

food ethics

PLUS

Colin Tudge struggles to digest supermarket sandwiches

Big retail

Supermarkets want to go green, fair and healthy. Can they?

Bill Vorley, Andrew Fearne and Julian Oram on **buyer power**

Kath Dalmeny, Kate Soper and Cliff Guy on **choice**

Analysis, comment and predictions from sustainable development guru **Alan Knight**, Slow Food founder **Carlo Petrini**, **Ella Heeks** of Abel & Cole, Citigroup's **Meg Brown** and many more

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From the editor

Supermarkets are looking greener by the day. The past few months have seen a spate of environmental commitments from the likes of Tesco, Sainsbury, Marks & Spencer and Asda/Wal-Mart. Does this new green tinge signal fresh growth for the sector or is it a sign big retail has reached the end of its shelf-life?

This issue of *Food Ethics* puts the recent pledge-fest in perspective. The big players are cleaning up their act, but can they do enough? Could we ever shop loyally at a supermarket chain – and be the kind of customer they need us to be – yet also buy on fair terms for workers and live within the planet's means?

Big retail is about scale, power and choice – and this is as true of McDonalds or Starbucks as it is of Tesco. Their global reach and high volume creates economies of scale, particularly in distribution. Large market share makes each a powerful buyer, with an influence along the supply chain that leaves state regulators in awe. And, behind the modest insistence that they serve customer demand, they exert a profound influence on what we want and on what we buy.

All this could be good. Supermarkets' economies of scale, power along the supply chain and influence on our consumption habits could put them in a great position to clean up our food system and to do it fast.

But there's reason to be sceptical on each of these three counts.

Their economies of scale come from scouring the globe and buying in bulk, adding value from food miles and from sourcing out of

season. Will doing that more efficiently cut our food's environmental footprint by enough?

Their power as buyers pushes the costs of higher environmental standards onto suppliers and workers. The debate rolls on over whether supermarkets exert this pressure fairly and legally on their UK suppliers. There is little question, however, that the cost-price squeeze from rising, hard-bargained supermarket standards is eroding workers rights, in the UK and internationally. That just doesn't wash with a commitment to sustainable development, which says we need to do better than save the planet at the expense of social justice.

The 'choice' supermarkets offer us is also in question. The choice whether or not to live in a way the planet can sustain isn't much of a choice at all, so instead supermarkets need to help us live sustainably by lowering the footprint of everything on their shelves and – you guessed it – by encouraging us to buy less. This isn't as far-fetched as it sounds. After all, organic box schemes show that businesses can thrive by being trusted 'choice editors'. But this may be an insurmountable challenge to a supermarket format that is built around product differentiation and market segmentation.

In principle, this problem will solve itself. If the big retail business model cannot be sustained, then investors will put their money elsewhere. In practice, of course, the timing is crucial. The risks and alternative opportunities for investors could come about long after irreparable damage has been to the planet or to people's lives.

Many things can adjust financial markets to the same time zone we all live in: action by investors themselves, like Tesco shareholder Ben Birnberg, who wants the company to employ independent auditors who will check workers at its suppliers' factories and farms are guaranteed decent working conditions, a living wage and job security; regulation, which can express concerns people have as citizens, but cannot rationally act out in the marketplace; innovation, to find other, more sustainable retail models; and benchmarking, so we can tell how supermarkets are performing environmentally and socially, as well as financially.

All of these take imagination. We need to think what else the future of food retail could look like – what would be the greenest, fairest and healthiest ways of getting hold of our food? It isn't enough to ask which supermarket chain is doing best. We need to know whether the best is good enough.

Even big retail bosses and investors don't have to assume supermarkets will be part of that future. They could make money out other ways of doing business – direct delivery or more specialised convenience stores, for instance. And, like the rest of us, they have a sharp incentive to think laterally. The planet's liabilities aren't limited.

Tom MacMillan
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letters

If you want to respond to any of the articles in this issue or raise a different point, please write us a letter. We also publish full-length articles 'in response'. We can only publish a limited number of articles, so please get in touch before putting pen to paper. Our contact details are on the contents page.

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Regulators need your evidence to stamp out exploitation

Sir; the recent BBC investigation into migrant worker exploitation and your Spring '07 edition of *Food Ethics* (*Working for food*) emphasised the difficulties facing industry regulators where the complex supply chain with multiple agents has little respect for national boundaries.

The Gangmasters Licensing Authority (GLA) has experienced first hand the issues that lead to exploitation and encountered a remarkable array of people and organisations committed to helping any worker who experiences exploitation. However, I do not recognise the picture painted by one of your contributors of the 'whole system of food production, including packaging and transport, being full of abuse, criminality and intimidation' (p.14). What I see is the GLA acting to end abuse and I want those with evidence of exploitation to tell us so we can do even more.

Regulation is only one of the GLA's weapons. We license gangmasters (many of whom are respectable employment agencies), ensure they comply with our Licensing Standards and enforce the law by refusing or revoking licences and through prosecution. But we need to do more besides. The GLA must also establish good links with workers and the organisations that support them by providing them with information about their rights, gaining their trust so they tell us about exploitation and we can get information to people before they travel to the UK.

The intimidation of workers is an insidious act designed to thwart the efforts of regulators, support organisations and workers alike. Criticising regulators only plays into the hands of its perpetrators. The GLA is committed to ending worker exploitation. We are a small organisation with limited resources but I believe we can punch above our weight by working with those who share our objectives. We rely on intelligence not only from other government agencies but also from the workers themselves and from those who work tirelessly to protect and help them. The GLA and our government colleagues have the powers to deal with these issues but we need others to provide evidence for us to act upon.

Paul Whitehouse, Chairman
Gangmasters Licensing Authority
www.gla.gov.uk

news

Business Forum

As this edition reports, ethical questions around climate change, obesity and new technologies are starting to become core concerns for food businesses. The Food Ethics Council has launched a new Business Forum to help senior executives gain expert insights into the big issues of the day.

Starting in late June, the forum will meet four times a year for in-depth discussion over an early dinner at the award-winning Acorn House restaurant in London. The outstanding speakers who have agreed to lead discussions include: Sir Don Curry, senior advisor on food and farming; Will Hutton, Chief Executive of The Work Foundation; Rosie Boycott, former editor of the *Independent*; Stephen Joseph OBE, Executive Director of Transport 2000; Shaun Spiers, Chief Executive of the Campaign to Protect Rural England; and Professor Richard Jones, author of *Soft Machines: Nanotechnology for Life*.

Any inquiries about this initiative should be directed to Tom MacMillan (tom@foodethicscouncil.org).

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Analysis: buyer power

Who is paying for supermarkets to clean up their act?

Colleagues in continental Europe are inclined to remark that the British have the highest expectations of how their food is produced, and the lowest expectations of how it is cooked.

Irrespective of the horrors which we British can unleash in our kitchens, there is no doubt that we shop at our favourite supermarkets with a growing set of expectations about the sustainability and ethics of the food that we buy.

Supermarkets are now responding to this list of expectations with vigour, competing with Fairtrade labelled goods, locally sourced food, animal welfare-friendly labels, and soon we can also expect climate-friendly offerings. There is talk of a race to the top among the leading supermarkets.

The higher profitability of UK grocery retailing compared to continental markets gives our supermarkets some more space to use their 'gatekeeper' position for good. But so, too, does their buyer power. Buyer power not only confers on supermarkets the ability to extract lower prices from leveraged suppliers. It also confers the ability to make sustainability a cost of

doing business with them. Sustainability and ethics can easily become additional obligatory services, in the same way as packaging and distribution, and thereby add to the cost-price squeeze on suppliers, primary producers, and their employees.

Is there evidence that a race to the bottom on price and supplier standards is running concurrently with a race to the top on sustainability?

The article by Julian Oram overleaf answers an unambiguous yes. There is also evidence that a race to the bottom is alive and well in a recent paper released by the Competition Commission in January, in association with the Commission's Emerging Thinking as part of its current Groceries Market Investigation.¹ A section of the paper analyses suppliers' experience of practices or behaviours of the sort regulated by the Code of Practice on supplier-supermarket trading relations, such as requests for obligatory contributions to retailers' marketing costs, or excessive delays in payment. The survey showed that for the vast majority of suppliers to the top four supermarkets, such behaviours had occurred to a greater or equal extent in the last 12 months. Not one behaviour was reported to have occurred less frequently.

So, the current trading environment is characterised by both a proliferation of standards for ethics and sustainability and the use and abuse of market power by buyers working to a different set of objectives. Corporate responsibility, meanwhile, seems stuck in external communications departments rather than being built into procurement policy. There are exceptions to this rule, but too few.

How will these divergent forces play out? Can sustainability continue to be delivered through more-for-less retailing?

The future of trading relations seems likely

to be one of protest and partnership. Sustainability will feature within fewer, more collaborative but nevertheless one-sided supply chain partnerships. In October 2005, Wal-Mart chief executive H. Lee Scott Jr announced what was to become the Sustainability 360 campaign, which holds its suppliers more accountable for environmental and social standards. A year later, the (then) head of Wal-Mart's global buying unit, Lawrence Jackson, announced that the retailer wants to work with fewer factories handling larger orders, "consolidating our factory relationships because as we do that, we're able to get our hands around ethical standards, quality and sustainability".

Is civil society shooting itself in the foot?

So there's a turn up for the books: sustainability and ethics as drivers of food business consolidation. Are we ready for this? Is civil society shooting itself in the foot, by driving the very restructuring of agrifood that it has for so long lamented?

Time, perhaps, for both retailers and campaigners to look beyond leveraging retailers to deliver sustainability, and to consider which business models can allow sustainability to be delivered as a shared investment, a shared risk, and a driver of inclusive market development. There's no need for us to lower expectations of how our food is produced. But unless we also ask who pays to meet those expectations, sustainability may become a dirty word.

¹ *Research on Suppliers to the UK Grocery Market. A Report for The Competition Commission prepared by GfK-NOR. 15 January 2007.*
www.competition-commission.gov.uk/inquiries/ref2006/grocery/emerging.

Efficiency or exploitation?

Supermarket scale economies blur into abuse of market power

It is up to regulators to keep them separate, says Julian Oram

The modern British supermarket is an awesome phenomenon, a testament to the power of technology, logistics management and economies of scale to channel goods from an extensive global web of suppliers towards a nexus of retail outlets. So adept are the supermarkets at providing an apparently seamless supply of consumer goods that it's easy to overlook that many of the items on those shelves are there thanks to the labour of masses of mainly women workers from developing countries who pick, process, package and stitch those products.

