



EATING UP THE ALTERNATIVES

**SUPERMARKET LOCAL SOURCING INITIATIVES:
MOVING US FURTHER AWAY FROM A
SUSTAINABLE, LOCAL FOOD ECONOMY**

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eating up the alternatives supermarket local sourcing initiatives: moving us further away from a sustainable, local food economy

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introduction

Provenance (where foods come from) sounds sexy. Think Cornish clotted cream, Scottish raspberries, all the rage on the menus of fancy restaurants and in supermarket advertising in the Sunday supplements. But declaring provenance doesn't equate to saying it's locally produced: You can buy, for example, Cornish clotted cream in Scotland and Hereford beef in London. Provenance is also somewhat one-dimensional; it describes the physical place of production but does not provide the broader economic, environmental and social aspects and benefits attributable to local food.

'The typical supermarket contains no fewer than 30,000 items. About half of those items are produced by 10 multinational food and beverage companies. And roughly 140 people — 117 men and 21 women — form the boards of directors of those 10 companies. In other words, although the plethora of products you see at a typical supermarket gives the appearance of abundant choice, much of the variety is more a matter of packaging and branding than of true agricultural variety, and rather than coming to us from thousands of different farmers producing different local varieties, has been globally standardized and selected for maximum profit.'

-Frances Moore Lappé and Anna Lappé in 'Hope's Edge'[1]

The Soil Association says that local food is "food arising from a system of producing, processing and trading, primarily organic and sustainable forms of food production, where the physical and economic activity is largely contained within and controlled within the locality or the region where it was produced, which delivers health, economic, environmental and social benefits to the people in those areas." [2]

Whilst supermarkets are very keen on provenance and have created a variety of 'local' sourcing initiatives, in reality the genuine local food sector is in danger of being co-opted by the big food retailers.

the global trade in food

So how did we get from a local trading system, where people knew the provenance of their food without the need for fancy labels, to the present situation, where most of us don't have a clue where our food comes from or how it was produced? Although it sounds like a new problem, there has been a global trade in food for millennia. What's new today is its pace, scale and who controls it. During the Roman Empire, wine, grains, salted meat and fish were imported into the UK; the spice trade between Asia and Europe flourished between the fifteenth and seventeenth centuries; and the wealth of the British colonial era was built on global trading in sugar, coffee, tea and salt. In the 1880's, refrigerated ships carrying frozen meat started to ply the seas between New Zealand and the UK. Despite this flourishing of global trade, however, it was in reality very small and most people continued to obtain the bulk of their food needs from within the UK; much of it from local sources.

In more recent times, the pace and scale of the global trade in food has increased dramatically. In the last 40 years, the value of international trade in food has tripled and the tonnage of food shipped between nations has grown fourfold.[3] This growth has been partly encouraged by technological innovation: diesel engines, refrigeration and processing technologies, together with cheaper transportation, especially air transport, all underpinned by cheap fossil fuels. It has also been encouraged by the rise of free market economics and the creation of international trade agreements, such as the General Agreement on Tariffs and Trade (GATT) and the World Trade Organisation's Agreement on Agriculture, which have removed the barriers to global trading in food.

corporate control of the food system

The ownership of the food system has changed. The global food system is now controlled by a small number of very powerful multinational food corporations. Over the past 20 years, there has been a frenzy of corporate takeovers as food corporations fought with each other to increase their share (and hence their profits) in the food market. The result is an incredible concentration of market power, with just three or four corporations controlling each sector of the food industry. From inputs like seeds, increasingly dominated, fertilisers and machinery to the processing, transportation and retailing of food, each sector is now controlled by a handful of multinational agribusiness/food corporations. From Monsanto and Syngenta to Unilever and Diageo to Tesco and Asda.

the rise of supermarkets

Perhaps the most dramatic development and most obvious sign of the concentration of market power in the food system in the UK has been the emergence of the big supermarkets. Fifty years ago, food was mainly sold in street markets or in small independent shops: butchers, grocers, bakers and greengrocers that filled every high street. In 1960, small independent retailers had a 60% share of the food retail market. By 2000, their share was reduced to 6%, while the supermarkets' share had increased to 88%.[4]

