Campaign to Protect Rural England
Standing up for your countryside

From field to fork: The value of England's local food webs

Contents

Foreword
by Monty Don

It is a sign of our increasing separation from nature that we are losing sight of where food comes from and how it is produced. The way we buy it adds to this alienation. Food, once at the heart of towns and communities, integral to their rhythm and reason, is often now a side show. It is sold in big boxes on the edge of town. Much of what we buy is highly processed, over-packaged, branded but anonymous, transported from anywhere available at any time. It is hard to remember that these 'food products' come from plants and animals, and are a result of myriad complex interactions of seasons and soil, and from the toil of real people.

An important message of this report, and its companion reports from across England, is that this direction of travel isn't complete. It doesn't have to be a final destination. There still remain networks of producers, store and stall holders established in their communities supplying the best fresh, local and seasonal food. These 'local food webs' keep alive links to the recognisable places and landscapes where food is grown, raised or made. The businesses they support keep towns and nearby countryside diverse and distinctive. They are rooted in place and linked to real, meaningful landscapes.

The 800 retailers and more than 1,700 producers identified in this project show the diversity of these networks and the abundance they offer: from Cheshire apple juices to Sussex fisheries, from Kent hops to Northumberland vegetables, and from Cumbrian lamb to Devon beef. They, and many more such networks and thousands more such businesses, are supplying food in ways which bring people closer to the land through community farms and farmers' markets, school meals and urban food growing, as well as in traditional shops and markets.

But this report is an urgent call for action. In too many places these networks are struggling to survive. The odds are stacked against them. They must compete against the dominance of the big supermarkets, the erosion of town centres with the corresponding loss of diversity of outlets and small-scale producers and the disappearance of food from living streets. These trends continue to change and challenge the way our towns and countryside work and feel and the way our food is produced. They threaten the diversity of the farming system and they force up the scale at which farms can survive and rewrite how the land is managed.

There are many recommendations here of how we can support local food. Government must fully support these food networks in its policies and guidance. Equally local councils must build partnerships with businesses from retailer to producer and their customers to nurture and grow local food webs. But we too, as individuals and as consumers, make important choices which shape the food system where we live. Local food is a powerful way to form our own connections to the land, landscape and nature. It is a chance to enjoy seasonal produce, to discover the best, most wholesome and freshest food around and the most distinctive varieties and tastes. It is our chance to support a food network that is rich with variety and diversity and meaning. It is a chance we need to seize.

Local food is a powerful way to form our own connections to the land, landscape and nature

Summary

This report presents findings and recommendations from a five-year national project – Mapping Local Food Webs – to engage local volunteers across England to research their local food 'webs': the network of links between people who buy, sell, produce and supply food sourced locally.

The project builds a picture of local food webs, their character, benefits, the challenges faced and the impact that these networks have on people, their livelihoods and the character of their town and local countryside.

This report brings together findings from 19 locations to describe local food webs in national terms. We have collated qualitative and quantitative data from interviews in all locations to generate combined statistics and shared themes and issues. The report considers the scale and economic importance of local food webs in terms of jobs supported, turnover of outlets and supply chain businesses, and also their social and environmental importance. We include analysis of the challenging context in which these food webs operate including current policy. We draw conclusions about how policy change and actions can enable local food webs to grow and thrive for the long-term future.

Definition of a local food web and local food

For the project we defined:

- a *local food web* as the network of links between people who buy, sell, produce and supply food in an area. The people, businesses, towns, villages and countryside in the web depend on each other
- *local food* as raw food, or lightly processed food (such as cheese, sausages, pies and baked goods) and its main ingredients, grown or produced within 30 miles of where it was bought. For all locations, outlets were in a core study area of a 2.5-mile radius circle centred on a town or city. Producers based within a 30-mile supply zone beyond this were counted as local.

Main recommendations

These recommendations are for the Government, local authorities, food retail businesses, local communities and individuals. Further recommendations appear across the report.

1 – Government should develop the competition policy framework to better support retail diversity and entry to markets of new local food entrepreneurs by preventing further market concentration which could act as a barrier for small and medium-sized businesses.

2 – Government should develop national planning policy guidance to provide stronger support for a sustainable food system by showing how planning can promote and protect the infrastructure and assets needed to buy, grow, produce and distribute local food.

3 – Government should strengthen the ability of the planning system to ensure the vitality of town centres by enabling local authorities to set conditions on the location, scale and accessibility of retail as well as to

61,000

Estimated number of jobs across England due to local food sales to shoppers

16.3 MILLION

Number of customers English local food outlets could serve each week

£2.7 BILLION

Potential annual sales from independent local food outlets in 750 towns across England

restrict the dominance of particular operators in local market areas.

4 – Government should provide strong leadership on sustainable food procurement by setting challenging long-term targets for food procurement for its Whitehall departments, agencies and other non-departmental public bodies to increase food supplied from sustainable sources.

5 – Local authorities and other public bodies should form partnerships in their areas to develop food strategies and action plans.

6 – Local authorities updating their local plans in the light of the National Planning Policy Framework (NPPF) should develop policies to support local food networks by building on NPPF policies on retail diversity and town individuality, support for markets and protection of fertile land.

7 – Businesses within local food networks should work together to promote awareness, access, affordability and availability of local food by developing a clearly defined 'local' brand, developing shared delivery and distribution services, and considering extended opening hours.

8 – Supermarket chains should set themselves demanding targets for stocking more local food in ways which reinforce trust in local food by stocking fresh, seasonal local produce, clearly defining local food, minimising transport and committing to equitable trading with local food producers.

9 – Community groups should engage in initiatives to shape their local food networks such as food partnerships, neighbourhood planning, food web mapping and community food growing.

10 – Individuals can and should act to change the way our food system works by shopping at a wide variety of outlets, supporting those that stock high levels of seasonal local food and persuading others to do so.

Key findings

Local economies

For the 19 locations surveyed combined our analysis shows that:

- local food sales through independent outlets support total turnover of **£132 million a year**; over half – £68 million – can, we estimate, be attributed directly to local food sales
- local food outlets support **over 2,600 jobs** full-time and part-time of which **over 1,500** can be attributed directly to local food sales
- there are 2,000 supply chain businesses providing locally sourced produce to these locations supporting total turnover of an estimated **£718 million a year** and employment of **34,000 people**.

Nationally, based on extrapolations from data from all locations, we broadly estimate:

- local food sales in some 750 towns across England through independent outlets (including social enterprises and co-operatives) could currently be **£2.7 billion a year**
- these outlets are supporting **over 103,000 jobs** (full-time and part-time), of which **over 61,000** can be attributed directly to local food sales.[1]
- money spent in local food networks will be re-circulated within the local economy for longer: it could be contributing **£6.75 billion of total value to local economies**
- pound for pound, **spending in smaller independent local food outlets supports three times the number of jobs than at national grocery chains**: outlets selling significant to high percentages of local food support on average **one job for every £46,000 of annual turnover**; by comparison at three national chains one job is supported per £138,000 to £144,000 of annual turnover.[2]

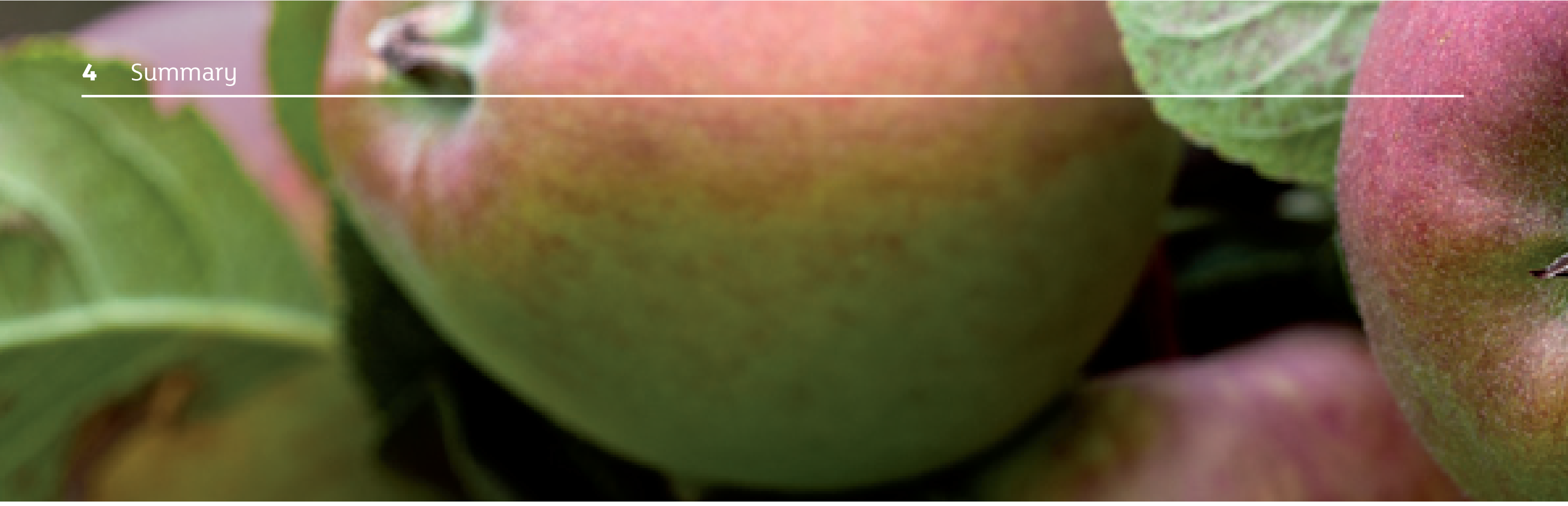
Local food webs have other important economic benefits:

- distinctive, fresh local produce gives outlets a strong selling point
- outlets contribute to the character of market and other towns, drawing visitors and food tourists
- networks of local outlets reduce risk for producers of relying on fewer larger contracts
- they offer markets for smaller producers (**69%** were micro-businesses and **28%** small businesses)
- local food webs are vital seed beds for innovation and new enterprises trialling products.

Local communities

Across the 19 locations surveys showed:

- local food outlets serve **415,000** customer visits weekly; nationally, across England such outlets could serve, we estimate, **16.3 million** customers a week
- national supermarket chains dominate grocery spending (77% of all main shopping trips)
- shoppers gave convenience (44%), proximity/location (36%) and price (24%) as the main reasons they use supermarkets
- despite this dominance of chains, local independent stores and markets matter to shoppers: one fifth of shoppers used independent stores for all or part of their main shopping; they account for 60% of extra or 'top-up' shopping visits
- the main reasons for using smaller independent stores were: quality/freshness/taste (46%), specific products (32%) and local produce (19%)



- shoppers' main reasons for buying local food were: supporting local farmers and producers (56%); quality (54%); supporting the local economy (51%); taste (41%); food miles (34%); value for money (19%); seasonal food (19%).

Local food webs extend choices of where to buy the freshest, high quality food and enable people to shop to support local producers and the local economy, to reduce food miles and to eat seasonally.

Short supply chains also mean closer connections to where food comes from and support an awareness of seasonality and the realities of food production. Benefits also come from outlets selling local food being smaller local shops anchored in their local community: acting as social hubs; offering personal service and often informal support for the elderly and less mobile ; and supporting a wide range of very local good causes through donations, gifts in kind, sponsorship and advertising.

Local environment

- The concept of 'food miles' resonates with shoppers and businesses: 34% of shoppers gave reducing food miles as a main reason to buy local food; numerous food web businesses cited it as an advantage of local food linked to lower transport costs, freshness of produce and less pollution. Local food webs show producers across many locations clustered within 10-15 miles of outlets. Food miles indicate closer connection to food provenance as much as distance travelled.
- The scale of environmental challenges can prevent people believing they can make a difference. The food miles concept helps shoppers to change their habits in a meaningful, intuitive way, and should be built on to convey the wider environmental benefits of local food.

There are other environmental benefits:

- local goes hand in hand with seasonal food and reinforces an understanding of seasonality; it helps people to buy food that needs less energy to produce
- local food needs less packaging than food needing protection during long-distance journeys
- local food supports the viability of independent outlets which keep buildings in use; especially in historic market towns this maintains character, individuality and sensitive scale of use
- local food webs underpin local diversity in the scale and type of farming in the area from livestock to cheese to fruit cropping; they support genetic diversity in traditional and rare breeds, heirloom and heritage varieties not suited to large-scale processing and distribution systems.

The scale and character of local food webs

This national project provides for the first time strong evidence from across England of the scale and attributes of local food webs. It confirms aspects of local food networks that many people instinctively understand. In certain towns – such as Ledbury, Otley, Penrith and Totnes – there are relatively high numbers of outlets selling local produce, a large number of suppliers and good availability. For their size, local food supports a relatively high number of jobs and turnover in and around these towns.

On average across all locations the highest levels of local produce are found at farmers' markets and farm shops as expected, but also at butchers. They are closely followed by bakeries,

34%

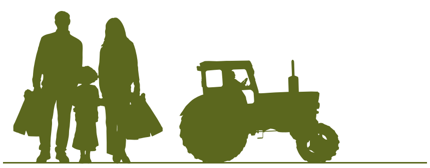
Percentage of shoppers seeing cutting food miles as a key reason to buy local

£6.75 BILLION

Estimated total value of local food spending re-circulating in the local economy

£718 MILLION

Estimated annual turnover of local food suppliers we researched



Local food webs capture the interactions between those who produce and buy food from farmer to shopper

general grocers and fishmongers with high levels (50-75%), and delicatessens, greengrocers and street market stalls with significant levels (above 25%). These traditional stores, some in markets, are vital to thriving food webs. Excellent farm shops and farmers' markets can help increase access where such stores are few but generally where traditional local shops have disappeared there are smaller networks of local producers and less varied local produce available. National supermarket and some regional chains were present in all locations. In the main, research shows they do not stock a high percentage of local food – from 0-4% at most by turnover – but with a few notable exceptions.

Wider context

Local food webs capture the interactions between those who produce and buy food from farmer to shopper. They link the retail system to the farmed land.

Retail and town centres

Supermarkets have risen to dominate food retail and their growth has seen massive decline in smaller shops, especially traditional specialist stores – down from 120,000 (1950s) to 18,000 (late 2000s). Many such as butchers and greengrocers sold high proportions of local produce supplied through local wholesalers and direct to store. Their replacement by supermarkets with (inter)national supply chains has **'de-localised'** our food shopping.

Expansion of market share by chains has been fed primarily by out-of-town development of superstores and hypermarkets and this growth is set to continue despite recession: 44 million square feet of new supermarkets with just 20% in town centres are planned or have permission. Internet sales and collapse of high street chains have accelerated town centre decline. Further store closures are forecast.