With more than seven out of every ten pounds spent on food shopping in the UK now going through supermarket tills, Britain's leading grocery retailers now serve as the main gatekeepers for developing country food (and increasingly clothes) exporters to the UK market. And in order to appease these gatekeepers, developing country suppliers are finding that they must accept cut-throat demands.

This phenomenon was highlighted in ActionAid's recent report, *Who pays?*, which shows how UK supermarkets' abuse of their dominant market position has created tremendous pressure on developing country suppliers to deliver more for less, for example by forcing prices down, adding additional charges, and demanding increased quality and improved productivity without increasing the price paid. In addition, supermarkets often seek to pass on commercial risks, obliging suppliers to take the hit when patterns of demand change unexpectedly, ordering at the last minute, and changing details at short notice. Suppliers are left struggling to fulfil their orders, or with unsold excess stock.

These cost cuts and risk transfers are, we found, regularly passed on to workers at the tail end of the supply chain in the form of low

wages, job insecurity and a denial of basic labour rights. In Costa Rica, for example, we found that supermarket price wars have catalysed the spread of a new model of employment throughout the banana industry, characterised by wages as low as 33p per hour and excessive working hours. Women have been squeezed out of permanent jobs into piece rate work, sometimes earning wages so low that they are forced to stay in the fields during pesticide spraying.

In Bangladesh, young women stitching garments for export to Britain's supermarkets earn as little as 5p per hour – wages that are not enough to support themselves or their families – while being forced to work long hours for days or weeks on end. Meanwhile, in India, where pressure from UK supermarkets to reduce producer prices has contributed to an explosion in informal and illegal processing operations, women cashew nut workers told us about poverty wages of as little as 30p per day, job insecurity and damaged health from exposure to corrosive oil and smoke released in the roasting process.

The terrible irony is that, through their low paid and often dangerous and back-breaking labour, the women and men working within the supply chains of Britain's largest food retailers have helped boost the turnover and market share of these companies, enabling them to consolidate their buyer power and further increase their ability to squeeze suppliers.

This self-reinforcing spiral of supermarket growth, where appalling pay and working conditions for women workers provide a hidden subsidy for cut-price goods and retailer profits, blurs the line between the normal efficiencies of economies of scale and the abuse of market power.



© Tom Pietrasik/ActionAid

Which raises a question: are large-scale retailers by their very nature destined to keep workers in developing countries trapped in poverty? This is difficult to answer, as it is currently hard to disentangle the size and market dominance of UK supermarkets from their largely unchecked ability to abuse the buyer power afforded by such scale. While some supermarkets have offered suppliers a better deal in certain product ranges, this has only been done selectively and has not in any way signalled a change to the basic pile 'em high, sell 'em cheap business model of UK supermarkets that fundamentally relies on market power to extract value from less powerful actors down the supply chain.

ActionAid argues the only way to establish whether over-concentrated UK retail markets are intrinsically at odds with fairer supplier relationships is to make an initial stab at more effectively regulating the existing supermarket sector. To date, however, the UK government has failed to do this, instead opting for reasons of political expediency to back a Code of Practice drawn up by the Competition Commission in 2000, which sets guidelines for how the

country's leading supermarket retailers should deal with their suppliers. But the code has never been adequately enforced, and has been extensively criticised by industry analysts for its 'weasel wording' and loose language. In addition to the code, the government has encouraged retailers to launch a plethora of voluntary social responsibility initiatives, and has backed industry claims that such schemes effectively address public concerns about ethical issues in supermarket supply chains.

But, as ActionAid's research has demonstrated, this approach falls far short of what's needed. The problem is that in the current retail climate, where retaining and maximising market share and buyer power are fundamental to maintaining a successful investor profile, asking the biggest four supermarket chains to be nicer to their suppliers is a bit like asking a casino to distribute its earnings back amongst the gamblers who filled its coffers – it simply doesn't work.

The encouraging news is that the UK Competition Commission now has an opportunity to grasp the nettle. ActionAid is calling for the introduction

of a proactive regulator with the power to monitor the relationships between supermarkets and their suppliers, ensuring that the big retailers do not abuse their dominant position.

This watchdog body should have the power to investigate complaints. It should have the power to review standards to account for changes in market conditions and buying practices, and to stamp out unfair or unreasonable behaviour by supermarkets. Only by doing this might it be possible for the women workers who prop up the UK's retail giants to claim their basic labour rights, and thereby to benefit meaningfully from their relationships with British supermarkets.

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Good, bad and ugly, but not systematic abuse

Picture this. You supply a highly perishable and seasonal commodity to one of the supermarkets. You are a significant player in your sector but the supplier of only one of 30,000 product lines listed. Supply programmes are generally agreed with this customer annually, with indicative prices and promotional plans contingent upon availability and demand. As the seasonal peak approaches you receive a call from the buyer. The ensuing conversation goes something like this:

(Buyer) "Hello Fred, just called to discuss our pricing and promotional plans over the next two weeks.... We want to go on promotion and discount the product by a third off the planned price."

(You) "But we'd agreed that price, supply is more or less as planned and we know consumers don't respond to price promotions on this product at this time of the year, because demand is already at its peak."

(Buyer) "I know, but we want to go on promotion with this product. You have ten minutes to agree or we will remove all your products from our shelves within 24 hours. The clock starts now Fred, I will hold and wait for your answer..."

You call in your boss, the MD and explain what's going on.

(Buyer) "A minute to go Fred, what's your answer?"

(You) "No, we're not going to do this."

(Buyer) "So what are you going to do with all that product in the supply chain Fred? If you sell it on the open market you will crash the price."

(You) "Yes we will, so everyone will get lower priced product, the consumer won't buy any more and the whole industry will suffer. And if anyone asks us why we did it we'll tell them."

(Buyer) "OK Fred, bye for now."

The name is fictitious but the nature of the conversation is not. Purchasing managers the world over will recognise this as the kind of unethical behaviour that was standard practice in the days when adversarial trading and opportunism were the norm in commodity supply chains. Many observers believe this to be the way supermarkets still behave today, abusing their power and forcing concessions from weak suppliers who are struggling to survive in an increasingly competitive trading environment. But the reality is that conversations like these and the unethical abuse of buying power are rapidly becoming the exception to the rule in many, if not most, of our supermarket supply chains, as supermarkets finally wake up to the damage that behaviour of this kind does to their business and the benefits to be gained from developing strategic relationships with key suppliers.

One of the most important conclusions from research I have been involved with at Kent Business School on justice in supermarket supply chains, involving hundreds of supermarket suppliers and conversations with supermarket employees in various functional areas (buying, merchandising, technical, logistics), is that supermarkets are extremely varied in the way they treat suppliers - we must stop talking about supermarkets as one amorphous group. Buyers play a crucial part in the interface between organisations but their role is, we believe, diminishing. Supermarkets are becoming increasingly dependent on fewer, larger, more sophisticated suppliers

who take on more of the responsibility for delivering on the promises supermarkets make to their shoppers.

During the course of our research we have seen numerous examples of good, bad and downright ugly behaviour, but we do not concur with the widely held view that supermarkets' abuse of power is systemic. Indeed, we believe that many aspects of supermarket procurement processes and supermarket buyer behaviour are poorly understood, not least because they are extremely difficult to research. It is much easier to gain access to supermarket suppliers and those who have fallen victim to rationalisation are all too willing to tell tales of unethical buying behaviour. They are less keen to reveal their own shortcomings: lacking strategic vision or not investing enough in developing relationships with their supermarket customers; not making use of those relationships to become more efficient and more effective at delivering value for end consumers.

The fact is that supermarkets are a dominant force in retail food supply chains the world over and the behaviour of supermarket buyers in many countries leaves a lot to be desired - they're no angels! However, the best UK supermarkets are light years ahead of the best in other countries in terms of how they work to develop collaborative relationships with suppliers who are willing and able to invest in building strategic relationships with them.

There will be casualties as supermarkets and their supply chains evolve towards this collaborative model. But we shouldn't confuse this structural adjustment, and a few cases of unethical behaviour, with a systemic abuse of power designed to rip the heart out of British agriculture - after all, supermarkets have a vested interest in building a sustainable food and farming industry in this country. But the fact is they need help to make this happen. They should not shoulder all the blame when it does not!

We need vision – not just sticky labels and a choice – to meet the challenge of climate change

Low-carb diet



Our food contributes a very significant share of our overall greenhouse gas emissions. The latest conservative estimate from the Food Climate Research Network (FCRN) is that 18 percent (nearly one fifth) of all greenhouse gases associated with UK consumption come from the food system. This includes all stages of the food chain, from farming practices, through processing and distribution, to storage, cooking and waste disposal.

Unpacking this figure, we can say that about eight percent of total UK greenhouse gas emissions are from farming. Looking at it another way, about eight percent of total UK greenhouse gas emissions are from meat and dairy. Other surprises are that greenhouse gas emissions from sectors such as alcohol and sugar-sweetened drinks, and the movement of fresh produce by air-freight, are each big enough to register in percentage points on the UK's overall consumption graph. Yet such important revelations are only beginning to appear on food labels and in the mass media. They often tell only one part of the story and they can be downright misleading.

What tools do we have to reduce greenhouse gas emissions from the food system? Do we present information to the consumer and hope (or perhaps pray) that they will make carbon-efficient choices? Do we give individuals and companies personal carbon budgets to spend, assuming that they will automatically turn down the volume on demand? Do we rely on individual companies auditing and reducing their carbon footprint, even though they currently lack credible methods for doing so? Do we simply ratchet up the cost of greenhouse-gas intensive fuels and farming inputs, hope to survive the ensuing mess, and then emerge with a magically self-regulating, carbon-efficient food system? And, without knowing which will be most effective, should we encourage these processes to happen more rapidly through legislation, incentives or penalties?

I've deliberately posed these as questions, since the answers are far from clear. What route the food industry will take to help us

towards a less greenhouse gas-intensive food system is itself still very much in question. It seems that food producers and manufacturers are only just beginning to open the Pandora's box marked 'greenhouse gases' and 'oil dependence', and are responding in very different ways to what they find.

Just as in the long-running debate on nutrition - around product formulation, marketing and labelling - the mantra of 'consumer choice' still features strongly. Within the past few weeks, some early Pandoras have announced the first tentative steps into examining and publicising the carbon footprint of their products. Consumers are now told that Walkers Cheese & Onion crisps represent '75g of carbon', according to the Carbon Trust's newly-launched carbon assessment methodology. Do we all suddenly feel empowered to make well-informed snack choices? Of course not, since no-one (presumably not even Walkers) really knows what this means. Is 75g a lot or a little? Who can say? In a vacuum of information, and without a 'guideline daily amount' of greenhouse gases, lonely carbon labels can't help consumers make low-carbon choices. Their main benefit is that carrying the Carbon Trust logo commits a company to identifying the greenhouse gas 'hotspots' in their farming, production and distribution processes, and working to reduce the figure; just as displaying colour-coded nutrition information on the front of packets has given food companies an incentive to reformulate their products to avoid red warnings of 'high fat' or 'high salt'.