Now most of us buy well-known food brands (from multinational food corporations like Nestle, Kraft and Kelloggs) in one of four big supermarket chains (Tesco, Asda, Sainsburys and Morrisons). These four supermarkets control over 80% of UK food sales, and it's set to get worse. The big supermarkets are still battling it out to see who can become top dog, but Tesco is currently the clear leader of the pack, with a massive 30% share of UK food sales[5]. A report from the All Party Parliamentary Small Shops Group has predicted that, at current rates of closure, there will be no independent retailers left in the UK by 2015.[6]

Historically, small independent stores have been a major outlet for food from local sources. In rural areas, where supermarkets have not yet gained a stranglehold, remnants of this local food sector still exist. A 1997 survey of small independent food shops in rural East Suffolk found 81 shops sourcing food from almost 300 local and regional producers, and some of them had been supplying produce locally for more than 30 years.[7] By contrast, the essence of the supermarkets' success is based on centralised systems of purchasing and delivery and category management systems, which they say keep down transaction costs, help them achieve the necessary volume and year-round supply of food, and control and manage food quality and safety. Only large national or global suppliers can provide the quantities and consistency of supply demanded by these centralised purchasing policies. In practice, this means that the supermarket chains tend to deal with a small number of larger suppliers. For example, Sainsbury buys conventional carrots for all its stores from just three large growers. As Patrick Holden says, "Category management leads to migration towards economies of scale and away from local." [8] Supermarket purchasing and category management policies are effectively the antithesis of local sourcing.

what does the real local food sector look like?

Despite this massive shift in food retailing from small independent stores to big supermarkets, there is still a thriving local food economy that is growing, albeit very slowly. Though local retailers remain an important route to market for local foods, as a result of the decline in local retail outlets, direct sales from producer to consumer have grown in size. Farmers' markets, farm shops, box schemes and sales direct from the farm gate are now the most common routes for local food supply. According to a study of the local food sector by the Department for Environment, Farming and Rural Affairs (DEFRA), the

majority of local food enterprises are micro-businesses, many of them driven by dynamic, energetic individuals who are committed to the local food sector. The majority of enterprises are relatively young, many are producers or growers who have diversified and sought to add value to their products.[9] However, there are still remnants of an older local food sector, which pre-dates the rise of supermarket retailing and reflects a period when local shops were the main route for food purchase.[10]

the benefits of local food

Environmental benefits:

- **Sustainable production methods** - The majority of farmers who sell at farmers' markets use more environmentally friendly farming systems or they farm organically.[11]

- **Reduced transportation** - Trucks moving food account for 25% of all road freight in the United Kingdom. Food transportation within the UK (cars, trains, trucks) creates almost 2% of total UK greenhouse gas emissions. Fresh fruit and vegetables go off quickly – so those that travel long distances usually travel by air, the most environmentally damaging form of transport (11% of greenhouse gas emissions is food transport-related[12]). Car miles associated with grocery shopping increased by over a third between 1992 and 2002, reflecting growing affluence, car ownership and the increase in bulk grocery shopping at out-of-town supermarkets. Relocalising food production and distribution systems will reduce the food system's contribution to these climate-affecting greenhouse gas emissions.

Social/Cultural Benefits:

- **Food security** - Our food and farming system needs to become increasingly resilient as we face peak oil, the impacts of climate change both on our ability to farm (droughts and flooding) and on the consequence of using ever more fossil fuels. There will be increasing competition for land due to agrofuel production and the possibility of resource wars, whether for land, oil, water or seeds. We need to be ready to face these with a locally appropriate and diverse farming system that is capable of supplying the majority of our food needs locally. Otherwise we face the prospect of increasing food injustice between those who have access to food and those who do not.

- **Direct connections between farmers and consumers** - Local food fosters greater trust and connection between farmers and those who eat the food they produce than long-distance food, where there is no obvious connection back to the farm.

- **Food culture and diversity** - Local food can reconnect us with where our food comes from. Many of us have lost our connection with the land and the seasons, and have little or no awareness of when, where or how various foods are produced. The quest for easily transportable, cosmetically attractive, and broadly acceptable produce has favoured the cultivation of uniform varieties, and the production of uniform foodstuffs over the more locally distinct, quirky and genetically diverse varieties that prevailed as part of former farming practices and food traditions and are integral to our culture and landscape. Food that has travelled long distances erodes seasonal and local distinctiveness in favour of uniformity.