Farming context

Farming, often undervalued, supports the food chain, a major employer and part of manufacturing and service industries. But the sector faces major challenges. These include population growth, demand shift, climate change and resource depletion. Farming must produce more with fewer resources. The food chain from farming to domestic consumption has major impacts on greenhouse gas emissions in production, transport and the home. Food has major implications for energy use, water use and waste, and depletion of soils. The costs of many such impacts are not reflected in the price of food. There are other significant farming trends: an increase in farm size and drop in farm numbers coupled with rising imports in recent decades. Fruit is one example of how market forces shaped by price and supermarket power have undermined domestic production.

Land-use planning

Land-use planning through national planning policy has a major role to play in shaping retail development, the nature of town centres and retail diversity. Policy since 1996 has sought to focus development on town centres to keep them vibrant. Despite supportive policy supermarket expansion out of town and into superstores has undermined centres, weakened diversity and concentrated ownership with fewer, larger companies. These trends affect the markets for producers. Loss of retailers has narrowed their options. Supermarkets are able, through buyer power, to drive down prices, forcing producers to scale up. The Groceries Chain Adjudicator should enable better enforcement of equitable supply chain relationships. But with the NPPF failing to strengthen town centre planning policy, 'business as usual' seems likely.

Conclusion

Local food networks can address the range of challenges set out here in three important ways:

- by contributing to the strength of smaller outlets, maintaining the attraction of town centres through local food and contributing towards their diversity, character and the community
- by providing channels to market for new and micro, small and medium-sized businesses, supporting producer businesses and enabling farming to remain diverse and varied in production and outputs including values supported by consumers such as freshness, provenance and seasonality
- by encouraging engagement of consumers with food and, through the human scale and connection within local food networks, enabling shoppers to understand the realities, challenges and impacts of food production and to choose to make a difference individually and collectively.

There is an urgent need for national and local government to act to put in place the strong policy framework needed to protect retail diversity and through it local food webs. Businesses, the community and we as individuals all have a role to play in supporting their future health.

Introduction

Food is an essential part of our lives. It has been central to the nature of our towns and countryside since the beginnings of civilisation.[3]

Farming has shaped England's countryside over millennia: the food it produces and the landscapes it maintains are invaluable assets. Yet the wider role of food is being forgotten. A multitude of factors has changed the way we buy, and experience, our food. The weekly supermarket shop has displaced food from market places and town centres. The scaling up of our stores into retail sheds has increased standardisation of food. National and global sourcing and increased distribution distances mean food has to be packaged for transit and for a long shelf-life.

This system has disconnected us from our food's origins. Plants and animals disappear into large sheds too. The 'denaturing' of food has added to our nature deficit – our decreasing contact with nature – at a time when climate change and resource depletion pose huge challenges. Farming faces numerous challenges in an increasingly volatile future. At the same time, recession and austerity bite and our high streets are in crisis.

These issues raise questions about the sustainability of our food system. While some suggest that global economic and resource pressures make intensive large-scale production systems inevitable, our analysis of local food webs suggests a different set of priorities for the future. Local food systems underpin the viability of farming, support the economy of rural areas and towns, innovate and create jobs, build community and connections, and enhance the countryside. The businesses in these networks are most often small and dispersed. Individually they are below the radar. But as Carolyn Steel puts it: 'Food is all about networks; things that when connected add up to more than the sum of their parts.'[4]

The overarching aim of this report is to make local food webs more visible and better understood – to put them literally on the map – and make clear their ability collectively to make a difference. In so doing, we argue that local food networks need sustained support from individuals, the community, business and policy-makers locally and nationally. This report begins with a summary of the research and a discussion of the challenges of defining local food. The first main section reviews the wider context, considering national trends in retail, pressures on agriculture, and recent developments in planning policy, particularly for town centres.

The second main section builds on the project findings to characterise local food webs, the types of food available, and business models.

The third main section brings together findings from 19 locations to form a national picture. These findings are divided broadly into economic, social, and environmental themes, followed by analysis of local policies. They combine statistical and qualitative analysis from shoppers and businesses to identify the benefits of local food webs and the challenges they face. We set out recommendations on how local food webs can be better supported and a conclusion.

Throughout the report we include case studies which illustrate some of the attributes and benefits we explore or offer solutions and ideas for action.

30 MILES

The radius around a location defined as the local supply area

1,873

Number of shoppers we interviewed

804

The businesses we screened for sales of local food across 19 locations

About the research

Background

The concept of a local food web stems from the work of Caroline Cranbrook.

In 1998 Caroline grew concerned about the impact of a proposed superstore on her local market town of Saxmundham in east Suffolk. She produced research to show the importance of the local food network. This research suggested local food networks with similar benefits existed elsewhere, but further evidence was needed.

Aims of the national project

The national Mapping Local Food Webs project engaged people in researching their own local food web in up to three towns and cities in each of the eight English regions. The project was developed with support from Sustain and received funding for 2007 to 2012 from the Big Lottery Fund through the Making Local Food Work programme. The project aimed to:

- increase the local community's understanding of the size and importance of their local food web and its impact on local people's lives, livelihoods, places and the countryside
- explore the relationships between what people buy and eat and the character of their town and the surrounding countryside
- build support for greater local food production and better supply in local outlets
- strengthen and secure local food webs across the country through local and national action and policy change.

Overview of project activities

The project explored 19 locations from 2009. These included markets towns such as Totnes, Ledbury and Penrith and larger urban areas including Hastings, Darlington, Norwich and Sheffield. Individual mapping locations were selected on population size (below 10,000, 10,000–30,000, over 30,000), to achieve broad coverage of the relevant region and where there was good support from local community groups. In each location a core study area was defined by a 2.5-mile radius circle, usually centred on the town or urban area. Beyond that, a 30-mile radius circle was defined as the local supply area.

The project employed regional co-ordinators to recruit and support local volunteers to research shoppers' attitudes to local food, identify and interview outlets selling locally sourced food in the core study area, and interview a sample of their suppliers. Co-ordinators carried out survey work alongside volunteers. Open public meetings and workshops were held to involve and consult local residents and businesses, to raise awareness of issues, to gather information on barriers and opportunities, and in several locations to verify findings and explore actions to support local food. Report writers and volunteers researched case studies primarily through interviews with local food web businesses and other stakeholders such as local councillors, town centre and market managers and local chambers of commerce.

Data was entered and collated at CPRE National Office and analysed statistically and thematically to provide findings for each location report and then to generate findings reported here. Case studies from location reports are replicated here where relevant and are based on interviews with businesses – supplemented by desk-based research – and with other stakeholders including volunteers, food activists, town and market managers and planners.

For detail of the mapping research process for individual locations see Field to Fork location reports.

Shopper surveys, business interviews and public meetings

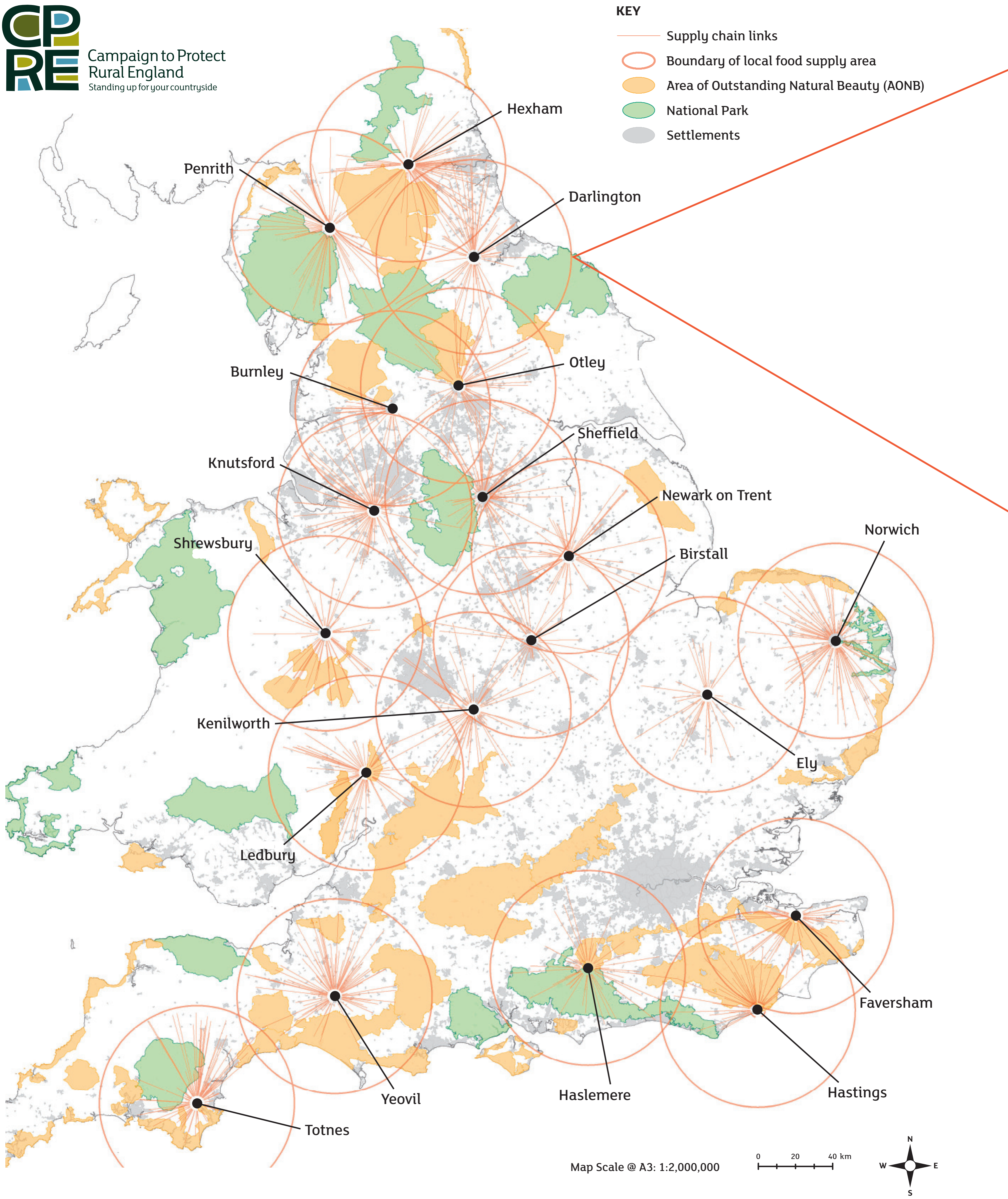
Engaging the local community

Numbers of local volunteers involved: **262**
Numbers of shoppers interviewed: **1,873**
Number of public meetings held (launch meetings/workshops): **52**
Number of people attending and contributing views: **1,735**

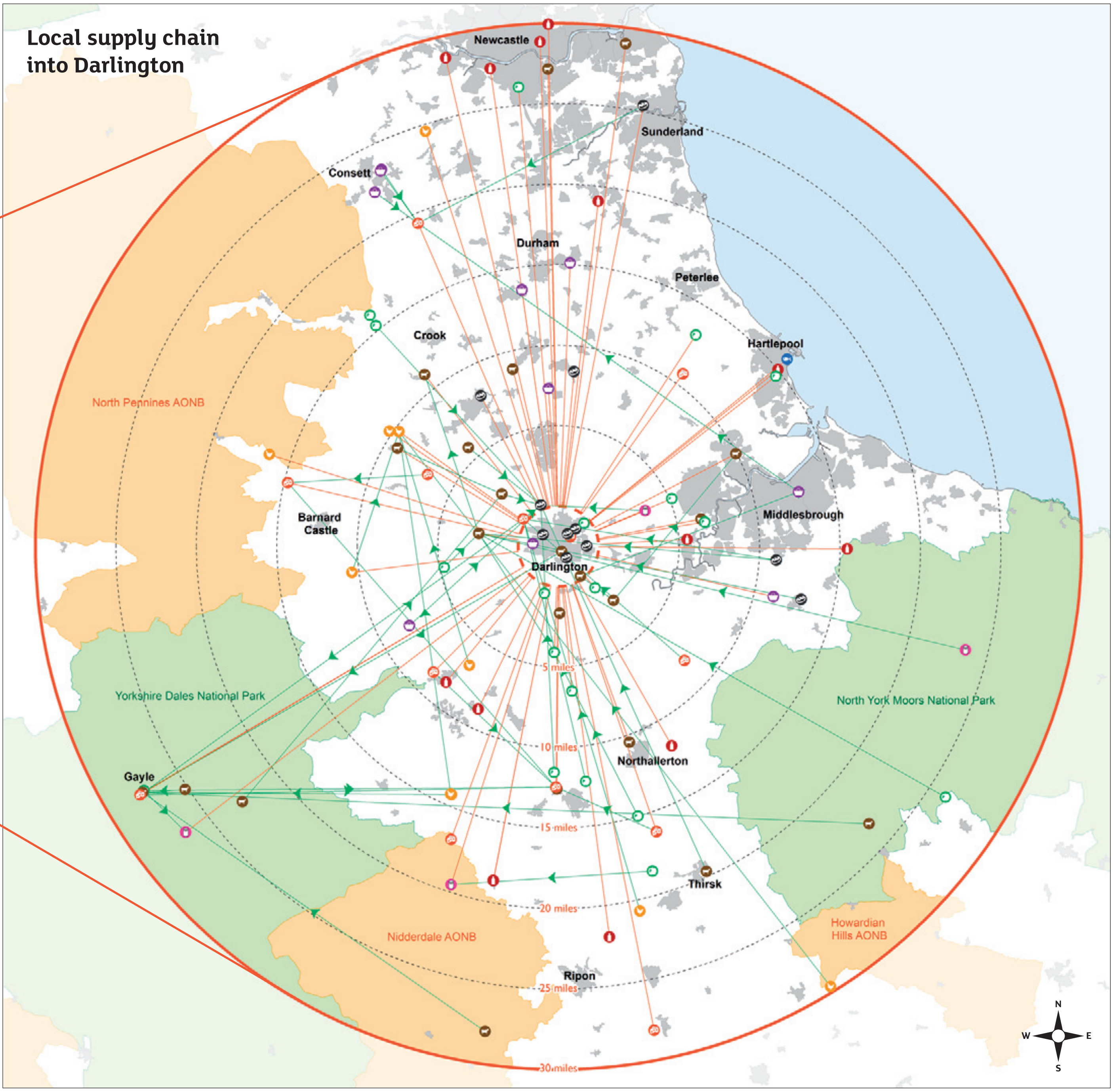
Talking to businesses

Number of businesses screened in 19 locations (for sales of local food): **804**
Number of outlets interviewed: **403**
Number of supply chain businesses interviewed: **219**
Number of case study interviews: **102**

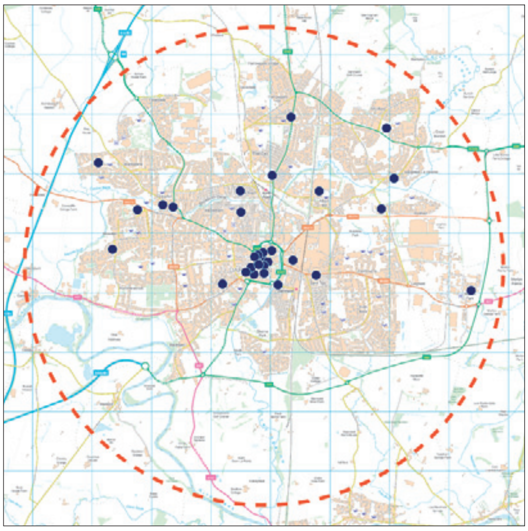
Map of locations surveyed and supply chain links identified



Local supply chain into Darlington



Core study area and location of main local food outlets in Darlington



KEY

- Meat/processed meat
- Fruit/vegetables
- Dairy
- Cereals
- Eggs
- Fish/shellfish
- Drinks
- Preserves
- Baked goods
- Other
- Supply chain link
- Multistage supply chain link
- Boundary of core study area
- Boundary of local food supply area
- Area of Outstanding Natural Beauty (AONB)
- National Park
- Settlements

Defining local food

The term 'local' is deceptively simple. It is used widely and loosely but in many ways which defy definition.