But is it enough? When it comes to food, we are all still at the stage of making baby steps into carbon assessment and mitigation, and we seem to be trapped in a pattern of trying to 'tweak' our inherently energy-intensive system by, for example, making long-distance food transport a bit more efficient; fine-tuning our ubiquitous refrigerators; or even (and this is no joke) providing public funding for research into how to make cows fart less.

All of this lacks vision of how a food system

would need to be structured to emit 80 or 90 percent less greenhouse gases than it does now. Reduction on this scale may well involve some uncomfortable trade-offs. The first painful choices are already being faced, with Tesco and M&S launching air-freight labels on fresh produce, for the first time making visible one facet of our oil-dependent food system. Does this mean we will pull the rug out from under food producers in developing countries, and that these supermarkets are putting the onus on customers to do so? How did it come to the point where a rapidly-applied air-freight sticker replaces a long-term strategy to help developing-world farmers reduce their oil dependence gradually, and prepare for the new climate-concerned marketplace?

Climate change challenges some of our most treasured hopes for an ethical food system. We may need to accept this, but we also need to decide where the buck stops. Where do we say that some objectives, such as fair trade or animal welfare, are non-negotiable, even if it means sacrificing some carbon efficiency? And where shall we seek the additional carbon savings to balance and defend these non-negotiable objectives, or to soften the transition to a less carbon-intensive system? As an ethical food movement, we need to get more carbon literate and move swiftly past this phase of crisp-packet labels and air-freight stickers. We need to start setting out a vision for a truly sustainable low-carbon food system, and the steps to achieve it.

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What does choice mean when it comes to shopping?

Supermarkets claim that they provide unrivalled 'choice'. If 'choice' means simply a greater profusion of discrete items available for purchase, there is some justice in the boast. But if it implies provision for, and capacity to make, *significant* discriminations then the equation of 'choice' with access to a sheer plethora of 'goods' is a whole lot shakier. Many items in the supermarket aisles would, after all, be almost indistinguishable if stripped of their brand insignia. The choice between variants of the same article amounts, in this sense, to little more than a cosmetic distinction for which the choosers pay very dearly indeed. It is we who pay for the advertising budgets to promote the appearance of difference where there is little or none in substance. We also pay twice over for exorbitant packaging costs - nearly a sixth of average household food expenditure goes on packaging, and most of this ends up in landfill sites funded by taxpayers.

Choice enjoyed at one level often obscures or compensates for its loss at another

You could say this misses the point: don't consumers like selecting goods precisely on the basis of 'mere' aesthetic distinctions and isn't being allowed to do so very relevant to their sense of 'choice'? Well, to a point. Yet choice provided and enjoyed at one level often obscures or compensates for its loss at another. Aesthetic responses to products change as other choice-enhancing information about them becomes available. So, choosing is a complex business involving both the object chosen and a supposedly freely choosing subject. If the latter has only appearances to go on, and is ill- or under-informed about the nature of the range of options by those doing the providing - in this case the supermarkets

- then selective capacity is reduced and the 'choice' arguably cannot count as fully autonomous.

I'm not suggesting that shoppers could be told everything about the production and distribution of whatever they might buy, but there's no doubt supermarkets withhold information that would probably affect what their customers bought. How would we shop if, for example, foods were shelved according to the food miles they had travelled, or labelled with data on the carbon emissions and pollution involved in their production and transport; if packaging costs were indicated on items as a percentage of their price; if goods involving underage or sweatshop labour were itemised as such and shelved in a particular area of the store; or if deceptive marketing strategies ('loss leaders', 'pester power' devices and so on) were described to customers in the terms used within the industry? Can we pretend none of that would affect sales?

But that's only half the story. Supermarkets don't just manipulate choices within the store - they also limit choices beyond its walls. The expansion of the supermarkets, which now command 88 percent of the food market, has severely reduced the option to shop in more locally beneficial, diversified and greener ways. This creates 'ghost towns', with local economies trapped in a vicious circle of decline. Extensive urban car-use reduces the choice of pedestrians and cyclists to proceed in safer, quieter and less harassed ways. More local and ecologically beneficial farming practices and forms of food provision have lost out to supermarket gigantism, and small producers often go to the wall. And the supermarkets aren't just grocers any more - they're cutting in on the local pharmacy, post office, hardware store and funeral parlour too.

Viewed in a global context, to 'choose' supermarkets is to opt for a mode of providing basic commodities that massively contributes to the climate change that will, over coming decades, have huge impact on the life-choices of millions of people. It is therefore to opt against longer term well-being of both people and planet. Supermarkets, in short, are some of the most powerful players in a capitalist growth economy that lines the pockets of the wealthy while exercising an increasing stranglehold over the types of space we inhabit, the ways in which we spend our time, and the forms of enjoyment available to us. All this in the name of a suspect notion of consumer 'choice'.

How would we shop if goods involving sweatshop labour were shelved in a particular area of the store?

Since supermarkets have so far proved fairly indifferent to the negative environmental and social outcomes of their oligopoly, it now seems far-fetched to expect from them any form of green or ethical strategy that will seriously dint their profits. They'll just cherry-pick the bits that work for their own bottom-line, and that ultimately isn't enough. So it's up to us to by-pass supermarkets in favour of the rewards and pressures of alternative ways of food shopping. In effect, we need to shop as citizens, not just as consumers. That's a tricky juggling act, but shifts in transport policies, planning and economic regulation could make it a whole lot easier.

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Cliff Guy

How does town planning affect consumer choice?

In the debate about the growing power of the major supermarkets, the term 'choice' is used freely by both sides. The multiple retailers claim that shoppers are free to choose to shop anywhere they want; the popularity of superstores and supermarkets reflects people's desire to obtain a wide range of foods at low prices, in an efficient, high-quality environment. Opponents accuse the multiples of reducing choice by eliminating other types of food shopping.¹ So, what kind of 'choice' do people want, how is it affected by supermarket growth, and what (if anything) can the town planning system do about it?

How much choice do consumers want?

Research at the University of Lancaster indicates that many, if not most, consumers want a wide choice, both of places to buy food and of food items within those places.² An ideal choice of places includes not only the superstores run by Tesco, Asda, Sainsbury and Morrison, but also discounters like Aldi and Lidl, specialists such as greengrocers and delicatessens, and even local 'corner shops'. Discussions with shoppers show that the roles of each of these are widely understood and valued. A 'choice' simply between Tesco and Asda is not adequate.

Clearly the superstores (defined as over 25,000 sq.ft. sales area) offer the widest choice of items: not just between brands, but also basic, standard, and luxury quality; Fairtrade, organic and low fat/sugar/salt versions; and so on. Smaller stores (including many of the older supermarkets within town centres) cannot offer all this. However, small specialist shops also widen choice by offering fresh foods and luxury items unobtainable in the large supermarkets; market stalls compete well in terms of price and quality of fresh foods; and the corner shop wins in terms of convenience.

Does the seemingly inevitable growth of the largest multiples extend or reduce consumer choice? The answer is both, depending upon circumstances, and whose choice we are considering. Supermarket growth is accused of causing a decline in the numbers of other shops and, in the long term, this has certainly been the case. Yet this link is more tenuous than many commentators think. For example, the grocery market share of convenience stores (defined as under 3,000 sq.ft.) is actually rising, even if an increasing proportion now belong to Tesco and Sainsbury.³ And farmers' markets - of which there are now over 500 - steadily increase in popularity.

Does the location of stores affect consumer choice? Yes, especially for those who cannot regularly use a car for food shopping, though this is a small minority because many households who do not own a car get lifts to and from supermarkets. Choice is obviously also limited in remote rural areas. But, elsewhere, several stores of different types can typically be found within 10-15 minutes' drive time from people's homes or places of work. Many people see superstores owned by different companies as essentially similar, and tend to use the most convenient one.

Does town planning policy affect consumer choice? Yes, because planning permission is needed for newly built stores or for extensions to existing stores. Planners are told by central government advice to "[enhance] consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, and particularly socially-excluded groups".⁴ However, their powers in this respect are fairly limited. The guidance requires them to restrict new development to existing town and district centres, unless there is no "suitable and available site" within any such centres. But the multiples argue back: first, that savings found in

building on cheaper out-of-centre sites can be passed on to the consumer in the form of lower prices; and, second, that areas of greatest social exclusion are often edge-of-town housing estates, far away from town centres. Furthermore, where supermarkets have been built within or on the edge of town centres, they compete more strongly with existing food shopping within these centres.

Can planners help smaller retailers to compete with supermarkets? In direct terms, no: discrimination between individuals or companies in respect of planning approval is unlawful. A proposal to build a new supermarket can be refused only on 'planning grounds'. These may include the economic impacts upon other retailers, but only if the proposal is located outside an existing centre. In addition, any change in the type of retailing to be carried out from existing retail premises is not considered to be a 'material change of use', and does not normally require planning consent. So, for example, a Tesco Express store can legitimately replace a Spar grocer or even a non-food store, and there is little that planners can do about this.

Therefore, those who oppose the increasing domination of the market by large retailers should not rely upon the planning system to help. They should also remember that while most shoppers profess to support small shops, they vote with their feet for the multiples. Small shops will survive by offering the specialist items, quality of service and convenience which the large stores often lack.

¹ See for example, http://community.foe.co.uk/campaigns/real_food/supermarkets/index.html and www.tescopoly.org.

² For a summary of this project see www.esds.ac.uk/qualidata/support/q5049.asp.

³ www.thelocalshop.com/default.asp?Call=Article&ID=4552

⁴ Department of Communities and Local Government, *Planning policy statement six: town centres and retail*, para. 1.4.



Product stories are just a start if we really want sustainable shopping

Food that talks?

It's the end of a hard week and you're feeling peckish. You prepare fish and chips – it is Friday, after all – and eat out the back to catch those last rays of sun. Getting chilly, you turn on your patio heater, eat up and doze off...

You hear the familiar music first and then there's Parky, ever the affable chat show host, strolling down in front of you to introduce the evening's guests:

"From the ocean we have Cod, we have Organic Chip from Sussex, we have Cooking Oil from the rainforests of Indonesia and finally, all the way from China, we have the renowned outdoor enthusiast, Patio Heater."

