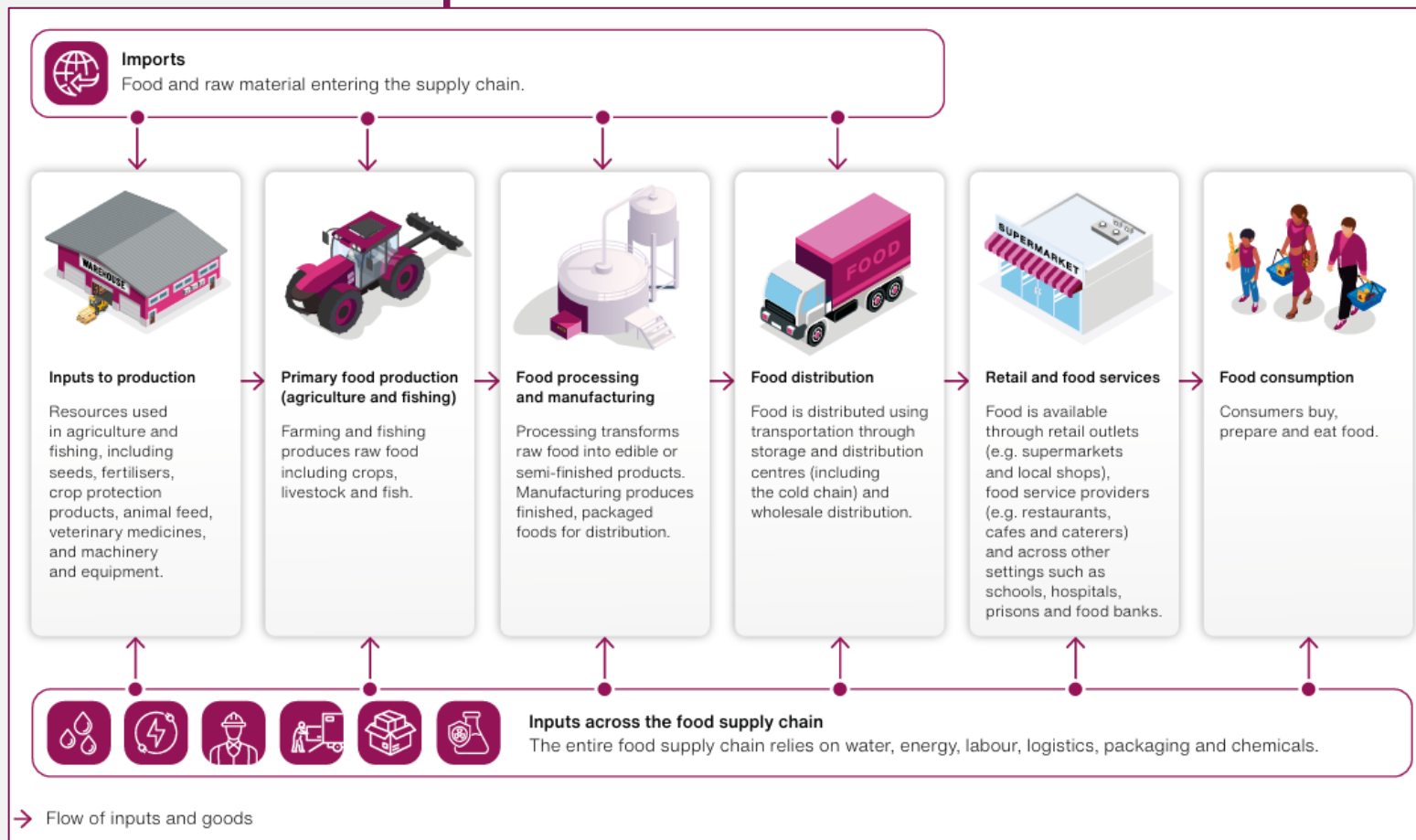
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Link to report:
<https://www.nao.org.uk/wp-content/uploads/2026/09/Resilience-of-the-food-supply-chain-to-disruptions.pdf>