Take the example of the local shop: surely a shop close to home. But how close is close, and how distant is not local? Setting a boundary is more difficult than it seems and depends on context: a rural *local* shop may be in the next village several miles away; in town it might be at the end of the street. Local can also be set against much larger geographical areas – regional, national or global.

Local can also mean different things to different people, and is used in different ways depending on the purpose. In terms of food, there has been a rapid growth of interest in local in recent years. Farmers' markets, community-supported agriculture, vegetable box schemes and local food festivals have mushroomed across the country. These support a natural and simple association of local food and proximity – geographical closeness – and are represented by businesses and initiatives rooted in the area. However, supermarkets, operating nationally and internationally, now reserve shelf space to sell popular local or regional foods; in some cases a region or country can be described as a 'local' source.[6] Where the boundaries lie between a local area and the next scale up is open to debate, and ultimately depends on the context and the uses to which any definition is put.[7] Research for the Food Standards Agency (FSA) found that consumers also interpret the term differently with 40% of respondents seeing it as within a 10-mile radius, 20% within the same county, 20% from a number of neighbouring counties and 20% from a region.[8]

Defining 'local food'

There is no legal definition of local food in use, except reference in a relatively obscure EU regulation on food hygiene for animal products.[9] The Policy Commission on the Future of Farming and Food, set up by the UK Government in 2002 to advise on a sustainable future for the food and farming sectors in England, stated in its 2002 report that 'once local food becomes more established, DEFRA, the Food Standards Agency and FFB [Food from Britain] will need to devise an enforceable definition of "local" [as] a necessary first step for the full benefits of local branding to be realised.'[10] However, FSA research showing that consumers have differing views on the meaning of 'local food' led them to conclude that it would not be possible to provide a definition for regulatory purposes.[11]

There are further barriers to establishing a tight definition of local food, particularly for legal or certification use. Food production systems 'can consist of complex networks of relations stretched over a variety of spatial scales': even for simple commodities many of the resources required to produce them – seeds, fertiliser, pesticides, machinery – are likely to be produced in many different places.[12] While few would claim that all such inputs need to or could be locally produced, the importance of the issue is clear when Brazilian soybeans – a driver of Amazonian deforestation – may be used to fatten chicken, pork or beef sold as 'local' in the UK. This complexity is compounded by distribution systems which, for economic and logistical reasons, require food produced in one area to be processed and packaged elsewhere – sometimes exported to do so – then transported to regional distribution centres before being delivered to the store where it is sold. This means food produced within a few miles of a store may have travelled hundreds of miles to get there.

Different modes of defining 'local food'

Local food has nevertheless been defined in a number of ways which are relevant to our project. Kneafsey et al. define three overlapping modes to which a fourth (d) is added below.[13]

(a) Local food defined according to product, process and place attributes

This definition attributes particular foods to a district or geographical area, based on special attributes such as soils, topography, climate, local skills and knowledge. The best-known example is the French Appellation d'Origine Contrôlée system, now extended across the EU via the Protected Designation of Origin (PDO) and Protected Geographic Indication (PGI) systems. UK products covered include Melton Mowbray pork pies, Yorkshire Triangle rhubarb and West Country Farmhouse Cheddar.[14] The regulations are legally binding, which protects small producers from imitation and consumers from deceptive claims. These products do not have to be sold locally, which shifts the definition away from point of sale.

(b) Local food produced, processed and retailed within a defined radius
Definitions based on distance (usually within 30 miles) or geographical area (such as a county) have an appealing simplicity. In England CPRE has promoted a definition of local food as food produced, grown and processed within 30 miles of the store. This distance has also been adopted by a number of large retail chains including Waitrose, Asda, Booths and The Cooperative. Tesco uses a county or neighbouring county definition. The National Farmers Retail and Markets Association (FARMA) has developed this definition into a set of certification criteria for farmers' markets to protect their integrity. It uses 30 miles as the ideal radius, but this can be stretched to 50 miles for larger cities, or coastal or remote regions, with 100 miles as the maximum recommended. FARMA also recognises distinct geographical areas such as counties and National Parks.

(c) Local food that delivers certain benefits
Sustain and The Soil Association have developed definitions based on criteria related to food's social, environmental and economic benefits. For The Soil Association, a sustainable local food economy is 'A system of producing, processing and trading, primarily of sustainable and organic forms of food production, where the physical and economic activity is largely contained and controlled within the locality or region where it was produced, which delivers health, economic, environmental and social benefits to the communities in those areas.'[15] Sustain's definition incorporates similar criteria such as proximity, fair or co-operative trade, and being environmentally beneficial or benign.[16] Research in the US for Congress also suggests the category of 'local' based on attributes 'mostly based on consumer perceptions of certain desired social or supply-chain characteristics in producing "local" foods, such as production by a small family farm, urban farm or garden, or farm using sustainable agricultural practices'.[17] These factors link to many others which influence demand for local food, such as quality and freshness, traceability, supporting the local economy and environmental impacts.

Sourced within 30 miles – definition of local food used by Asda, Booths, CPRE, East of England Co-op, FARMA and Waitrose

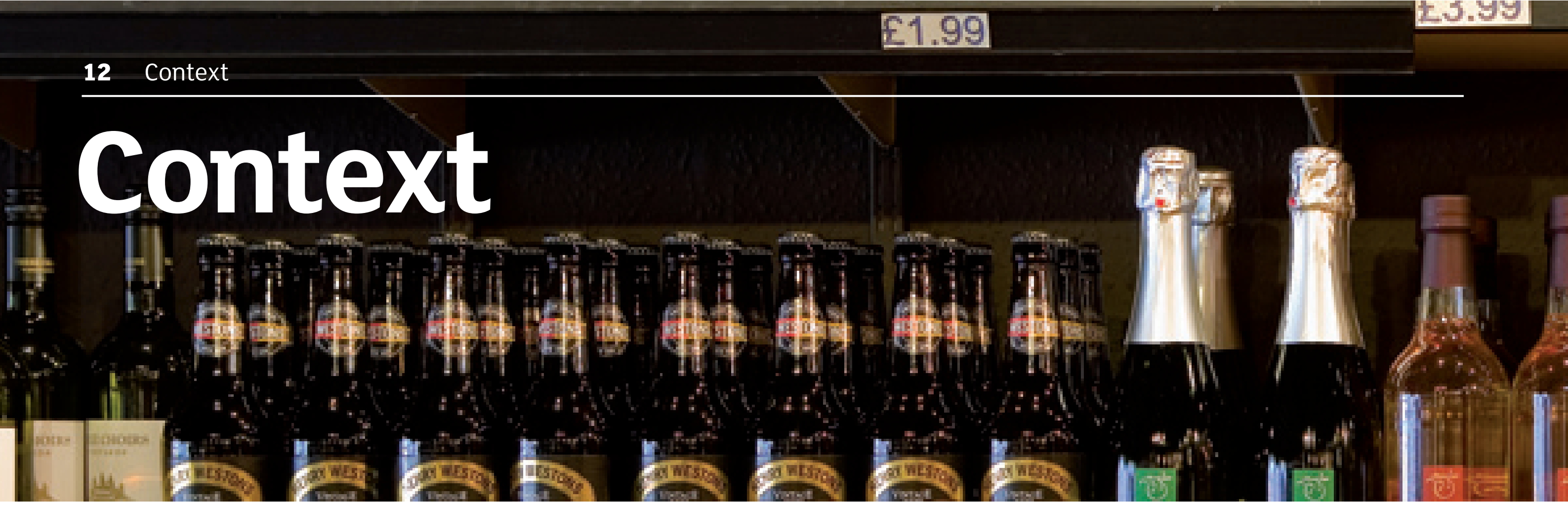
(d) Local based on type of outlet
The US Congress research above goes on to suggest a further definition based on type of outlet. This is where 'local' refers to the 'types of marketing channels used by farmers to distribute food from the farm to the consumer'. This lists 'direct-to-consumer outlets' such as road-side stands, on-farm stores (farm shops), farmers' markets and community-supported agriculture (CSA), and 'intermediated outlets', such as grocers, restaurants and regional distributors.[18]

Defining 'local food webs' in the project
While the definition of local food remains unresolved, this project needed a working definition for survey work to proceed. The academic review which underpinned our research described local food webs as 'networks of relationships between food producers, processors, retailers and consumers which deliver economic, social and environmental benefits within a defined geographical radius'.[19] This combines concepts b) and c) above. It also recommended defining the scale of a retail study area and local area for food supply. This conceptual understanding supports the final definitions used in the project. To ensure the research remained practical for volunteers as well as enabling CPRE to quantify and compare the importance of food webs in different areas, the standard definitions below were used across all locations.

Project definitions
Our research was based on:
- a *core study area* for researching food outlets, based within a 2.5-mile radius circle from the centre of the location
- a *local supply area*, covering a 30-mile radius circle beyond this.

A *local food web* is the network of links between people who buy, sell, produce and supply food in an area. The people, businesses, towns, villages and countryside in the web depend on each other, and this interdependence benefits livelihoods, quality of life and the quality of places.

This project defined *local food* as raw food, or lightly processed food (such as cheese, sausages, pies and baked goods) and its main ingredients, grown or produced within 30 miles of where it was bought.[20]



Context

Local food webs are about connections: the interactions between those who buy, sell and produce food, and the relationship between where food is produced and where it's consumed.

The concept goes beyond that of a supply chain to look at the retail system, and food's wider impact on the quality of places, the environment and community life in both urban and rural areas. Because of the breadth of the idea, many factors in the wider national and international context are relevant to local food webs.

Retail and town centres

The 'death of the high street'
The state of the nation's high streets is the subject of much media coverage and an area of great concern. The 2000s saw the economy buoyed by a retail and house-price boom – and rising debt. With the 2008 crash, growth turned to recession. Other trends affecting how, where and when we shop are well analysed in the Portas Review. Portas recognises that the nation's high streets are changing in multiple ways.[21]

The growth of out-of-town shopping
A key trend over the past three decades has been the development of 'supersize' regional shopping centres, often heralded as drivers of regeneration and retail growth. These may be out-of-town centres (Lakeside in Essex, Bluewater in Kent), or developed within urban areas (such as London's newest Westfield shopping centres at White City and Stratford). Both represent a challenge to existing town centres and high streets. These are complemented in many towns and cities by the move to out-of-centre stores and retail parks, which have enabled retailers to expand massively from relatively constrained town centre sites into superstores. In the vanguard of this trend have been the grocery chains: the Competition Commission found that 'the number of larger stores [over 2,320m^2] located out-of-town increased from just under 300 in 1980 to more than 700 by 1990 and to almost 1,500 in 2007'.[22]

The net effect has been to move shopping out of towns to their margins or elsewhere, as well as to increase car-based shopping. This scaling up by national chains with access to high levels of capital leaves smaller independent stores – which proportionately sell much higher levels of local food – losing trade, as town centres where they operate struggle to compete.

The expansion of the supermarkets
Supermarkets have expanded in other respects. Firstly, the number of stores operated by the national grocery chains has continued to grow rapidly across all scales – convenience stores, supermarkets, superstores and hypermarkets. BBC research for *Panorama* in 2010 gave an overview of the expansion of supermarket stores of the 'big four' (Tesco, Asda, Sainsbury's, Morrisons) from 2004 to 2010, shown below.[23] In 2012, the multiples (excluding co-ops, discount groups and independents) operated some 8,400 stores, including over 5,400 supermarkets (over 3,000 square feet).[24]

Further research by commercial property adviser CBRE reported in late 2011 that this expansion is set to continue well into the future with:

- almost 4 million square feet of new grocery retail space under construction
- planning permission already given to national chains for another 21.4 million square feet
- applications submitted for a further 19 million square feet
- more than 80% of new space in out-of-town developments.

This 44 million square feet (4.01 million m^2) of projected development is equivalent to 1,635 new superstores (at 2,500m^2).[25]

Secondly, the market share of the multiples has escalated. Competition Commission statistics show the market share of 'large or regional grocery retailers' expanding from 20% in 1950 (estimated) to 44% by 1971 to 85% by 2007.[26] Most recent 2012 figures indicate supermarket chains account

Table A: Number of supermarket stores

Location (by postcode)	2004	2010
Birmingham	19	104
Bristol	19	76
Cleveland	7	59
Nottingham	12	82
Sheffield	16	104

for 97-98% of grocery sales, with the 'big four' around 75-76%.[27]

Thirdly, buildings have become physically much larger. Between 2006 and 2010, Tesco increased the number of its Extra hypermarkets (above 60,000 sq ft) by 50%, from 118 to 177.[28] Huge superstores have appeared not only in large urban centres but attached to small market towns, where they can dwarf the existing retail offer. For example, Hexham, Northumberland (population 11,000), has a Tesco Extra store which accounts for 45% of all main shopping trips in the Tynedale district. Kingsbridge, Devon (pop. 6,000) has recently acquired a 3,700m^2 superstore and Blandford Forum in Dorset (population 9,000) awaits a 4,066m^2 superstore development.[29]

Fourthly, the grocery multiples have expanded from convenience (everyday) goods into comparison goods – items such as homeware, stationery, flowers, books, electricals, pharmacy products and clothes as well as fuel. It is well known that Tesco takes £1 in every £8 of total retail spend in the UK but Sainsbury's is now the seventh largest clothing retailer by volume.[30] Shoppers may be left with little reason to visit the town centre, threatening a whole range of outlets. As the centre declines, smaller shops find it increasingly hard to compete and traders disappear, leaving less choice, not more.