As the show rolls on, their life stories unfold. Cod describes the unsustainable harvesting of the world's oceans and the collapse of commercial fisheries. He stuns the audience by predicting the last commercial fish will be caught in 2050.

Organic Chip tells the heart-warming story of her caring, chemical-free upbringing not far from the studio.

Cooking Oil almost brings Parky to tears with her account of rainforest destruction, the murder of wildlife and the exploitation of forest people. She enviously talks about her neighbours in the garden furniture industry, who enjoy high standards of sustainable forest management and certification under the Forest Stewardship Council (FSC).

Yet it is Patio Heater, the final guest, who shamefully steals the show. The studio audience gasp with shock when he reveals that in just one hour he squanders as much energy as 400 cups of tea. Hmm, tea... The thought jolts you awake. Funny dream, you think, or perhaps it counts as a nightmare. Aren't products that talk pretty scary?

Well no, I don't think they are. Actually, I wish products could tell us their story. And the first of five ambitions I have for the future of retail, and for the planet, is that one day soon a lot more of them will.

Ambition 1: products will talk!

Products need to tell stories. The story I want to hear is about the product's 'upbringing' and how that relates to the big environmental and social problems facing the world, not the 'product story' about the brand values the marketing department has imposed. Birds Eye doubtless has some key brand values, for example, but the real story is fish harvesting.

Ambition 2: we'll judge their stories against global challenges

Why should we care about a product's story? Because if we heard a whole shopping trolley's worth, it would read like a checklist of the big issues of our time. Things we buy are implicated in global warming, the depletion of fisheries, water scarcity and human tragedy. Unless we know that, we can't do much about it.

I want stories to be judged against these environmental and social issues. Globally, three challenges stand out:

- To eliminate poverty.
- To build a low carbon economy.
- To live within the limits of the planet's resources.

We know it already would take the resources of three planets for everyone to live the lifestyle we enjoy in the UK and, by 2050, global population will grow by half again – that's an extra 3 billion. If the planet was a supermarket and the history of mankind was condensed into 60 years – not many retailers are older than 60 years – the planet has to boost sales by 5,000 percent in just three years. No retailer could do that, yet that's what we're demanding!

Ambition 3: environmental impact assessment moves from stores to products

In practice, to judge product stories against these challenges they need to be told in detail. They need to be stories, sure, but stories packed with facts. They need to be based on thorough environmental impact assessments.

When a supermarket wants to build a new store it has to complete an environmental impact assessment of that building. But the same supermarket can then fill itself with products whose embedded carbon, natural resource use and pollution footprint have not been considered. There is a profound mismatch between the requirements applied to large buildings and infrastructure projects, and the shortage of even voluntary analysis by manufacturers and retailers of the products they sell. That needs to change, and fast.

Ambition 4: less green consumerism, more choice editing

Who should drive this change? Who is the audience for product stories? Is it retailers or customers? We often assume it's the customer, but my fourth ambition is that many of the big decisions are made by the retailer.

The growth in local food shouldn't be a huge threat to the gig box retailers

The UK government's Roundtable on Sustainable Consumption looked at 19 products where a greener version had taken a significant proportion of market share and concluded that all of them had achieved that share through the interventions of either government or business. The solution, they concluded, lies with the big brands and retail chains. It is the choices they make with their main product ranges that will make the difference between meeting global challenges and dismal failure.

The Roundtable introduced the concept of 'choice editing', where retailers use sustainability as a criterion for deciding which products to make available to consumers.

This brings us back to our fish and chips – in 2006, Wal-Mart, the largest retailer of fish in the world, announced that it would

There's Parky, ever the affable chat show host, strolling down in front of you to introduce the evening's guests



switch to sourcing all of its wild-caught fish from Marine Stewardship Council (MSC) certified sources over the next 3-5 years. This commitment was echoed in January 2007 by Marks & Spencer, which committed to sell only MSC certified fish by 2012. The palm oil industry and retailers have a roundtable on palm oil, some retailers are backing organics and, in April, Wyevale Garden Centres announced it was to phase out gas-powered patio heaters.

Ambition 5: size will not matter!

Some people hope that big box retailing will decline in favour of local farm shops and, when it comes to food, I too can see the huge opportunity for specialist and local food outlets. As people reconnect with their food and show greater interest in its life story it follows that local food will grow. This is a good thing – not because of food miles (I see that argument fizzling away) but more for freshness and the desire to support our local farmers. I also see more people growing their own food – not good news for any food outlet, big or small, but good for the planet!

However, the growth in local food shouldn't be a huge threat to the big box retailers. They can and will stock local. What's more, whilst they might not relish it, they could absorb the loss of that revenue anyway because they still command the market in so many other products – loo rolls, soap powder, toasters and DVDs, and tea, coffee and bananas, none of which have a local angle.

I think this is no bad thing. If the DIY industry was still small hardware shops we would have no Forest Stewardship Council,

and if the world's fish market was still small fishmongers the Marine Stewardship Council wouldn't exist either.

Imagine if Tesco or Wal-Mart only sold you sustainable fish, zero carbon chips, rainforest-friendly cooking oil and you couldn't get a gas powered patio heater anywhere! How much better off would the world be? Maybe not a lot, if we are just talking fish and chips, but imagine if every supper you ate for the rest of your life was zero carbon, helped reduce poverty and was harvested within the finite limits of the planet – that would be a huge step in the right direction. Imagine every single product you buy and use in your life having the same proud story. Who has the power to do that – your local farm shop or Tesco and Wal-Mart? The answer's both!

So size shouldn't matter when it comes to green retailing. If we allow both retail concepts to prosper we can have our low carbon, fair trade, sustainable, zero fat, cruelty free cake and we can eat it. Yes, I know that sounds ambitious – but then a lot is at stake.

Alan Knight is an independent advisor on sustainable development to retail. He is Products and Consumption Commissioner for the UK Sustainable Development Commission and chaired the UK Food Industry Sustainability Strategy Champions' Group on Ethical Trading. He also co-chaired the UK Roundtable on Sustainable Consumption. alan.knight@singleplanetliving.com

Where next for food retail?

How will we shop in fifteen year's time? Will supermarkets still exist? Which trends today point to where things will head? We asked ten leading players and commentators to place their bets...

The big question

Sue Dibb

It's 2022, you walk – yes walk, not drive – to your nearby food emporium. Here you top up with locally grown produce, meet a friend for a meal freshly prepared by the community chef and then pick a dish to take home to eat for supper with your extended family, living in a co-operatively owned block. You'll collect salad leaves grown in the shared polytunnel on the roof. Meat is now a luxury but champagne – thanks to global warming – is cheap and abundantly produced in southern England.

'Big box' retail still exists but only as local warehouses for the mundane things in life – recycled toilet paper, environmentally-friendly cleaning products and fair-trade staples. You could drive your electric scoot-cart, but the cost of parking and road taxes means it's cheaper to have monthly deliveries, automatically updating your order with a mobile organiser. Packaging is simple and refillable.

Crystal ball gazing is notoriously difficult – if the vision of the future I grew up with had come true, we'd all now get our nutrition from pills and packets, like characters from a '70s Smash advert. Yet, to create a more sustainable world we need to work out what it might look like in practice, so we can put in place the policies and incentives that will help get us there. That means understanding how current trends can be harnessed to promote greater sustainability, such as advances in technology, and which are taking us in the wrong direction, like our ever-growing appetite for cheaper 'stuff'.

Retailers have to play a big part in meeting the challenges of climate change and sustainable development, because of their influence within the supply chain and their direct interaction with customers. And they're on the case, with wind-powered stores, minimal packaging and local produce among the many initiatives underway. The question is not whether supermarkets and other retailers are willing to respond, but how far they will go.

Sue Dibb leads the UK Sustainable Development Commission's team on Sustainable Consumption and Business, where she is currently working to create a vision for sustainable retail that will help advise government. www.sd-commission.org.uk

Richard Perks

The supermarket is here to stay. Nothing on the horizon can challenge it, and for good reason. Whether in-store or over the internet, supermarkets have transformed our attitudes to buying food, offering a wide range at lower prices and reliable quality. They capitalize on economies of scale and that is why so few retailers dominate the food sector in Western

countries. Supermarkets have taken cost out of supply chains to the benefit of consumers.

Concerns over sustainability, the provenance of food and ethical credentials are still very much a minority interest. But supermarkets cannot afford to ignore them, particularly as they are backed

Signs of the times

Supermarkets are growing in size

from an average 35,100 sq. ft. in 1994 to 45,561 in 2004

and number across the globe

with 124 Tesco stores planned to join the 1,779 stores in the UK alone.

Quick-stop inner city shopping means more trips

rising from the current average of 1.9 trips per week.

Supermarkets employ nearly half the UK retail workforce

with 870,000 members of staff

but automatic checkouts are replacing workers

by using RFID technology to make orders via bluetooth and GPS.

Face-to-face selling is on the up in farmers' markets

with 500 springing up over the past 10 years

and organic box deliveries are also booming

with 300 schemes up and running

but they haven't dented supermarket profits

as Tesco announces an 11 percent annual increase to £2.5 billion!

Neva Frecheville

References at www.foodethicscouncil.org

Image © Claire Carter | www.clairecarterphotography.com

by considerable media pressure. Yet they are best placed to respond to changes in consumer attitudes, because they have the networks and expertise to handle them.

Supermarkets get a bad press these days, the victims of a virulent campaign from pressure groups acting for small stores and a media happy to publish grievances. But while small stores resent the fact that supermarkets are far more effective retailers, customers relish superstore services and visit them in ever-increasing numbers.

There is no going back. Markets, including farmers markets, could not cope with the demand or the vast array of imported foods which consumers have come to expect. In fact, only the supermarkets are in a position to respond to concerns about their food, its quality and where it has come from.

Richard Perks is Director of retail research at consumer, media and market research company MINTEL. www.mintel.com

Nick Monger-Godfrey

While global climate change is becoming a pressing issue for every major UK food retailer, the future of the British countryside is not being championed in the same way. Yet Britain won't stay 'green and pleasant' unless relationships between retailers and farmers are radically transformed.

As the NFU's 'Why Farming Matters' campaign points out, over the last 10 years, self sufficiency in indigenous foods has fallen by 15 percent. Defra figures show, furthermore, that farming output has dropped by some 18

percent over the same period. If this trend continues, large swathes of our countryside will be unrecognisable in 15 years' time.