The food supply chain



National Audit Office



Impacts of disruptions

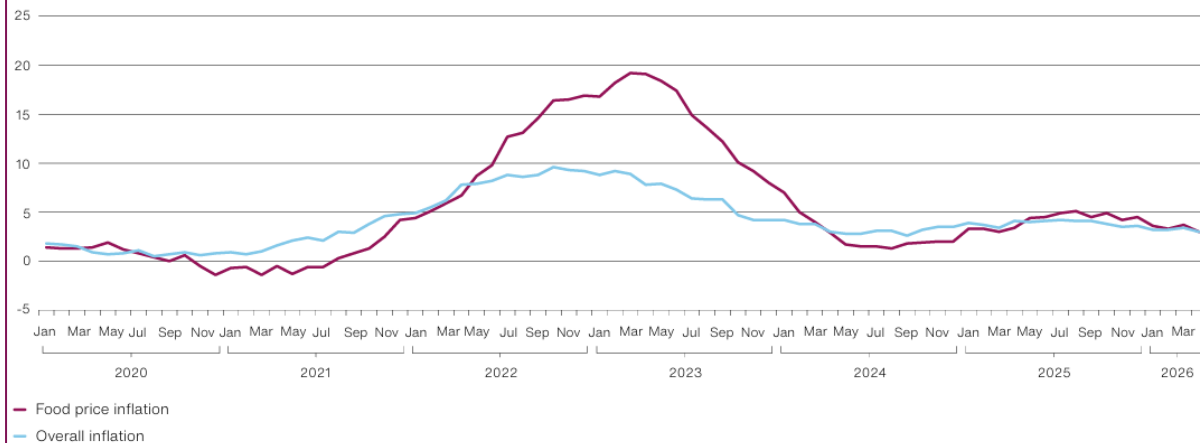
- Large price rises
- Reduced access/choice
- Economic and business impacts



Food price inflation compared with overall inflation in the UK, January 2020 to April 2026

Food price inflation was substantially higher than overall inflation for long periods during 2022 and 2023

Inflation – year-on-year change in prices (%)



Key risks



“Defra is less confident about the ability of businesses to withstand shocks without government intervention in the next five to 10 years because of increasing risks and the potential for more severe disruptions”



Chronic risks

Environmental

- Climate change and increasing weather variability
- Water availability
- Environmental degradation (soil and land)
- Biodiversity loss

Geopolitical

- Reliance on international trade and imports of food and inputs
- Trade relationships
- International conflict risk and instability
- Global competition for food and agricultural inputs

Technology and cyber security

- Cyber vulnerability of critical infrastructure

Economic

- Concentration of market power within the supply chain
- Reliance on critical inputs (energy, fertiliser, feed)
- Cost pressures (energy, inputs, transport)
- Household income and affordability constraints

Societal

- Availability of labour
- Public trust, behaviour and consumer response
- Inequality and differences in vulnerability across the population

Security

- Preparedness for disruption of the food system
- Border, customs and port security capacity

Biosecurity

- Animal, plant and human biosecurity controls
- Surveillance, early detection and response capacity
- Antimicrobial resistance in humans and animals

Potential to cause or exacerbate acute risk impacts

Acute risks

Natural hazards

- Extreme weather
- Space weather

Disease outbreaks (human, animal, plant)

- Pandemic
- Animal disease outbreak

Accidents and system failures

- Nuclear accident
- Ports blockage
- Disruption of UK space systems
- Failure of key infrastructure
- Industrial action

Import constraints

- Border closures for biosecurity or security reasons
- Loss of shipping routes
- Export bans, sanctions or trade disputes

Malicious acts

- Chemical, biological, radiological and nuclear attacks
- Physical infrastructure attacks
- Cyber-attacks

War or armed conflict

- Production and input impacts
- Infrastructure damage and insecurity (energy, ports, transport)
- Trade and border disruption

Understand the risks and increasing resilience



Strategy



Skills and resources



Engagement with industry



Working with other departments



Examples of approaches taken by other countries to strengthen food supply chain resilience

Other countries have adopted approaches not currently used by the UK

Finland

Stockpiling of grain: Finland maintains government-owned grain reserves covering about nine months of consumption. The grain is stored in private sector facilities through government contracts that are reset every four years through a competitive process. Funding is ringfenced, supported by a small share of Finland's energy-use tax.

Industry collaboration and information sharing: Finland maintains a register of around 1,500 companies deemed critical to society. With them, the government has built a public-private partnership network across seven sectors, including food supply. Companies provide monthly situation updates, and the government shares a consolidated monthly report with the entire network.

Sweden

Direct government investment in resilience: Sweden is piloting a government programme to invest in state-owned power generators that are mobile for critical parts of the food supply chain during power disruptions. It has started to build up government-owned grain reserves and is considering investing in mobile mills to be able to process the stored grain.

Advice to industry: In January 2026, the Swedish government published a brochure, *Preparedness for businesses: in case of crisis or war*, outlining the role of Swedish companies and steps they can take to prepare; it is not specific to the food supply chain.

European Union (EU)

Legislation/Identifying critical infrastructure: The EU Critical Entities Resilience Directive, in force since January 2023, covers sectors including food production, processing and distribution. Member states must identify critical entities by July 2026, after which those entities are required to implement measures to strengthen their resilience.

Note

1 We have not undertaken an audit of the effectiveness of the measures introduced.

Households and communities



Preparation for a severe disruption to food supply



Response plans



Scenario testing/exercising



Critical assets



Emergency powers



Local response capability



National Audit Office





We are the UK's independent
public spending watchdog



Rich Sullivan-Jones
Director, Value for Money (Defra/resilience)



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