The decline of town centres

The recent recession has led to widespread failure of high street businesses, including household names such as Woolworths, Barratts, Focus DIY, Comet, Peacocks, Habitat and Clinton Cards. Town centre vacancy rates average 14% nationally, though they vary considerably. As well as the effects of the recession, other trends behind this include the growth of out-of-town stores mentioned above and of e-commerce. The decline in spending on the high street as a percentage of total retail spending illustrates the long-term nature of the problem: from 49.4% in 2000 to 42.5% in 2011, to a projected 39.8% by 2014.[31] Conversely, though not seen as a sign of resilience, new outlets have been opening: noticeably convenience food stores, supermarkets, charity shops, pawnbrokers, pound shops, credit unions and shoe shops.[32] The overall impact of this decline is fewer shoppers, spending less. Town centres lose their attractiveness to high-spending shoppers, leaving those who are less mobile or cannot afford to travel to cope with a declining centre. Their shopping choices are limited further.

Recent research by Deloitte suggests further significant reductions – 'by as much as 30-40% are foreseeable over the next 3-5 years' – in the portfolios of stores held by retailers, a rate of loss likely to seriously damage already fragile town centres.[33]

Fundamental changes to the way we shop

There has also been a marked shift to online shopping, or e-commerce, which is likely to continue to grow rapidly: internet sales of all goods have doubled since 2000 from 5.1% to 10.2% – and even this may be an underestimate, according to the Local Data Company.[34] They anticipate internet sales could reach 12.2% by 2014 and 20% by 2020. Shopping on mobile devices (m-commerce) is another emerging trend: BIS data indicates a growth of over 500% in the past two years.[35]

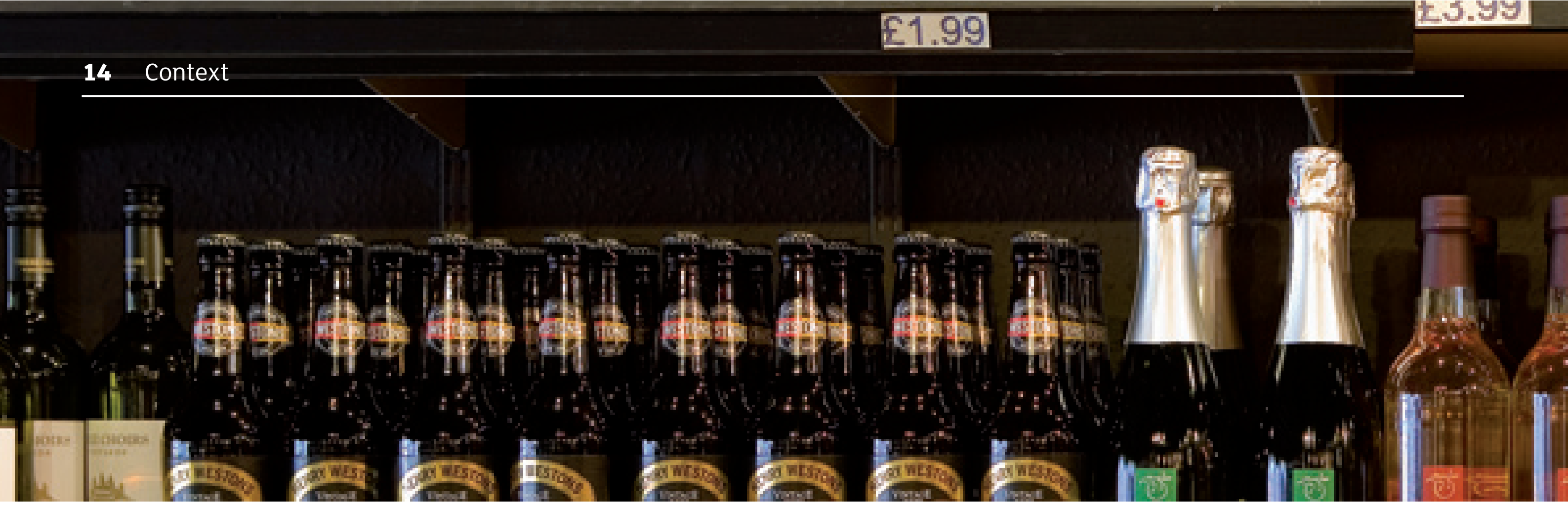
None of this analysis considers food retail as a discrete category, but there are clear implications. Virtual sales reduce real footfall in town centres and local high streets.[36] The loss of trade can bring a vicious cycle: stores close down, leading to still lower footfall, leading to further store closures. Fewer shops and shoppers in town centres may weaken traditional specialist food stores – butchers, greengrocers, fishmongers and markets, many of which are key outlets in local food webs.

The trend to e-commerce in food is most obviously seen in the move to online ordering for home delivery by the likes of Ocado, Waitrose, Tesco and Sainsbury's. Potentially more positive for local food is the growth of weekly box schemes. There are many smaller such schemes but the major market share belongs to Abel & Cole and Riverford. Riverford currently delivers around 40,000 boxes of organic fruit and veg a week in the UK from regional farms. Riverford advertises that it does not air freight and has a strong emphasis on seasonal and local, though how much would meet our project definition (sourced within 30 miles) is not clear.[37]

Other changes

Related – directly and indirectly – to these significant changes in town centre retail are other trends. Recent decades have seen steep declines in:

- traditional specialist shops – smaller stores have been disappearing since before the meteoric rise of supermarkets, but there seems little doubt that competition from chains has weakened and subsequently caused the closure of thousands of independent shops, including butchers, greengrocers, bakeries, off-licences and fishmongers, permanently changing the character of many if not most towns
- pubs, which were closing at a rate of 40 a week in 2009 and 25 a week in 2010[38]
- bank branches and post offices – over 2,300 rural post offices closed between 1999 and 2009



- village stores, with an estimated 400 closing a year[39]
- traditional farm and food distribution infrastructure, including abattoirs, livestock auctions and wholesalers.[40]

Scale of the food sector[41]

The importance of agriculture to the national economy is often undervalued. Around 2% of the UK workforce – some 185,000 people – work in primary production: growing crops, raising livestock and harvesting the land and sea. They supply around 60% of our national food requirement, and contribute 7% of the £412 billion turnover of the food supply chain – almost £30 billion annually.[42]

Farming underpins the food supply chain, which employs more than 3.5 million people and generates £87.4 billion in Gross Value Added (GVA). Food manufacturing and processing account for 370,000 jobs and £78 billion in turnover; it is questionable how much of this would take place without home-produced ingredients. Similarly, the success of many shops and restaurants, from the humble fish-and-chip shop to triple-starred Michelin restaurants, depends on the freshness and quality of British produce.

In total, the food supply chain – from production through processing to the retail and hospitality sectors – accounts for 10% of UK GVA, making it the fifth largest contributor to GVA. At a time when the Government is seeking to rebalance the economy away from financial services, farming and the food industry can play an important role, particularly by reducing imports and potentially exporting, in redressing the imbalance in the UK's external trade.

Global food and farming issues

The plentiful supply of food in our shops discourages us from thinking too long about the forces which shape the food system and the wider impact our food choices may have. But our food supply – and our local food webs – do not operate in a vacuum. They depend upon regional, national and global forces, from trade, finance and policy systems to resource and environmental issues.

Global issues – The Foresight report[43]

In 2011 the Government published the Foresight report on *The Future of Food and Farming* which draws on advice from a lead expert group, several hundred researchers as well as over 100 peer-reviewed evidence papers. The report sets out six important drivers of change which 'will converge in the food system over the next 40 years' to create 'the perfect storm':

- **Global population growth** from the current seven billion to eight billion by 2030 then a likely nine billion or more by 2050; this will occur particularly in Africa and will be marked by movement from rural to urban areas.
- **Increased demand per person** linked to rising incomes, particularly for meat and fish in emerging major economies such as Brazil and China; this will increase pressure on land, water and other resources, raising serious questions about the sustainability of food production.
- **The way the food system is managed at national and international levels:** issues include the globalisation of markets; the emergence of new food superpowers in BRIC nations (Brazil, Russia, India, China); consolidation of retail, food processing and agribusiness into few very large transnational corporations; the role of subsidies and market interventions; the ability of political and institutional frameworks to enable collective responses to the many challenges the global food system faces.
- **Climate change** will alter patterns of rainfall, affect crop growth and the way ecosystems function and mean more extreme weather events, causing production and price volatility; this presents 'the challenge of feeding a larger global population ... while delivering a steep reduction in greenhouse gas emissions'.
- **Competition for key resources** related to food production: pressures on land for food production (soil erosion and degradation,[44] salinisation, desertification, use for biofuels, loss to development); increased global energy demand leading to increased prices and price volatility, with knock-on effects on energy-intensive fertilisers and fishing costs; rapidly increasing global water demand even as aquifers become depleted.
- **Changes in consumers' values and ethics,** which will influence policy and consumption patterns on issues such as national food sovereignty, technologies (GM, nanotechnology, cloning), environmental sustainability and biodiversity, and fair trade and social concerns.

The food system and environmental issues

This section sets out environmental and socio-economic challenges the UK food and farming system faces.

Greenhouse gas (GHG) emissions

Food production, distribution and consumption contribute significant GHG emissions globally and nationally. Energy, mainly produced from burning fossil fuels, is needed at every stage of the food system: to drive farm machinery; to produce inorganic fertilisers such as nitrates; in food

400
Estimated number of village stores that close each year

70%
Amount of land area in England that is farmed

manufacturing, packing, transport and retail, particularly for refrigeration; in catering; for cold storage and cooking in the home. Further sources of emissions include methane from livestock, manure and food waste in landfill, and loss of stored carbon through cultivation and degradation and from cultivating wetlands. Meat and dairy account for around 8% of UK food consumption-related GHGs.

Globally, agriculture causes an estimated 10%-12% of GHG emissions[45] – more if the effects of land-use change such as deforestation are considered. In the EU, the figure is around 9% for agriculture (2005 data), but nearer 31% for the whole supply chain from field to fork.[46] Food generates around 18% of total UK GHG emissions, and 30% if emissions from land-use change abroad to supply UK food consumption are included.[47]

Biodiversity and landscape
In the UK the quality of the natural environment and farming are intimately connected. Some 70% of the land area in England is farmed,[48] and much of the landscape is semi-natural, shaped by agriculture over millennia. The post-war modernisation of agriculture has increased productivity, but at a heavy cost to the environment. From 1947 to 1990, over 335,000km of hedgerows were lost, with 100,000km alone from 1984 to 1990.[49] Semi-natural grasslands have suffered huge loss through conversion to arable since the 1940s, with 90% of wildflower-rich meadows lost.[50] Much of what remains is now protected in Sites of Special Scientific Interest (SSSIs) and Special Areas of Conservation, but only 26 of 710 areas/SSSIs on enclosed farmland are in 'favourable condition'. Pond numbers and quality have declined, especially in arable areas.[51]

The loss of these and other habitats is linked to major declines in diversity in plants, terrestrial invertebrates and vertebrates. At the end of the 20th century, some 333 farmland species (broadleaved plants, butterflies, bumblebees, birds and mammals) were declining due to agricultural practices. Numbers of farmland birds fell by 40% between 1970 and 2000, and a further 4% since. The number of bee colonies in England has declined by 54% since 1985.[52]

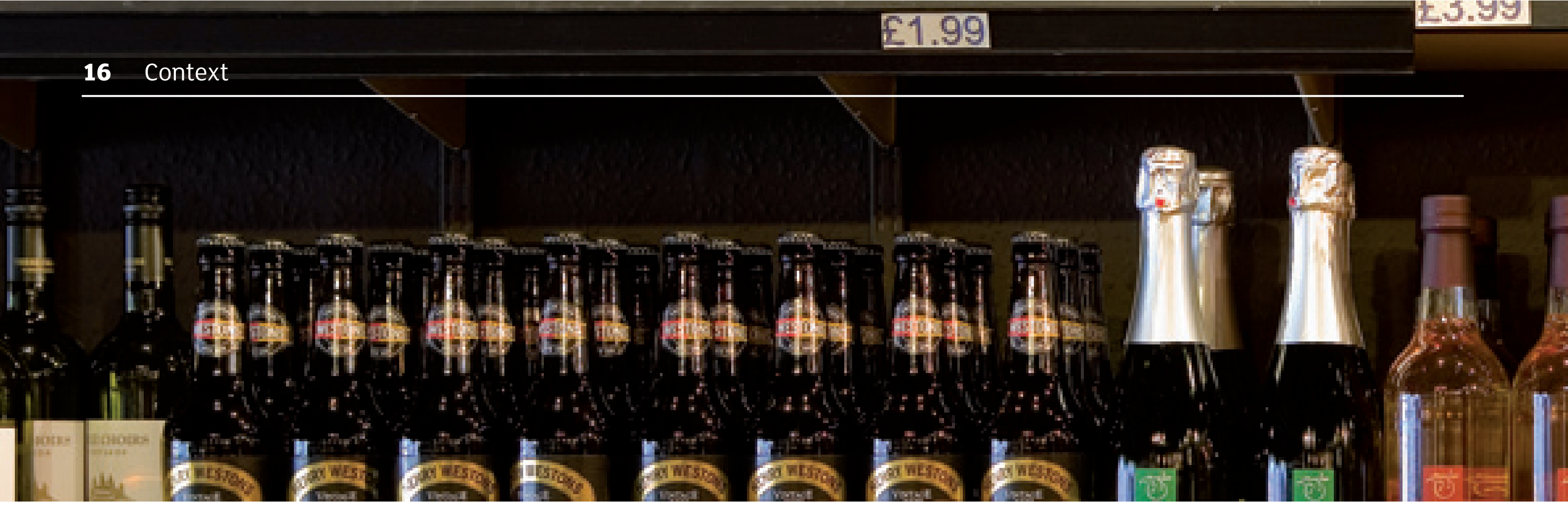
Transport
The transport of food is the single largest energy user in the food system and accounts for around 3.5% of the UK's total GHG emissions.[53] There are also additional impacts such as damage to roads and verges from heavy goods vehicles (HGVs), noise and air pollution as well as congestion. Main UK GHG emissions related to food transport are UK HGVs (29%), consumer cars (23%), sea transport (15%), air transport (12%) and overseas HGVs (12%).[54] A quarter of UK HGV movements relate to food transport.[55] Air freight contributes disproportionately to total transport GHG emissions: only 1.5% of fruit and vegetables are transported by air, but they make up 40% of all fruit and vegetable transport emissions. Between 1992 and 2010, food air miles increased by 262%, although they have recently stabilised; customer car travel increased by 31% and urban kilometres – a measure of congestion – by 26%. Main reasons are people are driving further to shop owing to the rise of out-of-town grocery stores, increased demand for overseas goods and more transport between businesses as more processing and packaging of food takes place.[56]

Refrigeration
Refrigeration makes up around 15% of total food chain emissions in the UK, or 3-3.5% of the UK's total GHG emissions.[57] Supermarkets tend to be more energy intensive than other food shops.[58] Unlike greengrocers, supermarkets often put fruit and vegetables in refrigerated cabinets. They also tend to have longer opening hours (in some cases 24 hours a day).