Our farmers are custodians of the countryside – they maintain farmland, hedges, and coppices, providing habitat for wildlife and promoting biodiversity. There is a pressing need to extend the principles behind customers' enthusiasm for ethically traded products to domestic farming as well as the developing world. Over the next 15 years I would like to see farmers working in partnership with retailers – not for them. And I want to see farmers confident they'll earn enough to reinvest in their farms.

Waitrose has always strived to build up long term relationships with its farmers, based on honesty and trust, and we believe it is right to pay our suppliers fair prices. This commitment comes not only from the ethical trading principles at the heart of our business but also from the inside perspective we gain from owning our own farm. The 4,000-acre Leckford Estate in Hampshire supplies our shops with a broad range of products, including apples, mushrooms and free range chickens.

Our actions today as retailers will shape farming for future generations. And one thing is certain: a viable, thriving and diversified farming sector, once lost, will be lost forever, and Britain's countryside would be the poorer for it.

Nick Monger-Godfrey is Head of Corporate Social Responsibility at John Lewis Partnership, owners of Waitrose. www.waitrose.com

David Hughes

Twenty years ago, tediously, we used to queue up in the bank for cashiers. The ATM was mooted but some financial pundits argued a hole in the wall was too anonymous – that consumers would miss the human interaction, even if some bank tellers had less personality than a machine!

We're in a similar place now when it comes to food shopping. Consumer research shows that most supermarket shoppers view the experience as boring, tedious and stressful. In our consumer-driven society, this must change.

Technology will come to the rescue in the shape of Radio Frequency Identification (RFID) tags. Within 15 years, these will mean that most 'drudge' items that we buy on a regular basis (such as toilet paper, soft drinks and pet food) will be restocked by an invisible provider. An in-home inventory will be managed by a third-party provider via RFID technology.

Consumers like to shop but only on their own terms. We love to ponder products that have meaning in our lives. We browse, interact with the vendor and ask advice. These are the high-involvement purchases that become the heroes of slow food moments with family and friends.

In 15 years, then, we'll have less drudgery and more of the pleasure – e-tailers for the first and retailers for the second. As for whether the ruddy-faced, rotund, stripey-aproned butcher in their traditional looking shop is employed by Tesco or by a group of market-savvy farmers, well that's another story.

David Hughes is Emeritus Professor of Food Marketing at Imperial College London, and Visiting Professor at the University of Kent Business School and at the Royal Agricultural College. www.profdavidhughes.com

Carlo Petrini

Despite making hefty profits for major retail chains, the supermarket model based on agroindustry and economies of scale is unsustainable. It fails to provide good, well-produced foods, it is unfair to small producers and it shifts goods over needless distances.

This will change, as consumers demand tastier, eco-friendly food that conserves biodiversity and respects workers in the production chain. This is hard economic fact.

Shoppers will force supermarkets to review the way they operate and make the food they sell 'greener'.

Supermarkets won't vanish in the next fifteen years but I do think they will undergo a slow transformation towards specialisation.

In Italy, the Eataly superstore in Turin is a prototype of the future. It sells food of the highest quality – sometimes in limited quantities – carefully sourcing products with a close eye on 'food miles'. Then there's the Coop, which, working with Slow Food, stocks according to seasonality and origin.

As local and farmers' markets enjoy mounting success, supermarkets will ultimately have to adapt. How? By supplementing mass-produced foodstuffs with fresh, local, fair trade produce that is both tasty and sustainable. This trend is already happening, and it is here to stay.

Carlo Petrini is founder and president of Slow Food. www.slowfood.com

Malcolm Veigas

What does the future hold for the 35,000 plus market traders who offer an alternative shopping experience? With only 15 percent of food retail not governed by supermarkets, the markets industry is a bit player in the bigger scheme of things.

Yet we should remember that markets breed entrepreneurs. After all, Tesco started life on Hackney Markets, whilst Marks & Spencer can trace its roots back to the 'Penny Bazaar Stall' at Leeds Kirkgate Market in 1904. The foundations of today's global retail brands were laid in humble street markets. Could we see a repeat performance?

Competing against the retail giants is tough. For small independents it can be a David and Goliath struggle. But it needn't be. Over 15 million tonnes of fruit and vegetables are grown every year in Europe, and over a third of that is distributed through independent Wholesale Markets which serve over a million independent ambulant market traders. Even without loyalty schemes and all the other kit the supermarkets can muster, these traders can tap into the growing number of environmentally aware shoppers, who are increasingly looking for the good quality, locally produced, seasonal food that they sell.

Local produce markets, the Slow Food movement and British Food Fortnight will reinforce the value of buying local and supporting small business. Quality open air markets like The Borough in Southwark, Leicester and Bury, and Bradford's own bi-annual International Market Festival, will keep the theatre, soul and experience of markets alive and kicking for generations to come.

Malcolm Veigas is Head of Markets at City of Bradford MDC. www.bradfordmarkets.com

James Walton

Research conducted by IGD in 2006 showed that, for the first time, ethical factors have come to outweigh product quality as drivers of consumer choice. For 68 percent of adults and 58 percent of teenagers, a company's ethical stance is now more important than its quality, heritage or marketing. That's a big deal, and it's a sign of trends that will shape shopping for years to come.

Consumers, in the affluent West at least, are becoming more outward-looking. We no longer just want quality, nutrition and the basics that are good for us – retailers have to provide that just to be in the game – we now also demand that our food is produced responsibly. It is no longer enough for food to taste good. We want to feel good when we buy it.

If it wasn't for new technology and media channels this wouldn't be happening. It's because of them that we're more informed about the impact of our purchasing decisions and that we have time to care. So it is them that I'm watching to see where retail is headed next.

James Walton is Chief Economist at the food and grocery research organisation IGD. www.igd.com

Ella Heeks

Supermarkets are slick operations. They have evolved to provide very cheap, convenient, plentiful food, and have been allowed to generate significant external costs in the process. This is changing. Consumers are waking up to the real cost of supermarket food, and society can no longer afford to disregard the externalities.

Consumers see the effects of highly processed, transported and packaged food on the environment, society, and their own physical and mental health. In response, they are seeking out sources of simpler, healthier food, from people they can engage with and trust.

Supermarkets are no longer so convenient. Consumers don't want to plough the aisles, checking the small print, beset by ethical and health dilemmas, with nobody to help them. It's more convenient for them to browse a healthy, ethical selection, where they can relax and choose what they like – and chat about it with staff who know their stuff.

At the same time, government policy is likely to force supermarkets – along with all other businesses – to start paying the full cost of the pollution and packaging waste that they generate.

All businesses exist to meet consumer demand as best they can with the resources available. Supermarkets have done this brilliantly for some time. Now the nature of the demand and the resources available are changing dramatically. Supermarkets are badly positioned to handle these changes. Their supply chains and infrastructure have evolved to serve a different purpose, in a different context. Younger, innovative enterprises, such as Abel & Cole, have evolved to suit the current purpose and context – healthy food you can trust, with minimum externalities.

Ella Heeks is a director of Abel & Cole, the organic home delivery service. www.abel-cole.co.uk

Lucy Siegle

Multiple retailers have a genius for presenting society with a fait accompli. From M&S's Plan A to Terry Leahy on 'green consumerism', the message is that supermarket superpower is a fact of life – how else would we distribute food with such choice and convenience? At the same time, each retailer is also trying to show it is the one who takes the environment the most seriously. We've had banana wars, bread wars, milk wars. Now welcome to the green wars as each retailer battles to a carbon neutral nirvana.

This, combined with the burgeoning number of supermarket stores, makes it difficult to conceive of any other way of buying food. As retailers strike a green pose, there's no doubt that consumer concerns will be mollified. So at this point we collectively lose track of the central argument: is this business model the most sustainable and effective way of feeding the population?

In fact, this retail model has proved woefully inadequate at assessing natural capital because it is so fixated on conventional capital. We have seen this for the last two decades, as supermarkets have made the supply chain carbon, energy and waste heavy – relying on air-freight, for instance, and fuelling demands for cosmetically perfect food. Should we now trust the same retailers to work out their own environmental footprint? Tesco has already pledged to use symbols to show carbon calories – we know green consumers love a label but what will this really achieve?

The default rejoinder from all the big retailers is that they can offer sustainability at scale by mainstreaming green consumerism. But is there any evidence they can? As they scramble for a piece of the non-retail pie, you hear M&S and Sainsburys compete over the amount of West African fairtrade cotton they have bought, but this is just a tiny fraction of all the cotton they use – how unfair is the rest of it? As the environmental backdrop worsens, their huge, complex supply chains could become a liability.

In fifteen years, we could find that the business model that adapts best is bespoke retailing that takes a whole 'ethical' view. These are likely to be smaller retailers who have strong relationships with overseas producers (such as fairtrade or equitrade), invested in sustainable water management, or sought to increase national food security by growing locally. Carrier bags will go as the oil

price rises, and supermarkets will look increasingly different. But it's hard to conceive that the supermarket will disappear any time soon, even to be superseded by a retail model which understands the true value of natural capital.

Lucy Siegle writes the Observer's ethical living column. She also contributes to magazines including Marie Claire, Grazia and Elle. observer.guardian.co.uk

Judith Whateley

Supermarkets are powerful now but that will change if we seize the opportunity. Their growth and clout will be curbed by caps on market share at the local and national levels, by a grocery market regulator, by increased opposition to new stores from local communities, and by sustained campaigning to highlight the negative impacts of supermarkets.

We need to make the most of the time this buys us to build different ways of producing and distributing food – different because they are democratic and sustainable. People worry that supermarkets may be taking over their lives and their neighbourhoods, and they are more interested than ever in healthy, local and fresh food, but in the absence of alternatives on any sizeable scale they'll keep pacing down the same old aisles. To offer that alternative we need structural change, not just a smattering of small initiatives. And so far, I think, we've lacked the vision that takes.

But if we fail to provide an alternative, then by 2022 supermarkets will be bigger and badder than ever. They'll have captured even more of people's food budgets by scaling up their 'local' food ranges and introducing schemes that look green and right-on. We'll have little choice but to shop at the 'big two', as specialist shops and farmers' markets struggle in the face of rising rents and rates and discriminatory legislation.

So, if we want a fairer, more sustainable future, we need to think big too.

Judith Whateley campaigns on corporate power in the food system and helps co-ordinate Tescopoly, an alliance of organisations concerned with the negative impacts of supermarket power. www.tescopoly.org

Is a health driven food industry not what we wanted? Watch what you wish for!