- **Freshness, flavour and variety** - Local produce is likely to be fresher, more flavoursome and more varied. Long-distance fruit and vegetable varieties tend to be chosen for their yield and keeping qualities, not for flavour, diversity or nutritional value. Many are harvested before they are ripe and stored for long periods before distribution losing freshness, flavour and nutritional content.

Economic Benefits:

•**Creating jobs and job security** -Diversification of processing and direct supply or retailing of local produce has been critical to the survival of many farm businesses. They get a fairer share of the 'food pound' as they deal directly with the public, receiving fair prices for their produce. Farm businesses involved in the local food sector employ a greater number of people than the conventional agriculture sector. A survey of 70 small food businesses in the south west of England showed that 38% had created new jobs in the previous year (an average increase of 0.5 full-time employees for each business).[13] Long-distance food sold through supermarkets does not reward producers with fair prices for their produce. Instead, we pay for the costs of transport, refrigeration and packaging.

•**Improving local economies** - Money spent on local produce at farmers' markets and locally owned shops stays in the community, cycling through to create jobs, raise incomes, and support farmers and, indirectly, other local businesses (the multiplier effect).[14] Long-distance food sold in supermarkets siphons away profits to company shareholders; very little is reinvested in the local economy.

supermarket 'local' sourcing initiatives

The continued growth in public interest in local foods has brought increasing interest from the big food retailers, which are poised to suck whatever profits they can out of the local food sector. According to industry experts at a Chartered Institute of Marketing event, local food is set to move from a niche marketing opportunity (local and regional food together represent about 7% of food and drink sales[15]) to the mainstream of the supermarket shopping basket. Apparently this is because the major supermarkets are now embracing local food with 'real commitment'.[16]

Why is there suddenly so much interest in local food at the supermarkets? Firstly, under pressure to be seen as 'green', there has been a flurry of press-released 'green initiatives' from the major supermarkets: Tesco's 'Community Plan', Asda's 'Sustainability 360' and M&S's 'Plan A'. As well as commitments to change to energy-saving light bulbs and run delivery vehicles on biodiesel, most of these initiatives include a statement about 'increasing local and regional sourcing'. Secondly, a steady stream of opinion polls and market research reports show that there is increased public interest in the provenance of food and that our desire to buy local food is growing.[17] Most importantly, market analysts forecast that the sector will grow in value by 33% over the next five years[18]. This, as the market analysts point out, is a perfect opportunity for the development of a new profitable category in the supermarket portfolio and, following on from their foray into organic food, the big supermarkets are falling over themselves to source and to be seen to be sourcing 'local food'.[19]

what's wrong with supermarket 'local'? (is it really local?)

There is no official definition of what 'local' means. The most widely accepted definition is that used by the National Association of Farmers' Markets (NAFM, now FARMA).[20] NAFM defines local food in terms of miles to market. Generally this is 30 miles, though in London this is extended to food from within 100 miles of the M25. The Alliance for Better Food and Farming, aka Sustain, has developed a broader definition, which takes account of the social, environmental and economic benefits of local food. In a study by the Food Standards Agency (FSA), 62% of shoppers thought there should be regulation or official guidance on what foods can be called local foods.[21] Few supermarkets have a clear definition of what local means.

Supermarkets often conflate local with regional. Generally, the provenance of the food is more important to the supermarkets than any particular distance from source to sale. Most supermarkets in practice seem to be aiming to increase regional, rather than local, sourcing. Most are sourcing using regional buyers; some have also hooked up with regional food groups, like Taste of the West or Northumbria Larder, to help them find smaller producers. Many are running regional 'meet the buyer' days where potential suppliers can show off their products. Asda has probably gone further than most with its 'local food hubs' model. But despite their name, the Asda hubs are regional not local; their Plumgarth hub now serves not only Cumbria but other Asda stores throughout the North West region. The supermarkets also don't seem to be able to resist turning a successful local product into a regional or national one, rather than look for genuinely local products in each area. Some of the 'local' products developed at Asda's Plumgarth hub are being sold nationally in Asda stores. For example, Asda now sells its Plumgarth eggs throughout the North West and Plumgarth's Cumberland sausage is sold nationwide. Tesco says that one of the beers found through its local sourcing initiative is "already performing so well that it is going national in 100 Tesco stores." [22] Similarly, Sainsbury's says, "Successful producers will begin by supplying just a few stores in their region. If their products have a wider appeal, Sainsbury's will help to build their businesses by expanding distribution." Kellys Cornish ice cream was initially invited to supply a few Sainsbury's stores in Cornwall; it now supplies 120 stores across the UK.[23]