Waste
An estimated 20 million tonnes of CO_2 is associated with avoidable food and drink waste in the UK each year.[59] Waste occurs at every stage of the food supply chain – agriculture, food manufacturing and packaging, distribution, retail, storage at home and during preparation for consumption. There are opportunities to significantly reduce waste at every stage.

Water
The UK's water footprint – the total amount of freshwater used to produce all the goods and services in the country – is 102 billion cubic metres per year, equivalent to 4,645 litres per person per day. Agriculture accounts for around three-quarters of this – but 62% of the water we use is imported 'virtual' water, making the UK the world's sixth largest net importer of virtual water. Oil crops, cotton, livestock, and coffee, tea and cocoa take up the largest share of the UK's external water footprint.[60]

UK food consumption has a considerable impact on the water footprints of other countries. Spain contributes 3% of the UK's total agricultural water footprint through exporting water-intensive products such as salad crops, olives, grapes, oranges, rice and certain meat products. Some of these are produced in water-stressed regions like Almeria, where



rising demand has led to water deficit in aquifers and salinisation. Imported tomatoes, which account for broadly 80% of consumption, need around four times more water than UK-produced ones.[61, 62]

Soil erosion and degradation

Soil erosion is a major international concern. Productivity of land in some areas has declined by 50% due to soil erosion and desertification at a time when food production needs to increase to feed a growing global population. Globally, 75 billion tonnes of soil are lost each year at a cost of roughly US$400 billion per year.[63] In the UK, an estimated 11.64% of land is degraded; in France it's 13.89% and in China 30.55%. Since around 40% of our food is imported, our food security is woven with the fate of land in other countries. For example, the two largest exporters of fruit and nuts to the UK are Spain, where 21.8% of land is degraded, and South Africa, with 36.91%.[64]

Land

From 1998 to 2008 over 38,000 ha of agricultural land was lost to development, more than half of it to housing and around a quarter to transport/utilities.[65] Successful policies on redeveloping brownfield sites have helped to limit development of agricultural land, but this still represents the permanent loss of a vital strategic asset. Despite national policies to protect the best and most versatile (BMV) agricultural land – under the Agricultural Land Classification[66] system grades 1,2 and 3a – 30-40% of land developed was BMV. Planners and government officers recently interviewed by DEFRA ranked 'preservation of BMV land ... among the bottom two of planning issues'.[67] On a local scale, land lost to development may include the only soil suitable for growing particular crops in the area.

CPRE's recent ***Vision for Future of Farming*** sets out our aspirations for truly sustainable farming and food by 2026.

Case study: Apple source?

Apples are the UK's second favourite fruit, just after bananas; each year we eat some 680,000 tonnes. The UK is a prime environment for growing apples and over 2,300 varieties originated here.[72]

Yet only one in three of the apples we eat is grown here.[73] The UK apple industry has been badly hit by a combination of cheap fruit on global markets and the purchasing power of the superstores, as well as EU policies and highly effective French advertising of their Golden Delicious in the 1980s.[74] Many apple orchards have been lost: in the last 25 years more than half have disappeared (56%, with 31% in the past decade).[75] Their disappearance diminishes a rich cultural and ecological inheritance.

UK farming and economic issues

Farm size

Average farm size in the UK has been on the rise since the mid 20th century, while the number of small and medium-sized farms has declined. The average holding size in England – excluding very small holdings – increased between 2004 and 2009 from 111 to 119 hectares. Small and medium-sized farms declined rapidly (from around 45,000 small farms in 1987 to 34,000 in 2003, and 32,000 to 22,500 medium farms). Size increases may yield economies of scale, but at the risk of more uniform landscapes – though the rise in very small holdings could increase landscape diversity.[68] These dramatic changes are very evident in the dairy industry. Average herd size was 78 cows in 1997 rising to 113 today. The UK national milk herd has declined by over 40% since 1980; producer numbers have halved, from 35,700 in 1995 to 17,000 in 2008.

Indigenous production

The UK depends for 90% of its food supply on domestic production and 26 other countries.[69] When exports which could be consumed in the UK are factored in, we are 60% self-sufficient for all food types and 74% for indigenous types of food.[70]

The stability of the UK's food supply has for many centuries depended on trade with other countries, but this presents challenges to domestic production. International and national grocery chains can source supplies internationally based on lowest cost. UK producers farm to high environmental and welfare standards but are obliged to compete with imports not necessarily produced to the same standards. Though we continue to export produce, the net effect in recent years has been to depress UK production: according to DEFRA, 'since 1995 the UK trade gap in food, feed and drink has more than doubled.' The trade gap between UK imports and exports in 2009 was £18.5 billion.[71] In the past 20 years, quantities of home-produced vegetables have decreased by nearly a quarter (23%) while imports have risen by over half (51%). Similarly, UK fruit production between 1994 and 2004 fell by 24% by volume while imports grew by 38%. The UK is only 9% self-sufficient in fruit generally and this rises only to 16% for fruits native to the UK such as apples, cherries, pears and plums.

External costs of agriculture

The environmental costs of modernised, industrialised agriculture are often not reflected in the price of its outputs. These external costs or externalities, which are imposed on society in general, have been calculated at £1 billion to £2 billion a year.[76] Pretty et al. conservatively estimated these costs broken down into damage to the atmosphere (£316m), water (£231m) biodiversity and landscapes (£126m), soils (£96m) and human health (£777m).

Land-use planning

Background to planning policy

The main planning policy area which is relevant to local food webs concerns the development of town centres – and more specifically, policies related to retail development and competition.

The 1970s marked a turning point in the development of retail, with a shift away from town centres as the preferred location for retail growth. By the late 1970s, 40% of new retail floorspace was outside town centres, reaching 60% in the mid-1980s when planning policy was relaxed. The trend peaked in 1994 with '86% of new retail floorspace out-of-centre'.[77]

Current policy derives from concern at the impact on town centres of out-of-town regional shopping centres and large out-of-centre supermarkets. In 1996 Planning Policy Guidance 6 (PPG6) introduced a 'Town Centre First Policy' which placed the burden of proof on developers to show that developments were not harmful to town centres, that more central sites that could accommodate the development were unavailable and that the development was accessible by a 'choice of means of transport'. A further 'need test' was introduced in 1999 enabling local authorities to refuse an out-of-centre development if there was 'no demonstrable need in the next five years' and in the absence of a suitable town centre site. PPG6 was replaced by Planning Policy Statement 6 (PPS6) in 2005.

The policy remained substantially unchanged until 2009 when the Government rationalised its provisions on retail planning and incorporated them within the new PPS4: Planning for Sustainable Economic Growth. Policy essentials were retained but the need test had less prominence. There was policy to support the development of markets, including farmers' markets. An extensive good practice guide followed in 2009.[78]

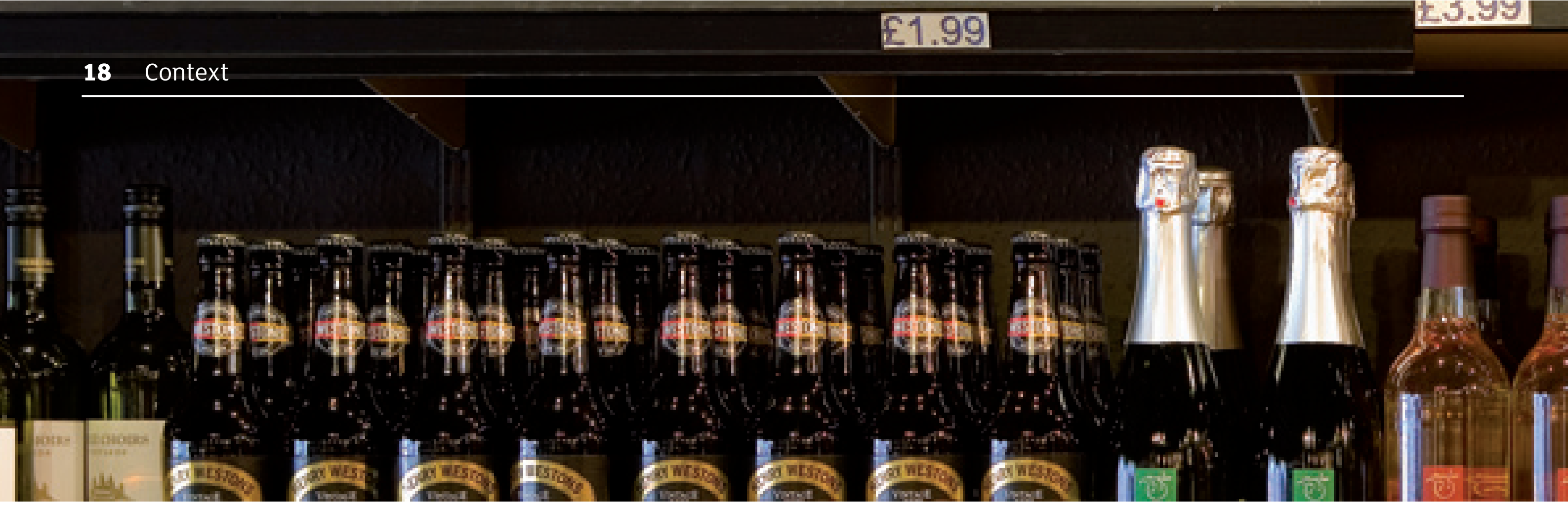
These policies have slowly reversed the trend away from out-of-centre developments, but have by no means stopped them. According to Michael Bach, one of the architects of this policy, the clarity it has provided and its consistent application has meant that 'since 2000 almost all of our top 50 city and major town centres have been regenerated'. He draws the lesson that 'relaxing policy produces rapid response, but reversing policy has a long time lag'.[79]

Despite supportive planning policy over some 15 years the prospects for town centres remain challenging. Twenty-five million square feet of supermarket expansion already in the pipeline will continue to weaken town centres. Bach suggests 'medium-size/smaller towns will continue to lose out if out-of-centre superstores selling non-food as well as food take their trade' and predicts 'further decline in the retail share of town centres due to supermarkets, the internet and retail parks – in that order'.[80]

Localism Act 2011

The Localism Act received Royal Assent on 15 November 2011. Among other things the Act abolishes regional spatial strategies (outside London), though they remain in force until revoked. To replace the strategic regional layer of planning, the Act brings in a duty for local authorities to 'engage constructively, actively and on an ongoing basis' with neighbouring local authorities and bodies such as National Park Authorities in the preparation of development plans and strategies.

A second major element of the Act is the introduction of neighbourhood planning via a series of optional provisions – neighbourhood development plans (NDPs), neighbourhood development orders (NDOs) and community right to build



orders (CRBOs) – which complement existing community planning tools such as parish plans and village design statements. These should allow communities greater influence on planning decisions, such as allocating sites for development, and areas such as housing; economic development requirements; retail, leisure and other commercial development; and protection and enhancement of the natural and historic environment, including landscape. However, neighbourhood planning must conform to the 'strategic elements' of the local plan.

National Planning Policy Framework (NPPF)

The Department for Communities and Local Government (DCLG) has described the NPPF as a 'a radical streamlining', replacing 1,000 pages of guidance with around 50 with the 'same legal status' and the same 'core approach and principles'.[81] The Coalition Government's expressed aims are to make national planning policies 'user-friendly and accessible', 'to free communities from unnecessarily prescriptive central government policies' and to 'empower … local councils to deliver innovative solutions that work for their local area'. Policies drafted by local planning authorities – usually in the local plan – must have 'regard' to the content of national planning policy.

The policies most relevant to local food webs are those covering town centre planning and retail development. Of the original PPS4 two of over 20 pages remain. Much detail has gone but arguably the provisions remaining are amplified by the absence of competing detail. Support for local food retail comes from provisions that planning policies should:

- 'recognise town centres as the heart of their communities and pursue policies to support their viability and vitality'
- 'promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres'
- 'retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive'.[82]

These references to a 'diverse retail offer' and the 'individuality of town centres' should encourage local authorities to support local independent businesses rather than chains, which can create the feel of a 'clone town'.

In addition, local authorities are required to 'apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan'.[83]

This means retail developments are required to use suitable town centre sites first, then edge-of-centre, and finally, only if none of these sites is suitable, out-of-centre sites. Preference is given to accessible sites that are well connected to the town centre. Applications that fail this test can be rejected.

Local authorities are also required to carry out an impact test for proposals over a given size – either a national default of 2,500m^2 (essentially a grocery superstore) or 'a proportionate, locally set floorspace threshold', which should be lower. The impact assessment should test the proposal for its effect on other 'investment in a centre or centres in the catchment area of the proposal' and 'on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area'.

The NPPF goes on to state: 'Where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused'[84]. There is also a requirement on applicants and local authorities to show 'flexibility on issues such as format and scale'.

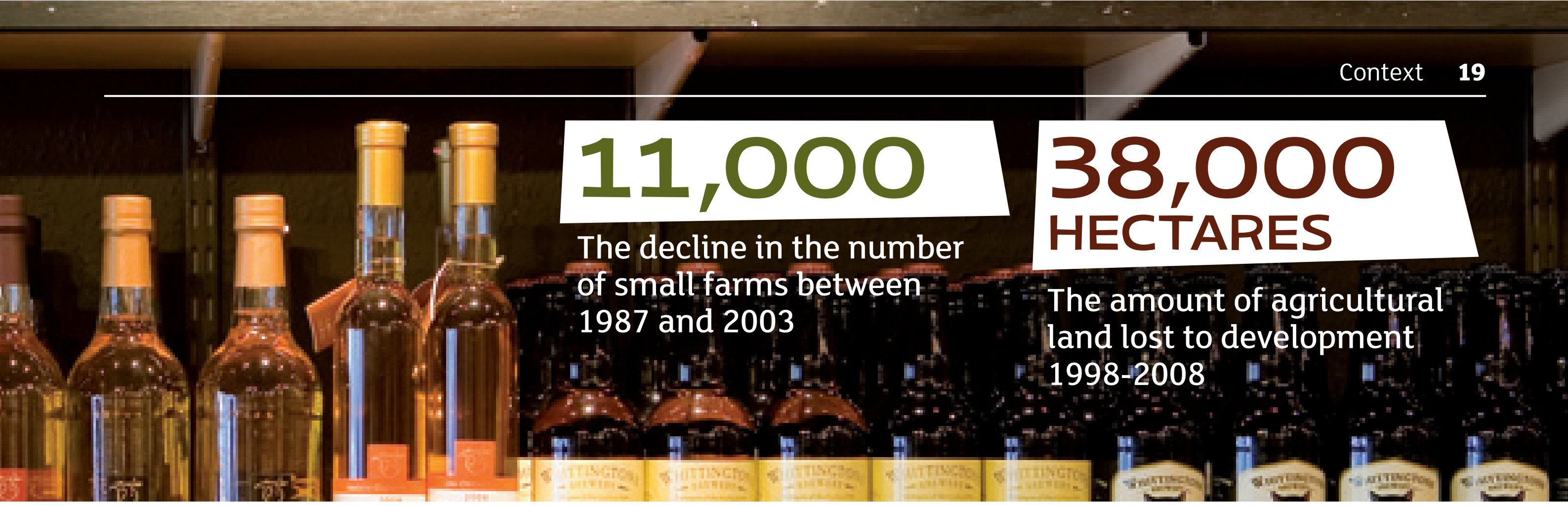
These provisions neither greatly weaken nor strengthen policy on prioritising town centres for new food development. Existing policy has not prevented huge expansion of out-of-centre supermarkets. Overall, unless further action is taken, the most likely outcome will be 'business as usual': further concentration of food retail, continuing decline of traditional town centres, deteriorating retail diversity and, with these, poorer local food provision.