I'm due to have a baby in a month and I've been giving a lot of thought to how her food tastes will develop. In pregnancy, I have continued to eat as I usually do – buying seasonal produce from the local market (I live in central France). Did she get fed up with cabbage, leeks and sprouts during the winter months, I wondered? Now I'm cheating a bit, sneaking in the odd Provençal tomato, hoping she'll sense their sweetness *in utero*. Next (all being well) comes the breastfeeding. Funnily enough, the French state pregnancy guide warns off eating garlic when breastfeeding in case the baby hates the taste; I'll give it a try anyway, just to see how she responds.

Then onto the world of solid foods. Like many mothers, I plan to purée the foods my husband and I eat, without sugar and salt (as is advised). But here comes the time I fear: the time when the food industry will try to persuade me, as a mother, what's healthy for my baby. I may be wary of it, but I am also aware that the multinational food industry is relying on people like to me to help generate their future profits.

'Health and wellness' is, after all, the latest industry megatrend. Food companies are falling over to redefine themselves as 'health and wellness' companies. Danone's mission statement is to "bring health through food to the largest number of people". Mars launched a Nutrition for Health & Well-Being unit in 2005, aiming to be a "trusted partner in healthy lifestyles". In January, the International Business Leaders Forum reported that it's in companies' best interests to "raise their game when it comes to consumer health issues, particularly obesity".

Globally, this is leading to three related changes on our supermarket shelves. First, we're seeing more new and reformulated 'healthy' products. In the past few months alone, Walkers crisps (part of PepsiCo) announced their switch to sunseed oil; Coke unveiled Diet Coke Plus, complete with niacin, Vitamin B6, magnesium and zinc; and the Dutch TOP Institute of Food and Nutrition

reported it is engineering ingredients for its industry partners to "prevent obese people from developing diabetes". This month, the new journal *Kids Nutrition Report* headlined Unilever's new 'brainfood range': lunchbox snacks and flavoured milk drinks to help mental development – just launched in Turkey.

A second trend is endorsements of these foods by health associations. When I lived in the United States, it seemed that every breakfast cereal was endorsed by someone. I kept a few packets for posterity, like Fruity Burst Cheerios, endorsed by the American Heart Association because it's low in saturated fat – despite its high sugar content. The latest move comes from Australia, where the National Heart Foundation has lent its 'health tick' to nine McDonald's meals.

The final change is placing health at the centre of food marketing campaigns. We're going to see more nutrient and health claims, more depictions of health on packaging, and more advertising and promotion that tells us eating these products is the way to health. In Brazil, late last year, I saw a Coke ad: drink Coke because it will bring you "hydration".

But isn't this what we have all wanted? A more responsive, health driven food industry, right? The World Health Organization and many national governments have asked the food industry to change their product portfolios to help fight against obesity, and that is just what they are doing. But I'm reminded of a story a friend told me. She'd met a neighbour crying in the street a few months ago, whose dentist had said her baby's teeth were rotten. She was confused, she sobbed, because "I try to give my baby healthy foods". It turned out that meant foods she thought were healthy, like kids' yoghurts.

I took a trip to my nearest hypermarket to check out these yoghurts for myself. In a dazzling, cartoon-filled four metre stretch of aisle, I picked up some Tout petits filous "specially adapted for babies from five months", picturing a baby and labelled

"free from preservatives", "natural source of calcium" and "enriched with iron". But a closer read and some arithmetic revealed each serving to contain over 10g of sugar. Another brand declared itself as suitable for babies from four months and had nearly 15 percent sugar. And there was me, remembering the advice I'd been given, that breast was best for six months and babies shouldn't be fed added sugar.

Yet these types of products represent the health and wellness trend – and, often, genuine industry good will. I can already see the appeals for greater regulation in a few years time. Back in January in the United States, Cadbury Schweppes was forced to withdraw its "All Natural" advertising from 7-Up, following the threat of litigation from an NGO – who pointed out that high-fructose corn syrup is not a natural product. Governments may have asked industry to do it, but they cannot escape from the debate about what is and what is not 'healthy', and their role in protecting consumers from confusion.

As for me, a soon-to-be mother, I want the message of good food and health to come from me, not from some new-fangled product or a health marketing campaign. I just hope I can get on with instilling positive food experiences in my child without the constant need to fend off other messages. Wish me luck. I think I'll need it.

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Opinion: Corinna Hawkes

Bringing fair trade home

How can Mexican farmers get better prices domestically?

WORLDVIEW



Cynthia Marin Jiménez

Cynthia Marin Jiménez ran an academic programme at the Autonomous University of Yucatan, Mexico, which involved working with students, teachers and researchers in development projects with Indigenous communities. She has an MBA from ITESO University and has volunteered at the Food Ethics Council. chanbej@yahoo.com

Fair trade labelling started in Mexico when, in 1988, coffee farmers in Chiapas teamed up with groups in the Netherlands and the Max Havelaar label was born. Since then, fair trade has gone from strength to strength in Europe. But the country that initiated this trading partnership has not seen the same progress. Mexican coffee and honey are important in global fair trade, but the concept is almost unknown in the domestic market. Mexican small farmers and Indigenous communities have few opportunities to sell their goods for a fair price within the country. For these small businesses, management, resources, finances and quality are the principal worries and obstacles, and, for the most part, market prices are low.

I have been working with an NGO network in Mexico's Yucatan Peninsula, the homeland of the Mayan Yucatecan Culture and the main honey producing region in the country. These NGOs work in development projects, based mainly on organic agriculture. A considerable percentage of the honey produced in the Yucatan Peninsula goes to fair trade markets. Yet a certain amount of honey does not fulfil export requirements, mainly because of high humidity at the beginning and at the end of the season, and is therefore sold domestically. This honey is of good quality, but the price it is sold at in the local market doesn't reflect that. Producers of vegetables and handicrafts face the same problems. We have been helping producers to address this by finding new ways for them to sell on the domestic market.

Getting a fair price for local produce in Mexico is harder than that you might think. It is easy to buy goods cheaply, whether from markets, small shops or supermarkets, and the concept that you might buy in ways that support the local economy has barely caught on outside the big cities. It is not easy to find retailers willing to buy small volumes of products, even when they offer better quality to consumers. That's particularly true in small cities like Merida, the biggest in the Yucatan Peninsula.

One method groups have used to get a fair price for local produce is the box scheme, known as a Sabucan after the Mayan word for a jute bag. This is new to Merida. An NGO called MAC (Misioneros, A.C.) provides training for six or eight small farmers (including women) to show

them ways of working together as a co-operative, as this way they can offer a greater variety of vegetables and fruits. They can also add some home-cooked foods to the bag, for example corn bread, honey sweets, chilli sauce, chocolate bars and so on. Customers of the scheme receive a 6kg bag of local fruit, vegetables and additional homemade foods for an equivalent of £6.00 (\$120 pesos) delivered to them every two weeks. The NGO subsidises distribution and does the deliveries, but is working with the farmers to make the scheme self-sufficient.

One method groups have used to get a fair price for local produce is the box scheme, known as a Sabucan after the Mayan word for a jute bag

Initial results were good, mainly because the majority of buyers were people from other NGOs, relatives and friends. Trying to increase the number of buyers is the next target. The challenge is to do this within a minimal budget – a familiar problem facing small projects that depend on external funding before they can sustain themselves.

In spite of these difficulties, the farmers involved have been happy with the results and, for the most part, have adopted the box scheme formula. Without any help from the government and without any policy developments to protect the small local farmers, the scheme is working. With volunteers helping to increase the sales, Sabucan could become a realistic option for small farmers competing in the domestic market. There's still vast progress to be made, but we think we're heading the right way to bring fair trade home – so producers get a fair price on the domestic market and not just for their exports.

Organic on the up

Good news for UK producers

CAPITAL CONCERNS

Meg Brown is Socially Responsible Investment Analyst at financial services company Citigroup. meg.brown@citi.com

Christmas and New Year saw record supermarket sales of premium own brand labels and each of the major retailers benefited from strong sales of organic foods. Their trading statements were littered with comments about consumers' interest in 'ethical' products – the table below lists some examples.

What's behind this trend? Well it's partly to do with health. Until now, the media and campaign groups have told consumers a confusing story about the health benefits of eating organic food. Recently though, evidence has emerged that consumers do benefit – or, at least, avoid potential harm – by going organic. Researchers at Liverpool University during 2006 found that the organic milk they sampled was higher in poly-unsaturated fatty acid, particularly Omega 3, than non-organic milk throughout the production year. Beef produced from animals fed a diet high in forage, rather than grain, has a similar benefit, and organic standards require that cattle be fed mainly forage. The Food Standards Agency says that "eating organic food can help to minimise consumption of pesticide residues and additives".

An organic shopper who believes that the accepted nutritional differences in organic food will benefit them or their children, or that eating fewer pesticide residues exposes them to fewer

risks, is making a rational health-based choice in the context of ongoing scientific uncertainty. This accumulation of evidence supporting organic produce, coupled with ongoing food scares, is likely to continue to underpin the growth in this market, which the Soil Association projects will rise to over £2.5 billion by 2010.

Importantly, it isn't just the usual suspects buying into this trend. According to AC Nielsen, some 80 percent of UK households bought organic foods at some time in 2006, and they now account for almost two percent of total supermarket till sales. A significant change in recent years has been the increase in lower income groups entering this market – around 50 percent of lower income groups occasionally purchase an organic food item.

Marks and Spencer's high-profile 'Plan A', which includes a commitment to triple sales of organic food, will raise the pressure on their competitors and will further boost the 'ethical' trend. The growing focus on local sourcing, a response in part to criticism over high imports of organic food, makes this a big opportunity for UK food producers. For a sector that's suffered in recent years, that's seriously good news.

This article is adapted from a research note published in February by Citigroup's Sustainability Research Team.

Company	Comment
Asda	"With customer numbers up, the re-invigoration of our food business with better quality produce, more premium and organic ranges and the widest choice of local products, this proved to be the perfect Christmas present for everyone that shopped with us over the festive period," said Andy Bond, president and CEO of ASDA.
Morrison	Wm Morrison said sales of The Best range were ahead 40 percent
Marks & Spencer	Marks and Spencer is thought to have seen sales of organic produce rise by half over the six-week Christmas window (source <i>Financial Times</i> , 16th Jan 07)
Sainsbury	"It was a story of quality foods at Christmas," Justin King (CEO) said, describing growth at the top end as "extraordinary". The group's Taste the Difference range jumped by 20 percent. The chain sold twice as many British organic and premium range turkeys as it did the previous year. There was a 50 percent jump in sales of free range products. Sainsbury claims 30 percent of the UK market for organic food, which it says is clearly entering the mainstream. It now has 430 own-brand organic lines and around 15 percent of the milk it sells is organic
Tesco	Organic foods were up by 39 percent. The Finest range notched up record sales of £50m during Christmas week, with sales of Finest meat and poultry products ahead 55 percent on 2005 levels. Sales of fresh organic ranges were up 39 percent, with organic turkey sales double the levels of a year earlier

Source: company and media announcements

The Business Pages

Can retailers save the world?