less than honest about provenance

Supermarkets often market foods with evocative imagery of their provenance, but these descriptions can be highly misleading to consumers. Tesco has been caught out labelling products with the incorrect origin. A Tesco meat product labelled as British was, in fact, from New Zealand. Tesco claimed it meant that the style of cooking was British, not the lamb itself.[24] Other supermarkets are also being less than honest about the source of their produce. According to the Guardian, carrots bought at Waitrose carried a picture of Yorkshire carrot farmer Peter Cornish, one of its "carefully selected growers", on the back of the pack, but in the small print the carrots' country of origin was listed as Italy. A bag of parsnips sourced in Scotland had the story of organic English grower Andrew Nottage on the packaging. Packaging printed with the story of watercress grown by the sparkling chalk streams of Hampshire contained a product imported from Portugal.[25] As local producer Bruce Bennett says, "The thing on our side that we have is the element of trust... That's where we do score over the supermarkets, where people are more suspicious of their motives and commitment."

when is a multi-ingredient product a local product?

Another issue that most of the supermarkets have not properly addressed is when a multi-ingredient product can genuinely be called local. Is it when the product is assembled or manufactured locally or when the ingredients themselves are local? Some farmers markets have strict criteria that all ingredients in processed products (e.g. cakes, bread, ready meals), and that can be grown or produced locally, must be local. For many supermarkets, the location of the producer seems to be more important than the provenance of the ingredients. Waitrose is one of the few supermarkets that does address the issue; its local food policy restricts the term 'local food' to multi-ingredient products in which the ingredients are "where possible sourced from the area (for example, in a clotted cream ice cream from Cornwall, the clotted cream and eggs should also be sourced from the same county)." Others do not address this issue in their policies. The Mid-Counties Coop, for example, advertised Oxford Wholefoods products as 'local'. But whilst they were packaged locally, the ingredients (beans, pulses, nuts and seeds) were sourced from all over the world.

fitting a square peg in a round hole: local sourcing and supermarket centralised distribution systems

Despite their rhetoric, the supermarkets continue to use their centralised distribution methods to source food from their 'local' suppliers, making it impossible for them to deliver on the environmental benefits of local food. Soil Association head and organic farmer, Patrick Holden (and also Prince Charles' Highgrove Farm) fell victim to a supermarket's idea of what constitutes local food when he was required to truck his carrots over long distances to comply with Sainsbury's packing and processing requirements. After his local packer closed down, Holden was forced by Sainsbury's to truck his carrots 230 miles to their superpacker in East Anglia. The carrots were then delivered to a regional distribution centre in another part of Wales, and then back to mid Wales to be sold as 'local'. The carrots were still marketed in Sainsbury's stores in bags that told the story of Holden's family farm in Wales. However, the story of their journey from field to supermarket shelf was anything but local and masked an alarming carbon footprint.[26]

According to Richard Wild, who runs a haulage company and works for the big supermarkets, including Tesco, the supermarkets want 'local' produce packed in their own packhouses, which means the produce may travel many miles to the packhouse and then be delivered back to stores local to where the produce was grown and sporting a label saying they are 'local'. He says "the truck leaves (the) packing station at one end of country, collects from a field where produce is harvested, trucked another 200 miles back to the packing station, then another 200 miles by fridge truck to the supermarket distribution centre. Total finished product food mile trip say 600 food miles." [27]