The Portas Review

In May 2011 Prime Minister David Cameron commissioned Mary Portas, so-called 'Mary Queen of Shops', to carry out an 'independent review into the state of our high streets and town centres'. The report published in December 2011 outlines some of the 'fundamental changes in how we shop' and why high streets are declining. The report makes 28 recommendations which aim 'to breathe economic and community life back into our high streets' and make them destinations again.[85] Her vision sees high streets as important for developing community and 'destinations for socialising, culture, health, well-being, creativity and learning', not just retail.

The main recommendations of value for local food webs are:

- better town centre management via a 'town team' with more entrepreneurial activity including markets as hubs of retail innovation
- local setting of business rates, free



11,000

The decline in the number of small farms between 1987 and 2003

38,000 HECTARES

The amount of agricultural land lost to development 1998-2008

controlled parking, and deregulation of use class orders
- levelling the playing field with out-of-town/edge-of-town to re-establish 'choice and balance' through a 'presumption in favour of town centre development in the NPPF', an 'exceptional sign off for all new out-of-town developments' by the Secretary of State and an affordable shops quota in all large new developments; large retailers are to mentor and support smaller ones
- defining landlords' roles and responsibilities to discourage empty shops
- giving communities greater say including by promoting 'the inclusion of the high street in Neighbourhood Plans' and getting people involved in such plans; recognition that 'The planning system is too susceptible to those who can afford an army of lawyers' and 'People need a powerful legitimate voice and planning needs to be a much more collaborative process.'[86]

Since the review, the NPPF has been published and the Government has published a full response.[87] This sets out if and how Government supports her recommendations. Despite the high profile of the Review, the NPPF does not follow up its key recommendations in relation to planning for town centres. Portas does suggest a set of ideas to 'reimagine our high streets' including running a series of pilots to test 'proof of concept' and in February 2012, she and Local Government Minister Grant Shapps launched a competition to choose 12 'Portas Pilots', with the winning towns benefiting from a share of £1 million to help turn around their 'unloved and unused' high streets. The winners were announced in May 2012.

Case study:
Portas Review and neighbourhood planning

Mary Portas identifies the neighbourhood plans set out in the Localism Act as 'a real opportunity to get local people connected with their high street' and to give them 'a really meaningful say in the future of the place where they live, ensuring new activities are approved that contribute to local well-being'.

The process of engaging with planning should, she maintains, 'help people take ownership of, identify with and most importantly use their high street'. She recommends running a high profile campaign to get people involved in neighbourhood plans.

Portas strongly argues that neighbourhood plans should consider the high street and what mix of shops and services people would like to see there. A case study from Chatsworth Road in East London shows how the local Traders & Residents Association is producing a neighbourhood plan to enable them to better manage the mix of retail outlets on their high street, the type of shops given planning permission and the use of upper storeys of outlets to boost footfall.[88]

Characterising local food webs

The Mapping Local Food Webs project used individual towns across England as study locations. It was beyond the scope of the project to study the food web across several towns and villages, which could provide a much richer picture of an area.

Nevertheless, this national project provides evidence that local food networks are present to differing degrees in market towns, larger towns and cities across the country. It provides a snapshot of local food webs which undoubtedly are part of wider networks of businesses.

The scale and vitality of local food webs

Volunteers found local food on sale at a variety of outlets in every location, with direct links to many local suppliers, who in turn were supported by other local producers. Local food webs were present in all locations studied but varied in the number of outlets, supplier numbers, the range of produce, jobs supported, annual sales and customer numbers.

Locations such as Otley, Totnes and Ledbury with thriving food webs were characterised by the presence of a relatively wide range of smaller 'local' outlets with significant (25% or above) to very high levels of local produce (75-100%). Outlets stocking local food were usually independent or in some cases community enterprises. The highest levels were stocked, not surprisingly, at farmers' markets and farm shops, but also at butchers. These were closely followed by bakeries, general grocers and fishmongers with high levels (50-75%) and delicatessens, greengrocers and street market stalls with significant levels (above 25%). These traditional specialist stores – some in covered markets – are not widely recognised for trading in local produce, nor do they necessarily market themselves strongly on this. These locations also had supermarkets, though usually on more central sites which supported trips to the town centre.

In contrast, some locations such as Yeovil and Ely had fewer of the characteristics needed for thriving webs. They have few small 'local' food stores and outlets: instead, large supermarkets, out of or on the edge of the centre, were likely to be drawing trade and offering little local food. With low numbers of traditional outlets, farmers' markets and farm shops typically provided the best access to local food, but these were less frequent and less accessible respectively.

Types of local food available

Most food webs provide a wide range of local produce. Outlets were checked for 12 categories of produce: meat, processed meats, fish, dairy, fruit, vegetables, eggs, preserves, drinks, baked goods, cereals and other. There was a rough relationship between the strength of the food webs and the depth of produce available. The list below gives a sense of the richness and variety of local produce across the locations studied.

Meat
Beef, chicken, duck, game, goose, halal chicken and goat, hare, lamb, partridge, pheasant, pigeon, pork, rabbit, turkey, veal, venison, wild boar

Processed meat
Bacon, black pudding, burgers, cooked meats (corned beef, roast beef, pork, ham), dripping, haslet, hogs pudding, meatballs, mincemeat, pancetta, Parma-style ham, pâté, sausages (pork, venison, wild boar), scotch eggs, smoked meats, tongue, tripe

Fish
Fish (bass, bream, cod, haddock, herring, mackerel, plaice, salmon, sole, trout), fishcakes, shellfish (crab, lobster, prawns, whelks), smoked fish (haddock, mackerel, salmon, trout)

Dairy
Butter, cheeses (e.g. cheddar, goat's cheese, halloumi-style, Red Leicester, South Downs, Sussex Charmer, Stilton), clotted cream, cream, crème fraîche, ice cream/sorbet, milk (cow's, goat's, unpasteurised, Jersey milk), milkshake, yoghurt

Fruit and nuts
Apples, apricots, blackberries, blackcurrants, blueberries, cherries, chestnuts, damsons, gooseberries, grapes, hazelnuts, lemons (allotment grown), pears, plums, quinces, raspberries, redcurrants, rhubarb, strawberries

Vegetables
Vegetables – artichokes, asparagus, aubergines, beans, beansprouts, beetroot, broccoli/sprouting broccoli, Brussels sprouts, cabbages, carrots, cauliflowers, celeriac, celery, chard, chillis, courgettes, fennel, garlic, Jerusalem artichokes, leeks, marrows, kale, mushrooms, onions, pak choi, parsnips, peas, peppers, potatoes,

pumpkins, pulses, savoy cabbages, spinach, spring greens, sprouts, sprouted seeds, squashes, swedes, sweetcorn, tomatoes,
Herbs – coriander, dill, parsley
Salad crops – cress, cucumbers, lettuces, radicchio, radishes, rocket, salad packs, sorrel, spring onions, watercress

Eggs
Duck, hen and pullet eggs – biodynamic, caged, free-range and organic

Preserves
Chutneys, honey, jams, lemon curd, mint jelly, pickles, preserves, quince conserve, relishes, vinegar

Drinks
Ale, beer, cider, cordials (incl. elderflower), cuvee sparkling wine, fruit wine, ginger beer, juices, lemonade, mineral water, perry, smoothies, vodka, wine

Baked goods
Biscuits, bread, buns, cakes, cookies, crackers, flapjacks, fruit pies, gingerbread, oatcakes, pasties, meat pies, pizzas, pork pies, quiches, sausage rolls, vegetable pies

Cereals
Flour, granola, muesli, rolled oats

Other
Bhajis, chilli chocolate, chocolates, crisps, flapjacks, oils, pakoras, pesto, rapeseed oil, salad dressings, samosas, sandwich fillings, sauces, savouries, soups, sushi

Types of producer businesses

Some 220 supply chain businesses were interviewed initially, mostly producers supplying directly to outlets. We did further samples in main locations to identify businesses supplying other producers with ingredients (see sample Darlington map on page 9 – multi-stage supply chain links are shown in green). The large majority (69%) were micro-businesses employing fewer than 10 people, with a quarter with turnover of less than £50,000 per annum; 28% were small businesses and only 3% medium sized. Meat, fruit and veg, and dairy accounted for two-thirds of local supply lines, with baked goods and drinks also important. Local supplies of fish and cereals were low but likely to be constrained by geography (some locations were more than 30 miles from the coast) and the dominance of the east of England for cereal production.

Types of outlets

Volunteer researchers collected data on businesses stocking local food, focusing mainly on retailers. In some locations volunteers also interviewed pubs, cafés, restaurants, B&Bs and hotels to build a wider picture. In this section we concentrate on the range of retail outlets where local food was typically found. These include traditional specialist stores (butchers, fishmongers, greengrocers, bakers), farm shops, farmers' markets, town covered markets and street markets, box schemes, and a range of community enterprises such as community-supported agriculture, city farms and gardens, and Country Markets.

In the following pages we review the main types of businesses engaged in selling local food and, where data is available, an assessment of their scale nationally.[89] The section closes with a review of supermarket chains. Despite their strength in the market, these do not generally stock high percentages of local food. In practice they were difficult to interview systematically as volunteers made little progress in securing interviews with local store managers and were usually referred back to the company's head office. Some data is available from company websites, annual reports and press releases.

Table B: National breakdown of producer supply lines by product type

Product type supplied	Total supply lines (1,991)	%
Meat	397	20%
Vegetables	297	15%
Dairy	221	11%
Drinks	207	10%
Fruit	199	10%
Baked goods	194	10%
Preserves	160	8%
Eggs	143	7%
Other	95	5%
Fish	56	3%
Cereals	22	1%

100,000

The number of specialist stores lost between 1950 and 2007

68%

Average amount of local food sold from butchers we interviewed

Traditional specialist stores

Traditional food shops – such as butchers, bakers, greengrocers and fishmongers – have been a feature of towns for many centuries. Typically they are thought of as 'independent', 'small' or 'local' shops, though there are different views of how these are defined.[90] They have suffered a long history of closures in the past half-century, reflecting changes in shopping patterns linked to increased mobility and the arrival of self-service stores from the US. In the past there were also specialist national chains such as Dewhursts the butchers and Macfisheries fishmongers, with hundreds of stores each. Both disappeared from the high street before 2000. To this category could be added more recent types of small outlets such as delicatessens or fine food shops, cheese shops and wholefood stores.

Context: Traditional specialist stores

The traditional retail sector has been in long decline with heavy losses of stores over the past 50-60 years. This fundamental change in the grocery market is linked to the rise of self-service in the 1950s and the move towards out-of-town supermarkets. These in turn are related to the growth in ownership of cars and of fridges and freezers, increasing the options to buy in bulk and less frequently. Data from the Competition Commission for butchers, greengrocers, bakeries and fishmongers shows how severe these changes have been: from nearly 120,000 stores in 1950, by 2007 fewer than 20,000 remained.

Our own research brings home the impact on individual towns:

- In Otley, there were 32 such stores in the early 1950s and just 8 by 2011: butchers (14 down to 3), greengrocers and fruiterers (8 down to 1), bakeries (3 up to 4) and fishmongers (7 down to 0). In the same period general grocers have also fallen from 11 to 1.
- In Penrith the figures are as dramatic with over 35 such stores in the early 1950s down to 8 by 2009. This period has seen the loss of 3 bakeries (from 5 to 2), 11 butchers (from 15 to 4), 10 greengrocers (from 12 to 2) and 2 fishmongers (from 3 to 1). This haemorrhaging of choice and diversity may continue: Penrith has seen the development of two large supermarkets since our mapping work with as yet unknown impacts on the town's small shops.

The mapping work makes clear that traditional independent small shops like these are a central part of local food webs. They survive and trade on particularly in towns with stronger food webs, despite competition from supermarkets. Most of these outlets (over 75% of those we screened) sell local food, and many in significant to high percentages. For butchers the average (mean) of local food sold was 68%, bakeries 61%, fishmongers 55% and greengrocers 39%. Added to these are other small stores such as delicatessens and wholefood stores also selling significant percentages of local food (46% and 20% respectively).

Typically these outlets enable people to buy a wide range of local produce. Yet the amount of local produce they sell is often not understood, appreciated or widely known, and local produce may not be labelled as such at all. Sourcing locally is part of a traditional way of working, to ensure produce is of high quality and can be trusted. Even when local food is labelled, it is not always clearly defined, although our work showed strong evidence that plenty of produce comes directly from producers within 30 miles, through long-standing relationships with local suppliers.

Farm shops

There is little record of the growth of farm shops, but they have probably benefited from the same trends towards car ownership, self-service and bulk-buying that have weakened traditional town centre stores. Farm shops are one of several forms of direct selling, including farmers' markets, pick-your-own and roadside stands, which offer producers a much greater share of the food pound – typically 80-90% compared to 8-10% through normal channels to markets. Farm shops are a

Table C: Decline of traditional specialist stores 1950-2007

	1950	1982	2003	2007	% reduction 1950s to 2007	% reduction 2003 to 2007
Butchers	42,000	22,000	8,700	7,100	17% remain	18%
Greengrocers	44,000	18,000	4,700	3600	8% remain	23%
Bakeries	24,000	7,000	7,100	6,500	27% remain	8%
Fishmongers	9,000	3,000	1,600	1,300	14% remain	19%

Source: Competition Commission, 2008 [91]

prime and widespread source of local food: FARMA, which certifies, accredits and advises farmers wishing to set up a farm shop, suggests a model of 40% own-produced or local foods (FARMA generally uses a 30-mile definition), 40% regional produce and 20% from elsewhere.

Farm shops: key figures[92]

- There are 4,000 farm shops across the UK
- Annual turnover is estimated to be £1.5 billion (2005 figures)
- Based on an average nine employees per farm shop they support 36,000 employees, many part-time

Our mapping model surveyed outlets from within a 2.5-mile radius of town or city centres with the explicit intention to include nearby farm shops. This revealed 25 farm shops, or 5% of the fixed outlets we screened; 11 of the 19 locations we screened had one or more present. All 23 interviewed stocked local, with an average (mean) of 69% local produce, strongly confirming the view that farm shops are an excellent source of local food. Farm shops can provide a valuable opportunity for farms to diversify and to add value to their production. They also provide excellent access to local foods as well as providing essential local services when they are at or near the centre of villages. Local plans have policies to ensure that new farm shops don't undermine existing village shops which are most easily accessible and use conditions to specify the proportion of local produce. Poorly located, however, farm shops can generate car-based shopping which can be a trade-off against the benefits of local food.