Tom Berry

It was back in October 2005 that Lee Scott, the CEO of Wal-Mart, started a wave of groundbreaking sustainability announcements from the supermarket sector. He committed Wal-Mart and their UK subsidiary, ASDA, to initiatives that include sending zero waste to landfill, sourcing all their energy from renewables, and selling more sustainable products. Six months later, Sir Terry Leahy outlined Tesco's 10-point Community Plan and, in January this year, he set out their plan "to deliver a revolution in green consumption". He promised independently audited cuts in CO2 from the company's operations, carbon labelling on all products and a thrust to make green choices available to millions of consumers. This announcement came in the same week that Marks & Spencer published their £200m 'Plan A', promising to cut waste, sell significantly more fair trade and organic products, and make the company carbon neutral. Justin King of Sainsbury's, has also made big sustainability commitments and said environmental and ethical issues are core business drivers for them in 2007.

Will these plans really have a lasting impact? I should declare an interest here and say that all of these companies (with the exception of ASDA) are partners of Forum for the Future. But we're not alone in believing that these announcements are very good news, for both the retail sector and the planet.

So why such good news? There are a number of reasons. Respected business leaders such as Stuart Rose and Terry Leahy have made their commitments very publicly. When they talk about the importance of environmental and social issues, other business chiefs will listen. The sheer size and clout of these companies also means that they can radiate impacts up and down their supply chain. Used in the right way, the retailers' powerful position will enable incredibly positive change across the food industry. And their reach allows these companies to mainstream sustainability for all consumers, not just the affluent or the 'green'.

However, there are more fundamental business reasons why sustainability will stay at the forefront leading food retail

companies of the future. For a start, retailers' growing emphasis on sustainability will continue to protect their licence to operate. These companies are so big, with such major influence, that they risk becoming lightning conductors for all kinds of opposition. That means they have an incentive to become good corporate citizens across a whole range of environmental and social issues.

The growing sophistication, awareness and demands of customers are probably the most significant drivers that will keep these issues at the forefront of decision making for some time to come. Justin King said recently, "Green issues and health concerns are now firmly rooted in the mainstream consciousness and I expect them to become ever more important." The supermarket industry is hyper-competitive and sustainability has become a key issue in their competition for customers. Addressing sustainability is now a matter of survival for such consumer-led companies.

In addition there is brand positioning. Marks & Spencer and Waitrose have always been high-end, high-quality and higher-price players. They clearly realise that their brand will be reinforced and their customers kept loyal by tackling sustainability issues. This is great news – there is enough of an affluent and concerned market to drive ahead this change. This trend can only grow – for

example, the market for fair trade products is expected to grow by nearly 140 percent over the next five years. Sustainability is also an increasingly important part of 'premium brand' positioning – one of the fastest growing market segments for all consumers, not just the affluent – at other supermarkets too.

Tesco, Sainsbury's and Asda play a crucial role in making sustainable products and services mass-market. Tesco says that customers "...want our help to do more in the fight against climate change". Linking products and promotions to environmental impact, ethical trade, or local sourcing already provides some significant opportunities in a number of categories. At the moment, however, most shoppers still put price and quality way ahead of ethical and environmental issues. Tesco has promised to help remove this price barrier, moving sustainable choice into the mainstream. Others will follow, if not beat them to it.

So, given all this great news, what's still needed? First, the retailers need to make their ambitious campaigns a reality. On launching Wal-Mart's plans, Lee Scott said, "These goals are both ambitious and aspirational, and I'm not sure how to achieve them..." and Stuart Rose said, "This is a deliberately ambitious plan. We

don't have all the answers...". Many of the developments in the past 18 months have been groundbreaking *commitments* rather than groundbreaking *performance*. Actual change has only just begun.

Second, all the retailers have said they need to work with suppliers, partners and government to make the plans a reality. To make a real difference, they will also need to work with each other. This has started and the work on 'collaborative distribution', led by the IGD in the UK, is a great example of action across industry. Yet, in such a hyper-competitive industry, more work needs to be done to ensure that collaboration delivers. Take the area of waste. M&S has committed to restricting the range of materials it uses in packaging, Tesco to labelling according to whether it can be re-used, recycled or composted, and Sainsbury's to dramatically increasing the amount of compostable packaging. To truly make it easier for consumers to recycle, there will need to be some consistency in these developments across all retailers (as well as in local government recycling rules). From the point of view of a supplier, for example, something as simple in theory as aligning the differing shelf widths in stores would allow them to make the growing amount of 'shelf-ready' packaging more efficient at source. Competition helps stimulate innovation but in some areas collaboration, or at least agreement, is needed to establish common boundaries and goals.

Third, there is more work to do on helping consumers to make more sustainable choices. An influential report called *I will if you will*, published last year by the Sustainable Consumption Roundtable, concluded that we need to make the right choices much easier for people to take. In this spirit, supermarkets are doing more and more 'choice editing', on fair trade, organics and climate change. For example, as of March this year, Sainsbury's has sold only Fairtrade bananas, and Waitrose pledged this month to selling only organic or Leaf Marque fresh and frozen produce by 2010.¹ Tesco's commitment to "work with others to develop an accepted and commonly understood measure of the carbon footprint of every product we sell..." is a groundbreaking step in providing customers better information to enable more sustainable choices. However, there is a danger that some of these schemes in the pipeline won't resonate with consumers, or that the proliferation



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of competing labels and campaigns will leave the consumer more confused and less empowered than before. More work is needed to understand how climate change, and sustainability more broadly, can best be communicated to consumers to change their behaviour.

Last, and most fundamentally, the retail industry of the future will need to address both the type and level of consumption that they promote. Products will need to be 'good' across their life-cycle even if they don't fit in one of the niches like fair trade, organic or low carbon. In addition, retailers will need to address ways in which to decouple increased material sales and financial growth. UK consumers throw away seven times their bodyweight in rubbish each year, which includes about a third of all the food they buy. Reducing packaging, promoting lower carbon products and making more lines fair trade are all steps in the right direction. However, retailers will need to work out how to make money not only from helping consumers buy more of the 'good' products but also by helping them buy *better*, not *more*.

Putting sustainability right at the heart of creating value will lead to a fundamentally different food retail environment in the future. Forum for the Future is currently working with Tesco, Unilever and industry opinion leaders to try and understand what such a sustainable retail future might look like. We hope this kind of work will help to ensure the pace and depth of change is enough to meet the urgency of the problems at hand. Commitments are good, but significant change is what we really need.

¹ In order to achieve LEAF Marque status, farms have to demonstrate high standards of environmental stewardship.

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Green grudge

Vicki Hird

The big supermarkets are trying very hard to convince us that they are green. In fact some, with business good sense, are actually doing useful things like introducing fully labelled compostable packaging (Sainsbury), keeping GM out of most of the food chain (M&S), cutting energy use per store (most), and signing up to a sustainable palm oil roundtable (all). They've come out with Community Plans and Plan As and Responsible Retailing Initiatives and so on...

But Friends of the Earth has, consistently, been a bit grudging with its praise. Why don't we welcome these initiatives with open arms? Well we could, but we never have much time here for praise. And we have even less of it when supermarkets are shouting loudly about their green actions in the media but undoing any good deeds behind the scenes. How? By undermining the local planning system, building more and larger stores where communities don't want them; by expanding at such a rate that no local stores can compete and their greenhouse gas emissions grow; also by treating suppliers and farmers here and overseas so badly that workers can't earn a living wage and the farmed environment gets trashed. Low farm prices mean we're losing three dairy farmers a day and even the Environment Agency recognises the environmental damage this causes.

So we may, on occasion, give a little pat on the back. We may also go into supermarket HQs to guide them in their endeavours, if we have time. But we're under no illusion – the fact is they don't want to change the business model that gives rise to all these problems, and that's why we need government to change it for them. That's not so cosy but it's much more effective.

Vicki Hird campaigns on supermarkets at Friends of the Earth. vickih@foe.co.uk

SUPERMARKET PLEDGES – CRITICS' CHOICE

Dax Lovegrove, Head of Business & Industry Relations, WWF

Pick of the bunch: Marks and Spencer's Plan A is a superb action plan that tackles a wide range of sustainability issues and demonstrates a real commitment to managing the retailer's extended footprints.

Bad apple: Tesco's recent announcement shows good intentions for incorporating the lifecycle of its products into its carbon management. However, it is slow to engage on broader supply chain impacts.

Fay Mansell, Chair, National Federation of Women's Institutes

Pick of the bunch: Sainsbury's removed all carrier bags from the checkouts for a day and promoted the use of re-usable bags by giving them away free to customers in an effort to change customer behaviour towards carrier bags.

Bad apple: News that Asda sells individually wrapped dried apricots.

Harriet Lamb, Director, Fairtrade Foundation

Pick of the bunch: Commitment by Sainsbury's to switch ALL their bananas to Fairtrade and their willingness to engage so proactively with smallholder groups and with the trade union movement to meet that commitment.

Bad banana: Asda/Wal-Mart slashing the price of bananas to 70p per kg, triggering another round in the price war that is so damaging for the banana farmers and workers who pick up the tab in the end.

Andrew Simms, Policy Director, the new economics foundation and author of *Tescopoly: how one shop came out on top and why it matters*

Pick of the bunch: The Co-op for its level-headed assessment of the limits to biofuels.

Bad apple: Tesco's massive hypermarket expansion plans that lock-in car-based shopping and surgically remove the economic heart of communities to retail parks.

reviews reading



Trust in food: a comparative and institutional analysis
Unni Kjøernes, Mark Harvey & Alan Warde | 2007 | Palgrave

In case anyone thought worrying about food was a peculiarly British habit, this book describes how almost every European country has suffered recent crises of consumer confidence. From avian flu to epidemic obesity, today's threats, scandals and panics are as global as the food supply chains that spawn them. Comparing six European countries, Kjøernes, Harvey and Warde ask what sustains trust in food and what nurtures scepticism.