As Patrick Holden put it, "while all supermarkets are preaching localism, most of what they actually do is just tokenism. Their systems are still going in the opposite direction." [28] And perhaps that's not too surprising. The current structure of supermarket transportation and delivery systems makes it unlikely they will deliver on their rhetoric of local food. As Tim Lang, professor of food policy at City University, London, said, "They are locked in to a trucking and packing system that they have invested millions in over the last 30 years. They would have to reinvest dramatically - moving from a few regional distribution centres to hundreds of more local ones - to become really local." [29] And it looks like at least some of the supermarkets are becoming more centralised in their distribution systems, not less. Somerfield has, for example, reduced its distribution centres down from 15 to 9. [30]

supermarket box schemes are missing a vital ingredient

Organic box schemes were pioneered by producers trying to bypass the supermarkets and deal directly with local consumers. So it's more than a little ironic that the big supermarkets are attempting to cash in on the success of these vegetable box schemes. A number of supermarkets (Tesco, M&S, Sainsburys and Waitrose/Ocado) have started their own organic box schemes.[31] But these are, in fact, just glorified home delivery schemes for organic produce and all have missed one of the vital ingredients of a good box scheme: the produce they deliver is not local. Tesco launched its organic fruit and vegetable box scheme in September 2006. The boxes contained produce grown on four farms in East Anglia.[32] Whilst it may have been organic and seasonal, the produce was not local, or even regional. A Soil Association survey compared these supermarket box schemes with independent producer-owned box schemes: whilst a good local box scheme scored 16, the supermarkets scored only 4. The supermarkets scored badly in the survey compared with producer-owned local box schemes because they failed to bring the benefits of local sourcing, which invigorates local economies, reduces transportation and connects consumers directly with farmers.[33] Why would the supermarkets dive into this market when they essentially have nothing new to offer? Perhaps it's the £95m estimated value of the veg box market?

Heinz 'farmers market' soups: Devaluing the meaning of 'farmers market':

Heinz has been the subject of a number of complaints to the Advertising Standards Authority by Sustain and others.[34] Heinz launched a range of soups called "Farmers' Market", with a £1.6 million television advertising campaign in October 2007. The small print on the label acknowledges that the product is only "inspired by farmers' markets". Newspaper and magazine advertising claims that the soups are made with 'selected wholesome ingredients that you would find at a Farmers' Market.' In reality, the soups are neither local nor seasonal, and are not being sold directly to consumers by farmers, unlike produce from a genuine farmers market. The soups are wholly products of the industrial food system, spun by advertisers to look like something they are not. The term 'farmers' market' embodies certain environmental, social and ethical principles and values, which are unwarranted with respect to the ingredients in the Heinz soups. Sustain says that Heinz are flagrantly misusing the term 'farmers' market' and wants to see this sort of marketing "nipped in the bud" to ensure the term 'farmers' market' is not devalued by application to inappropriate products and practices.



ripping off local farmers instead of distant ones?

Supermarkets have a very poor record when it comes to the treatment of their suppliers, especially small suppliers who have considerably less bargaining power in their relationships with the big supermarkets.[35] Meeting the technical and quality standards demanded by the supermarkets is a significant barrier to small producers. Patrick Holden's carrots fell victim to supermarket dictates over packing and processing requirements, which ultimately led to his delisting by Sainsbury's for supplying below standard produce. Holden says the carrots were of a high quality when they left the farm; it was the supermarket's requirements that he truck them across the country to their packhouse to be washed and packed that diminished their quality. The superpacker could not cope with such small quantities of produce, the carrots had to be tipped into larger containers for washing, damaging up to 15% of the crop. And because they could only be packed once large enough batches had accumulated after washing, the carrots were also becoming prone to small patches of rot.[36] A small cheese producer from Wales tells the story of neighbouring cheese makers who increased production to supply Waitrose with Welsh artisan cheeses, buying new machinery to meet the increased production levels and standards required by the supermarket to supply its stores. "My fellow cheese makers expanded production, the first lot went out on pallets, that was it, it never got reordered which proved the point. Can't trust them." [37]

Will the farmers involved in these new local food initiatives fare any better in their relationships with supermarkets than those in the conventional food system? Sourcing from micro-enterprises has the potential for even greater levels of power and trust imbalance than the conventional food system.

invigorating local economies?

One of the benefits of local food is that it helps maintain a strong local economy. The same amount of money is worth more when all the transactions stay local, and its value is multiplied as it is reinvested many times over. This is often referred to as the multiplier effect. Supermarket local sourcing provides part of this equation. Some money goes to the local supplier, but supermarkets whisk away their profits rather than reinvesting them in the community, as a local shop is likely to do. A local retailer would probably use a local printing shop or firm of solicitors, whereas a major supermarket will use national services contracted centrally. One study suggests that less than 16% of supermarket turnover translates into local wages, purchases and services.[38]

will local sourcing replace conventional sourcing in supermarkets?