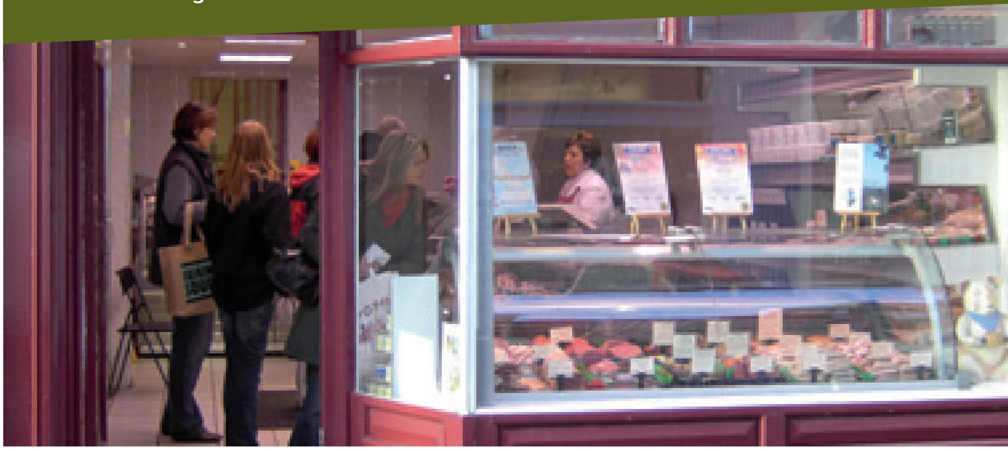
Case study: Woods Butchers, Knutsford

Established for over 100 years, with an eye-catching window display and an array of locally produced beef, pork, lamb, poultry and pies, Woods is a feature of Knutsford town centre. The shop attracts a large number of regular customers as well as tourists, bringing people into the town centre and supporting other traders locally.

Quality and traceability are at the heart of the business. Most meat comes from small, local, free-range farms, with over three-quarters of produce from within 30 miles. Meat is supplied directly from farms or increasingly from local wholesalers, who in turn source locally or produce their own. This helps reduce the administrative and logistical burden of dealing with many suppliers, while guaranteeing quality and traceability. With 35 years in the trade, owner Steve Connor knows all of his suppliers well and insists there is no better way to do business than to go local: *'A localised system of retailers, wholesalers and suppliers who know each other and work together as part of a community ... is the easiest way I can ensure the quality of our meat, and this is why our customers come here.'* His suppliers are keen on price too and are as competitive as larger suppliers further afield.

The recession has reduced demand slightly. People are spending less but his customers have stayed loyal. Steve concludes that, while their pockets may have been hit, his customers still demand quality and want to know they can trust the provenance of their meat.

For further case studies see the Field to Fork reports for:
Bakers: Otley – Bondgate; Yeovil – Ceres; Norwich – Pye
Butchers: Otley – Middlemiss Butchers; Kenilworth – Farmers Fayre; Newark – Sibleys
Greengrocers: Hexham – Justin Smart; Darlington – Blair's greengrocers



Case study:
Picks Farm and Farm Shop, Leicester – connecting people with their food

Availability of local food in Birstall is limited, but Picks Farm, just under three miles from the village centre, stands out. A traditional family farm, the organic-certified Picks Farm produces a range of cereals, fruit and vegetables, as well as Dexter beef, Gloucestershire Old Spot pork, grass-fed lamb, poultry and eggs. They sell much of this through their farm shop, which also stocks a wide range of other local and organic produce.

Selling directly to the public in the local area significantly reduces the distance produce has to travel from field to outlet, and by cutting out the 'middle man' they also benefit financially. *'We try to grow, rear and sell our food ourselves,'* says Nicky Chambers. *'At one time we did supply a little to restaurants and shops, but it's difficult to get the right price and much better to sell directly to the public. We do four local farmers' markets, which are very successful, but we recognised that our biggest asset was being located on a main road. We started by selling whole pigs out of our garden shed and that evolved to the farm shop we have now, with our own full-time butcher, who will cut and joint the meat to customers' requirements, and our own tea shop.'*

Nicky sees farm shops and farmers' markets as important because they can tell the story behind how food is produced: *'People like the environment here and it's not far from the city. They can come here and see the turkeys, ducks and geese. People want more knowledge. Children from the city don't easily get access to animals and will have eaten turkey but don't know what a live turkey looks like. We can help them reconnect to their food. The supermarkets can't tell this story. We can't compete with supermarkets on price, but people are prepared to spend more if they know they are getting something special.'*

For further case studies see the Field to Fork reports for:
Haslemere – Lower Roundhurst Farm; Kenilworth – Farmers Fayre; Ledbury – Durleighmarsh Farm shop

Farmers' markets

Farmers have traded their produce on markets for millennia but the idea of markets where only local producers sell their own produce is a more recent one hailing from the US. In the UK the first farmers' market opened in Bath in 1997 followed in 1998 by Bristol, Holmfirth, Lewes and Lostwithiel. There has been a rapid increase in the numbers of markets since, but some contraction during the recent recession.

Farmers' markets: key figures

Data from FARMA, which represents and accredits many farmers' markets, shows:

- 750 markets in England, down from a peak of 800 in 2008; only 200 of these are formally registered but these comprise some 60% of the total value
- an estimated total turnover of £250 million a year
- 4,000 farmers and 5,000 producers of other products[93]
- 27% of households or approximately 13 million shoppers visit a farmers' market at least once a year.

We found successful farmers' markets in towns and cities from Hexham to Haslemere. They trade in broadly two-thirds of the locations studied and are a very recognisable element of the local food web, although their frequency and so the access they offer to local food varies. Many are monthly but they can also be fortnightly or weekly. The form of management ranges from private businesses, local volunteers, the local town or borough council to co-operatives of producers, a model supported by FARMA and the Making Local Food Work programme. Not all farmers' markets clearly require goods to be locally sourced and produced or enforce this, which may undermine confidence in their authenticity. As a response, FARMA has

a national accreditation scheme which certifies that all products come from within 30 miles (or 50 miles in the North East).

The farmers' market model offers a number of benefits to producers, shoppers and the wider community, which exemplify the benefits of local food webs generally.

For producers:

- a lifeline to many smaller businesses, helping them to diversify into new areas and encouraging entrepreneurship through a direct route to market
- a direct link to consumers and the opportunity for feedback – though familiar to most service industries, this is a radical concept for farmers[94]
- a greater share of the farm-gate price or food pound, helping smaller farms to remain viable and farm in a less industrialised way: producers at farmers' markets tend to adopt more sustainable and traditional methods of farming and high standards of animal welfare.

For consumers:

- a direct connection with the source of their food – shoppers can find out at first hand how their meat is reared or how to cook unusual vegetables
- access to more environmentally sustainable food as well as fresh, local, seasonal, distinctive and specialist produce
- minimal packaging and loose food (i.e. not in pre-packaged quantities), so avoiding waste.

For the community:

- money is recirculated – every £1 spent on local food in a local outlet generates £2.50 for the local economy[95]
- increased footfall, supporting other

Case study: Otley farmers' market, West Yorkshire

***'Farmers' markets have been shown to preserve the life of towns'* by benefiting the immediate local economy and the wider rural economy and community, according to one trader at Otley's monthly farmers' market – and this seems to hold true in Otley.**

The farmers' market sells fresh and organic produce, direct from the producer and sourced as locally as possible. From just 12 stalls when it opened in 2002, the market now has nearly 50 during peak times – many more than at other markets in the area. Its reputation attracts visitors in droves – footfall is double the national average, according to a 2011 market health check supported by FARMA. The farmers' market directly supports the rural economy by providing local producers with a popular outlet for their produce and gives customers access to a wide range of distinctive local foods. *'There is a wealth of produce sold at the market, most of which comes from within 30 miles of the town,'* says manager Alan Robinson.

The farmers' market boosts trade in the town, he adds: *'We have lots of cafés in Otley and they now open on farmers' market Sundays and benefit massively. They reciprocate by helping to promote the market.'* Other outlets commented it is *'good for established traders'* and *'brings people to town and supports other businesses'*. For stallholders the market itself is a *'small network for trade'* with *'lots of trading between stallholders'*. Businesses also commented on the social benefits of the market including their educational value and their role in bringing people in the community together.

The market is run as a social enterprise, and profits go to the Otley Town Partnership to support its activity in the community. Its success has led the partnership to set up two new markets in Harrogate and Knaresborough, which are also thriving. Even so, many producers are suffering from the symptoms of recession.

For further case studies see the Field to Fork reports for:
Ely – Ely Farmers' Market;
Hexham – Hexham Farmers' Market;
Haslemere – South West Surrey Farmers' Market (co-operative)

£2.50

Amount each £1 spent on local food generates for the local economy

70%

Percentage of CSA members whose quality of life has improved

Case study: Canalside CSA at Leasowe Farm – Leamington Spa, Warwickshire

Canalside CSA was formed in 2006 by Tom Ingall, his wife Caz and a dedicated group of locals. It now has around 150 members from within 10 miles. The farm covers 140 acres producing organic vegetables, cereals, mushrooms and nuts. Professional growers manage the site, but volunteers get involved in growing and running the organisation.

Members have different reasons for joining. *'Once you start eating veg that's fresh and local, its hard to go back to supermarket vegetables which are flavourless,'* says Magali Fowler. *'Knowing who's grown your stuff is wonderful. It's such good quality and the price is either equal to or cheaper than supermarkets. It gives me access to countryside ... I really enjoy the community aspect of all the social events too.'*

'I really believe in the idea of sourcing local produce where we can,' says Annie Barker. *'It's a shame the produce in our main food chains has to come from so far away. I like organic produce ... I can feel it's just been picked: it's covered in dirt and it's so fresh and beautiful and there's lots of variety.'*

For further case studies see the Field to Fork reports for:
Hastings – Crowhurst Community Agriculture and Upper Wilting Farm; Ledbury – Dragon Orchard; Norwich – Norwich Farmshare; Otley – Swillington Organic Farm

businesses nearby; a study of Marylebone Farmers' Market in London showed that total annual turnover was approximately £1.3 million with around 55% of customers spending a further £295,000 at local shops in the vicinity[96]

- a regular social space for residents to meet, chat and spend time as well as somewhere for children to learn about healthy eating
- many volunteer-run markets use funds raised to benefit their community.

Community-supported agriculture (CSA)[97]

The community-supported agriculture model started in Japan in the 1960s where it is know as 'teikei' or 'food with the farmer's face on it'. The Soil Association defines CSA as a partnership between farmers and the local community, in which the responsibilities, risks and rewards of farming are shared. This can be through ownership, investment, sharing production costs, or providing labour. It is a flexible model, and CSA initiatives vary greatly. Projects range from five families to 200. One community-supported farm has 8,000 investor members. They can be farmer- or community-led and produce food on one acre or hundreds. Vegetables are most common, but produce also includes eggs, bread, meat, fruit and dairy. CSAs are also developing to manage woodlands for fuel and, more recently, to produce fish.

CSA: key figures

In the last four years, the number of CSAs in England has grown from 14 to over 80, with over 100 more in development

- CSAs provide food for 5,000 families

- and feed over 12,500 people from 3,200 acres of land
- There are approximately 70 members per CSA on average and most volunteer their labour
- The combined income of CSAs in England is £7m.

CSAs operate in nearly half the survey locations. The rate of growth and success elsewhere – there are 1,400 CSA schemes in the USA and over 12,500 farms selling through them[98] – show the potential. CSA offers a radical way to produce and supply food, capable of building strong partnerships between communities and producers, bringing numerous benefits.

For producers:
- a lifeline for many farmers and an opportunity to diversify
- people can start up in farming and horticulture with a relatively small area of land
- a secure, stable income from members means farmers can plan accordingly, and focus on farming
- a higher, fairer return for their produce
- voluntary help from members – on the farm and in areas like marketing.

For members:
- a regular supply of fresh, healthy produce, from a known, local source
- access to a local farm, where children (and adults) can learn about food and farming
- 46% say their health has improved
- 70% say their overall quality of life has improved
- over a third of participants say being involved has increased their skills (77% of schemes provide training)
- wider benefits of outdoor exercise through volunteer work in the fields.

For the community:
- CSA employment/hectare is five times higher than the agricultural average
- 66% trade with non-members, 38% with other local businesses
- 55% of CSAs planted more hedges and trees and 61% have introduced new wildlife areas
- CSAs are characterised by more cohesive communities, higher employment, sharing of skills, more local processing and concern for the environment.

Traditional markets

Markets have been a feature of human settlements since urbanisation began millennia ago. They have been the source of innovative retailers including chains such as Tesco, M&S and Morrisons. Yet, they have been referred to as the 'hidden sector' for the lack of national information about them available until recently. This has probably contributed to their being long overlooked by local and national government,[99] though there has been recent policy support in the Portas Review and the NPPF.

Traditional retail markets include street markets and indoor or covered markets. Wholesale markets make up over half the sector by value. Relative newcomers associated with local food include farmers' markets and Country Markets, which grew from WI markets. Traditional retail markets have suffered from competition with supermarkets, particularly out of town, and the decline of the high street. Research in 2009 shows they have had a mixed experience of recession in the late 2000s: some have fared better than the high street, some worse.[100] Krys Zasada of the National Association of British Market Authorities suggests that: 'Local factors such as lack of investment, quality of management and traders' offer, and poor location are likely to contribute to this mixed picture.'[101] Nationally they may be suffering from competition from discount retailers such as Aldi and Lidl, lack of marketing and promotion, and inability to change rapidly in a dynamic retail environment. The research concludes that 20-25% of markets could close by 2020.[102]

Traditional markets: key figures (for UK)

2,105 markets
- 1,124 traditional retail markets
- 605 farmers' markets
- 26 wholesale markets

47,000 market businesses
- over 45,700 retail traders
- 1,000 wholesale businesses

105,000 people directly employed
- 95,000 on retail markets
- 10,000 on wholesale markets

£7.6 billion annual turnover
- retail market £3.5 billion
- wholesale market £4.1 billion

Source: Smith, 2009 and Zasada, 2009:65

Food in various guises is an important aspect both in covered and street markets. Data is not available on local food sales at traditional markets. Yet both street and covered markets feature strongly in food web locations with street markets in towns such as Newark (five times a week) and Faversham (three times a week) and important covered markets in Shrewsbury, Darlington and Burnley among others. In these covered markets 82%, 73% and 35% of food stalls sell local food and a valuable portion sell significant quantities, though it may not be labelled as such.