They find that confidence is relatively high in countries that have been particularly plagued by food problems, while distrust is at its most pronounced in their study

Consumer attitudes to food standards 2007 | Food Standards Agency

A report examining shopping and eating habits in the UK, as well as concerns about food safety, hygiene and labelling. The results come from interviews with over 3,500 adults. Its most intriguing finding? Probably that "the most popular claimed snack was fresh fruit". NF

Feeding people is easy

Colin Tudge | 2007 | Peri Publishing
An upbeat manifesto for 'enlightened agriculture'. Tudge calls for a renaissance in our food system, so it is run not by bureaucracies and global corporations, but by and for humanity. NF

Food habits and consumption in developing countries: manual for field studies
Adel den Hartog, Wija van Staveren & Inge Brouwer | 2006 | Wageningen Academic

A manual for food professionals and students on how to collect data about what people eat. This is a fascinating book that ranges from the detailed advice on how to measure food consumption to some hefty questions about food and culture. It opens by citing the *Malawi Cook Book* on the merits of insect eating. NF

Our farm: a year in the life of a smallholding
Rosie Boycott | 2007 | Bloomsbury

An amusing and eminently readable account of the author's move from city-living newspaper editor to country-loving pig farmer. Boycott has sharp words to say about the effects supermarkets are having on farming and rural life in the UK. NF

The political economy of genetically modified foods

Robert E. Evenson & Terri Raney | 2007 | Edward Elgar

A reader that examines the complex political debate surrounding transgenic crops. It begins with an impassioned exchange over the implications of GM crops for food security in developing countries. NF

in Italy, well-known for its focus on fresh, high-quality food.

The book argues that trust and distrust are social and institutional affairs, emerging out the relationship between people, the state and businesses, rather than individual responses driven simply by information shortfalls or media scaremongering. So, it is highbrow stuff and it doesn't offer off-the-peg solutions for rebuilding public trust in food. But that's the key practical point. It's the tricky things, like improving public involvement in decision-making, bolstering the independence of regulatory institutions and ensuring public scrutiny, that will make a difference – rebuilding trust isn't as easy as convincing people that the experts know what they're doing and everything's really alright after all. NF

Review of the Scottish Diet Action Plan: progress and impacts 1996 – 2005
2006 | NHS Health Scotland

This policy review considers the impacts of the SDAP to date and identifies strategic priorities for the future. Recognizing how macroeconomic changes in food retailing and catering have shifted eating patterns, it evaluates the successes and failures of the last ten years. It concludes that the current national dietary profile is unacceptable and that a radical rethink is needed to improve health and diet across the board. NF

The regulatory challenge of biotechnology: human genetics, food and patents
Han Somsen (ed.) | 2007 | Edward Elgar

An edited collection that sounds technical but thinks big. Looking at genetically modified foods, human genetics and patent law, the authors explore how regulatory systems might cope with the great diversity of issues surrounding biotechnology. NF



The history of world agriculture: from the Neolithic age to the current crisis
Marcel Mazoyer & Laurence Roudart (translated by James Membréz) | 2006 | Earthscan

A thoughtful and fact-filled narrative of how agriculture has influenced human development. More than just a history book, it considers how the world will feed itself in future under growing environmental and demographic pressures. FP

Farm policy reform Preview

Is a lean, mean CAP best for people and planet?

As Europe gears up for further reforms to its controversial Common Agricultural Policy, the Autumn '07 edition of *Food Ethics* explores how far freeing trade will support sustainable development:

- Is out-and-out liberalisation the only game in town?
- Are payments for greener farming an unfair subsidy?
- How can the EU raise environmental standards without dumping problems abroad?

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reviews eating



Colin Tudge's latest book, *Feeding people is easy* is available from Peri Publishing. He is a member of the Food Ethics Council.

To Marks and Spencer's for lunch. What a treat! Emporium still of the world's best-value underpants and now, increasingly, together with Waitrose, the principal food hall of the middle class, especially the middle class in a hurry. Alas! The café in our local M&S in Summertown, North Oxford, does not, as I'd hoped, offer a daily cottage pie or an oven-fresh lasagna or even egg, beans, and chips, hearty but vegetarian and virtuous. It was just sandwiches, cake, and little plastic bowls of chopped, exotic fruit, fruit juices, coffee and tea. But then this is what many people call lunch – so why not give it a try?

I'll tell you why not. It was expensive, and not very nice.

Isn't it odd how, in the inflation-free Britain of Gordon Brown, everything that any normal person would want to buy seems to have doubled in price these past few years? Mortgages, fares and – above all, it seems – eating out. The free-range egg and watercress sandwich with malted wholegrain bread, with statutory mayonnaise, cost £2.50; and the red salmon and cucumber in white bread, again with the all-purpose, ever-present mayonnaise, cost £3.00. A pound has become the kind of sum that tramps expect you to give them for a cup of tea (though that would only buy half a cup in many chains).

Even so, good sandwiches are a grand thing, and if they had been brilliant, I would have paid in good heart. The essence of a sandwich is the bread, and bread – proper bread – has only three ingredients, possibly four: flour, water, yeast, and perhaps salt; though traditional bakers may legitimately add other things for special effects. It should be kneaded, have plenty of time to 'prove', then be knocked back before baking.

The bread in which M&S wrapped its egg and watercress contains, so the label on the plastic box brazenly informs us, wheatflour, water, malted wheatflakes, yeast, malt flour, barley fibre, molasses sugar, salt, dried wheat gluten, soya flour, vegetable fat, salt substitute potassium chloride, emulsifier E472e, Flour Treatment Agent, and Ascorbic Acid. Though it was undoubtedly served fresh it seems designed, above all, to last: two days after the recommended sell-by date, the remains in my fridge are as moist as ever, and as unpleasant as ever. The white bread around the salmon lacks the molasses but has more E numbers. Two of those four quarters also made it only as far as my fridge, en route to the local geese, who live largely on crisps at this time of year and are made of stern stuff. The carrot cake, my wife declared, was dry and over-sweet. Perhaps it's matter of taste. But cake should not be dry. The chopped exotic fruits were almost without flavour except for the grapes, which were OK. The coffee (Americano) was Fairtrade and very good; a definite plus on both counts.

Are we just Moaning Minnies? Well, perhaps. But I remember when Britain was far poorer than it is supposed to be now: we were still getting over World War II. Apart from Joe Lyons, there weren't many catering chains. But there were what came to be called 'caffs'. Cheese rolls (3d), and tomato rolls (3d), and cheese-and-tomato rolls (4d), were standard fare. And they were good: simple, filling, and tasty. This isn't just nostalgia. I still make them, with bread from Maison Blanc and local cheese, and they taste as they always did. But these days you have to live in a fancy university town or some well-heeled equivalent just to get simple good stuff that people who were not rich, and lived in poor societies by modern standards, could take for granted. How is that progress? Why do we now achieve so much less with so much more money and technology?

That of course is another story. Meantime, if you find yourself in Summertown, go to the Lebanese café opposite M&S for dish-of-the-day (lamb and beans, perhaps) or falafels and baklava for a reminder of what food can still be. If we ignore the big chains, perhaps they will go away.



© Ruth West

Marks and Spencer
Summertown, Oxford

- Overall *
 - Fairness **
 - Health **
 - Animals **
 - Environment *
 - Taste *
 - Ambience *
 - Value for money *
- (maximum five stars)

1st Jun '07	Peter Singer on the Ethics of our Food ICA - Quote Food Ethics for discount on booking! www.ica.org.uk London, UK
4th Jun '07	On Target? Environmental Policy and the Climate Change Bill TUC www.tuc.org.uk London, UK
5th Jun '07	Food for the Future: the Peter Roberts Memorial Lecture Compassion in World Farming www.peter-roberts-lecture.org London, UK
11th Jun '07	The Guardian Climate Change Summit 2007 The Guardian environment.guardian.co.uk/climatesummit London, UK
12th - 13th Jun '07	3rd Annual Obesity Europe Conference Epsilon Events www.epsilonevents.com Brussels, Belgium
13th - 15th Jun '07	Water for a Changing World UNESCO-IHE www.unesco-ihe.org/news/symposium.htm Delft, Netherlands
17th Jun '07	Sustainable Distribution 2007 IGD www.igd.com London, UK
18th - 20th Jun '07	2nd International Symposium on Trace Elements and Health Helsinki University www.viikki.helsinki.fi/tracel2007 Helsinki, Finland
20th - 21st Jun '07	Inspiring Futures: Creating and Leading Sustainable Enterprises Impact www.impact-dtg.com Windermere, UK
25th - 26th Jun '07	Climate Change: Politics vs Economics Chatham House www.chathamhouse.org.uk London, UK
26th Jun '07	Water Framework Directive Conference: Progress and Implementing WFD Coastal Management for Sustainability (CMS) with CIWEM www.coastms.co.uk London, UK
1st - 4th Jul '07	The Royal Show 2007 RASE www.royalshow.org.uk Warwickshire, UK
2nd - 5th Jul '07	Environmental and Rural Sustainability Through ICT EFITA & WCCA www.efitaglasgow.org Glasgow, Scotland
9th - 11th Jul '07	EU Emissions Trading 2007 Environmental Finance www.environmental-finance.com/envfin/conferen.htm Brussels, Belgium
27th - 29th Jul '07	Badger Trust Annual Conference Badger Trust www.badgertrust.org.uk Derbyshire, UK
12th - 18th Aug '07	World Water Week: Striving for Sustainability in a Changing World Stockholm International Water Institute www.worldwaterweek.org/index.asp Stockholm, Sweden
26th - 28th Aug '07	Marketing of Organic and Regional Values International Federation of Organic Agriculture Movements (IFOAM) www.ifoam.org/events Schwabisch Hall, Germany
31st Aug '07	Organic Food Awards Soil Association www.soilassociation.org/foodawards Bristol, UK
1st - 2nd Sep '07	Soil Association Organic Food Festival Soil Association www.soilassociation.org/festival Bristol, UK
8th - 9th Sep '07	Oxford Symposium on Food and Cookery: Food and Morality Oxford Symposium http://www.oxfordsymposium.org.uk Oxford, UK
13th - 15th Sep '07	Bioethics in the Real World European Association of Centres of Medical Ethics www.ethik.unizh.ch/biomed/eacme/index.html Zurich, Switzerland
13th - 15th Sep '07	Sustainable Food Production and Ethics EurSafe www.eursafe.org Vienna, Austria
17th - 19th Sep '07	Pathways to Legitimacy? The Future of Global and Regional Governance Centre for the Study of Globalisation and Regionalisation, University of Warwick www.csgr.org Warwick, UK
23rd - 24th Oct '07	Healthy Foods European Summit New Hope Natural Media www.healthyfoodssummit.com London, UK
24th - 25th Oct '07	European Nano Food Forum 2007 Epsilon Events www.epsilonevents.com Brussels, Belgium
31st Oct - 1st Nov '07	Sustainability: Creating the Culture Sustainable Development Research Centre www.sustainableresearch.com Inverness, Scotland