Centralised purchasing and category management would seem to militate against the supermarkets dealing with an expanded base of small suppliers, except in a very limited way. None of the supermarkets is willing to say what its target for local sourcing is, but it is unlikely to be anywhere near the 100% achieved by the best local vegetable box schemes. Tesco's Emily Sharma acts all coy and says they have a very big target, "but I couldn't possibly share it with you!" [39] The reality is that the supermarkets are not aiming to replace conventionally sourced product lines with locally sourced ones. They are, rather, aiming to sell a few distinctive local products side by side with conventional products, as they have with organic produce. Many of the local products in supermarkets are 'value added products' and, like organic, are being sold at a price premium. Tesco's 'Localchoice' milk, for example,

has been sold at a price premium over conventional milk.[40] In other words, they are aiming to create just another niche market for unusual or innovative premium-priced local/regional foods, rather than making a wholesale move away from conventional national/global sourcing towards supplying affordable, fresh local produce.

Whilst the supermarkets might say they are keenly looking for small producers to source 'local' foods from, they are really only looking for products that are distinct, do not duplicate existing products, and meet the same or higher quality standards than products already stocked. They are not looking for basic, fresh wholesome produce: "Fruit and vegetables don't tend to have the 'unique' element we want from local produce – a cabbage is a cabbage wherever it is grown..."[41] Sainsbury's says that, through their 'Supply Something New' scheme, it is looking for "outstanding products that are unique, often with an interesting heritage and, most importantly, that taste great." The big supermarkets' local sourcing initiatives look increasingly like exercises in finding new product lines for store shelves rather than a real move towards local sourcing.

supermarket local: moving us further away from a sustainable local food economy

"Local food economies are our best hope for checking the drift toward the total global economy." - Michael Pollan in *Beyond the Bar Code: The Local Food Revolution*

There seem to be conflicting views of how the local food sector might develop: Is it a sector which delivers 'added value' and speciality foods to a niche market, or a sector that enables all communities to access fresh, local food and support their local economy?

In a FSA survey of shoppers, the top two reasons for buying local were "supporting local businesses" (57%) and "supporting the local area and/or community" (51%). Other motivations included issues surrounding food quality, such as knowing where the producers were (18%), and 'fresher food' (11%); 'environmental factors', such as causing less air miles (12%) and less pollution (9%).[42]

In contrast, supermarket local sourcing is nothing to do with altruism. Asda has calculated that there is a £160m per annum sales opportunity in selling local products.[43] Indeed, supermarkets are reporting ever-increasing profits from the local food market.[44] Supermarkets are not wedded to the idea of local sourcing, except as a money spinner: put a few local and regional pickles and jams in stores (niche marketing of added value goods) and call it a 'local' sourcing policy. They have no intention of making the wholesale switch from global/national sourcing to sourcing all types of goods, for all consumers, locally.

"There are many social enterprises, businesses, manufacturers and caterers who are making efforts to use genuinely local and seasonal food. Their efforts are being undermined by the growing use of terms such as 'local' and 'seasonal' to market foods, often promoted with evocative imagery of local production, that do not comply with these ethical and environmental credentials. These terms are being used in ways that could be highly misleading to consumers." Ethical Hijack[45]

"There is some possibility that in spite of all of this, they would make substantial moves towards stocking more local food if enough people pressured them, but this leaves all the other problems with supermarkets untouched. What will we have achieved if supermarkets just switch to ripping off local farmers instead of distant ones? How will stocking local food make supermarket jobs more rewarding? How will it bring back the independent stores which have been put out of business, or ensure that money stays in the local community? The simple answer is that it will not. Supermarkets are as inexcusable as ever."[46]

It's hard not to conclude that supermarkets' local food sourcing strategies are just another victim of their desire to make a fast buck and boost their Corporate Social Responsibility rhetoric. As the blurb for the 2008 Responsible Retailing Summit says, "This event focuses on how UK retail executives can develop corporate social responsibility (CSR) strategies that will boost profits, reduce costs, increase market share and enhance their retail brands."^[47] Not a word about the environment or local economies and communities. It's business as usual, then, at the supermarket.

Endnotes

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