Case study: Shrewsbury Market Hall has greater potential

Shrewsbury has been home to a market since the 10th century. In 1895 the open-air market moved to an indoor Market Hall, which was replaced in the 1960s. This houses over 60 traders selling china, collectables, arts and crafts, fresh fruit and vegetables, meat, fish, cakes and bread. Of 22 food traders 18 sell local food and for many, including five butchers, four greengrocers, two bakers and the local Country Market, local food is an important part of their turnover.

According to site facilities manager Katie Gittins, the market brings many benefits to the town including creating a *'sense of community by providing a meeting place for many people'*. Comments from numerous shop managers reflect the role of the market as a social hub. The market has continuity – core tenants stay for years – and a loyal customer base. There's also been a recent increase in new customers.

It was the main destination for food shopping for more than one in ten shoppers interviewed and used for top-up shopping by around a quarter (23%). Yet comments from businesses and shoppers indicate it needs a significant boost. *'Low footfall'* is a problem and *'better publicity'* is needed: *'the Market Hall is hidden and ugly and has no sign to show what it is'*. Another suggested: *'the park and ride could be marketed better, specifying park and ride to the Market Hall'*. One stallholder would like to see agreements between market traders on opening times as some stalls close before others, putting sheets up over the stall and giving the impression the market is closed. Katie Gittins agrees that *'street visibility is a problem. We need money to help make the market stand out.'*

For a further case study see the Darlington Field to Fork report: Darlington Indoor Market

Many of these stalls are essentially traditional specialists including butchers, bakers, greengrocers and fishmongers, with similar produce to fixed retail outlets.

Traditional markets are under-recognised as purveyors of local food: lack of labelling and marketing is an issue. Our sample of locations is too small to conjecture the proportion of local food sold at the 1,000 or more markets in England, but local food was important at the covered markets researched in particular. As accessible and affordable outlets for fresh food, markets play an important role in providing choice and town centre convenience for all types of shoppers. The presence of local food, albeit under-recognised, makes it clear that local food is not the preserve of middle income groups or a niche product – an impression that persists in England, in contrast to countries such as Italy or France, where local food sold in shops and markets is part of food culture across people of all incomes.

Country Markets

Country Markets, formerly Women's Institute Markets, bring together home-based producers to sell home-made, home-grown food and craftwork. The national organisation, Country Markets Ltd, is a co-operative social enterprise – life membership costs just 5p – operating across England, Wales and the Channel Isles. Markets are generally held in community halls or alongside other markets, usually weekly.

Country Markets: key figures
- 376 markets operate across the country, each belonging to one of 65 Country Market Societies
- Total annual turnover is just under £9 million with approximately 90% returned to producers

- The organisation nationally has 10,500 members
- Just under 8,400 members are active producers with an average of 22 producers per market.

Country Markets are present in about a third of the study locations (Hexham, Ledbury, Sheffield, Hastings, Yeovil), and others have them within around five miles. They form a small but valuable part of their local food webs. With long experience of selling high quality products, made by people in their kitchens at home, they are well placed to tap into the growing interest in the provenance of food. The organisation does not define 'local food' as such and some key ingredients – particularly butter, flour and sugar – may come from further afield, but producers live close by and will often use ingredients from their own gardens.

The markets offer a range of benefits to producers, customers and the community.

For producers:
- flexible, manageable work and the opportunity to earn extra money independently, apply and develop skills and confidence
- a low-risk route to markets and retail outlets to sell home-produced goods
- a sociable and co-operative network, with support from advisers, other members and access to legal and technical information and tailored marketing and promotion materials for indirect sales through local shops.

For customers:
- personal, friendly and pleasurable shopping experience
- affordable, wholesome, high quality, genuinely home-made and garden-grown goods
- seasonal and very locally produced goods.

Case study:
Broomhill Country Market Sheffield

Sheffield's Country Market meets weekly at Broomhill, catering mainly to the local population including students.

Over 20 producers sell a range of preserves, baked goods and seasonal fruit and vegetables. All produce is sold directly and co-operatively to the public. Shoppers know they can trust the products which are of high quality, home made or home grown. They can talk to producers, making it a friendly and fun experience. The market also has numerous environmental benefits: jars are re-used; packaging is minimal; produce is fresh with nothing frozen; and lighting is kept to a minimum; the customer base is very local, as are most producers.

For the community:
- support for local businesses and money kept in the local economy
- social interaction between producers and customers
- simple low-waste packaging.

Box schemes

Local stores have delivered to homes for generations. The delivery vans of national chains are a more recent but now familiar phenomenon, with home delivery food sales reaching £5.9 billion in 2011.[103] Organic box schemes, which date back to at least the late 1980s, are part of this. There is little available data on box schemes dedicated to local produce.

Box schemes: key figures[104]
- There are 500 home-delivery box schemes for organic products in the UK
- These range from individual producers with under 100 regular customers to Abel & Cole and Riverford, which both average around 40,000 deliveries per week and cover 70% of the market
- The organic home delivery sector grew strongly in 2011 – by 7.2% to £167 million – despite recession, but growth favoured the larger schemes with more resources for marketing and promotion. Smaller box schemes saw sales dip.

The research identified 15 box schemes supplying to residents spread across nearly half of the locations studied. Some locations had up to three schemes trading. While many of these were organic they also provided high levels of local food. The average local food percentage (mean) was 66%. Over half were in the highest range of 75-100% local and only two in the lowest (0-25%). Box schemes score highly on increasing access to fresh, seasonal, locally produced food and, because of the range of scales, supporting diversification and smaller producers. Though they don't directly support town centres, they offer an important alternative for people with busy lives, without access to shops selling fresh local food, or who can't or don't want to do the supermarket run.

Case study: Riverford Organic

Riverford Organic began when Guy Watson started delivering vegetables locally to 30 friends in Devon.

It now generates £41 million in retail turnover and supplies around 40,000 boxes a week of veg, fruit, meat and salads to homes nationally. From their family farm, the Watsons also run three farm shops, a wholefood shop, restaurant, dairy and butchery, all of which promote, produce and sell seasonal, local and organic foods. The business now employs 450 people across the UK.

'We have four farms around the country, helping us to keep our food miles down,' says Guy. *'As demand for our veg boxes grew, we didn't want to grow any larger from the original Devon farm. Each Riverford farm helps us to support local farmers, provide local employment and build a strong link between grower and consumer.'*

The business is focused on encouraging people to eat locally and seasonally: *'During autumn almost 100% of what goes in the boxes is local and seasonal.'* As Guy makes clear the business does import some produce, including from a Riverford-owned farm in France, to *'plug the hungry gap'* and *'imports probably account for 40% of what we sell.'*

Riverford is part of the South Devon Organic Producers co-operative of 20 farms, which work together to improve efficiency. The co-operative agrees a cropping programme with Riverford and the farms share labour, equipment and expertise. Riverford acts as sales agent so members get reasonable prices without having to sell their own produce. *'The transactional cost of dealing with small producers is significant,'* says Guy, *'but it's part of our ethos to support small producers. The world is a lonely and brutal place for farmers and working in a co-operative is good socially and emotionally.'*

City farms and community gardens

Community food growing has become a hugely popular movement. Projects range from tiny wildlife gardens to fruit and vegetable plots on housing estates, from community polytunnels to large city farms. Some larger community farms and gardens employ paid workers, while smaller groups rely on dedicated volunteers. Projects bring together community groups and help people of all ages, backgrounds and abilities to improve their communities and environment. Groups may offer food-growing activities, training courses, school visits, play and sports facilities and out-of-school schemes. City farms and community gardens provide valuable opportunities for people in urban areas, in particular, to connect with local food – the mapping work found examples in Sheffield, among other locations. With their community ethos, and by providing access to fresh, very local fruit and vegetables, they have potential to play an important part within local food webs and in particular helping those on low incomes to eat well affordably.

City farms and community gardens: key figures

- The Federation of City Farms and Community Gardens supports around 120 city and school farms, up to 1,000 community gardens (600 are members) and over 4,000 community-managed allotments
- Members employ around 550 people and engage thousands of volunteers
- They have more than three million visitors and regular users every year; around 50,000 of these are school pupils
- Estimated combined turnover of members is £40 million a year
- Members provide around 2,500

training places for adults with learning disabilities each year
- At least 200 new city farms and community gardens are in development.

Supermarket chains

Grocery chains are not new. From the 1890s they rapidly grew to one-fifth of market share in 1920, and expanded from 8,000 to 13,000 outlets from 1920 to 1940.[105] Supermarket growth has been propelled by the advent of self-service and the spread of mobility through car ownership. The trend towards superstores and hypermarkets dates to the late 1960s. From just over 450 in the mid-1980s, there were over 1,100 by the late 1990s. To scale up, stores have moved out of town: by 2007 there were 1,500 out-of-town superstores, and the number is growing still.[106] This massive rise has been marked by the growth of Tesco's market share, from 13% in the mid-1980s to over 30% by 2006.[107] In a reverse of this trend, the multiples have also moved back into high streets through investing in the convenience retail market – Tesco Express stores and One Stops are the most prominent of the 3,000 or so stores.[108]

Grocery stores: key figures

Grocery stores/supermarkets are categorised by their size:
- traditional retail/convenience stores – under 3,000 square feet
- supermarkets – 3,000 to 25,000 square feet, selling a broad range of grocery items
- superstores – over 25,000 square feet, including non-grocery items
- hypermarkets – over 60,000 square feet.

According to the Institute of Grocery Distribution (IGD) there are 88,441

Case study:
Heeley City Farm, Sheffield

Heeley City Farm and its café, set in a deprived area of Sheffield, reach out to the community in numerous ways.

'We work with Sure Start to help children learn about eating well,' says farm manager Jill Brooks. *'We also work with children with learning difficulties. They particularly like to work with animals. We provide a community atmosphere and meeting place [including] for schools and health services.'*

The farm has three growing sites including Wortley Hall Walled Garden just outside Sheffield. Set up as a social enterprise in 2004, the garden supplies organic food to local shops, restaurants and farmers' markets. The garden also provides learning opportunities through local food courses, workshops and volunteering, educational visits for schools and public events.

See other case studies in Field to Fork reports:
Sheffield – Whirlow Farm Trust;
Faversham – Abbey Physic Garden;
Burnley – Burnley Cropshare (Growing Communities Start-Up scheme)

grocery stores with a combined sales area of over 200 million square feet, comprising:
- 9,192 hypermarkets, superstores and supermarkets
- 48,056 convenience stores
- 31,193 traditional retailers.[109]

Food and groceries account for 50p in every £1 of retail spending. Latest data on grocery market shares shows the following: Tesco 30.7%; Asda (including Netto) 17.6%; Sainsbury 16.6%; Morrisons 11.9%. The Co-operative[110] and Waitrose had 6.5% and 4.5% of the market with all multiples totalling 97.8% market share with 2.2% at symbol groups (convenience store groups such as Londis and Spar) and independents.[111]

Supermarkets and local food webs can and do co-exist. Cranbrook writes: 'The area [East Suffolk] has benefited from an approach that supports a *variety* of retail outlets including a range of *small and medium-sized* supermarkets in the market towns. Within this framework small businesses can not only start up but flourish.'[112] Supermarkets exist in all of the towns and cities we surveyed, including those with relatively thriving food webs such as Totnes, Otley and Penrith.

The presence of supermarkets is not an obstacle – but their number, scale and location may be. Moderately sized supermarkets, well located and well connected with town centres, draw shoppers and support a centre's overall vibrancy and attractiveness. This is the case in Totnes, with several small supermarkets and one medium-sized Morrisons near the high street. But larger stores at the edge or out of town especially in small market towns, can shift the shopping centre of gravity and the largest stores – particularly hypermarkets – offer grocery but also 'comparison' goods such as clothing, pharmacy and kitchenware which compete with other specialist stores in the town centre. Hexham's Tesco Extra hypermarket on the edge of its centre takes 45% of all shopping in the district but stocks only seven local products.[113]

Supermarket chains remain the most challenging competitors to the specialist shops, markets and farm shops which stock high levels of local and are vital to food webs. So what place, if any, do they have within local food webs? We assessed the 'big four' – Asda, Morrisons, Sainsbury's and Tesco – on five criteria, based on internet research.

a) Commitment to local sourcing
Asda – states that local sourcing is a fundamental part of its business and local turnover is now as large as some major food categories; has a dedicated local sourcing team.
Morrisons – no specific reference to local, but they claim to always source British if 'the quality, quantity and value are there'; the 'vast majority' of vegetables are British and 'all of our standard milk is sourced regionally'.[114]
Sainsbury's – no specific reference to local, but discusses 'sourcing with integrity' and supporting British and regional farmers.[115]
Tesco – has a website dedicated to local foods and local sourcing and lists local sourcing under 'Buying and selling products responsibly' in its CSR report.

b) Local food as a share of total sales[116]
Asda – declared turnover of local food is £1 billion (2001-2011), so averaging £100 million a year or 0.6% on total grocery turnover of around £16 billion but would be a higher share of food sales alone; they have ambitions to grow this to £0.5 billion by 2013
Morrisons – no data
Sainsbury's – no data
Tesco – declared sales of local products £1 billion in 2011, up from £850 million in 2009; equivalent to, we estimate, 3.5% of grocery turnover; but a higher share of food sales alone; this total is too high as Tesco defines local food for Ireland, Wales and Scotland as food produced within the country.

c) Distribution arrangements
Asda – flexible delivery either directly to store, into local depots or via a network of local hubs that 'work directly with small local suppliers' and manage the relationship for Asda[117]
Morrisons – regional distribution centres
Sainsbury's – regional produce hubs
Tesco – no information found.

d) Definition of local
Asda – 'We define local products as those that are made locally, grown locally and reared locally; are a local taste or delicacy and recognised by customers as local'; indications are Asda uses a 30-mile definition[118]
Morrisons – no definition
Sainsbury's – no definition
Tesco – 'Local lines are those produced and sold within a county or neighbouring county in England, or within the country in Ireland, Scotland and Wales.'[119]

Across the 'big four' supermarkets, the proportion of local produce by turnover remains minimal compared to most of the independent outlets we screened

e) Local lines and suppliers
Asda – works with 'over 600 local suppliers' and stocks 'over 6,000 different local products'[120]
Morrisons – no data
Sainsbury's – over 3,000 own-label and branded regional products
Tesco – stocks 'approximately 4,000 local lines and works with over 400 local and national suppliers' (this leaves the number of local suppliers unclear).[121]

Asda and Tesco deserve credit for showing a commitment to local food, and their support for local suppliers can help to stimulate local food businesses. Nevertheless, the proportion of local produce by turnover remains minimal compared to most of the independent outlets we screened. In contrast, the regional supermarket chain – Booths in the North West – shows that it's possible for large stores successfully to stock impressive levels of local/regional food. The East of England Co-operative is also rapidly growing its locally-sourced lines and is committed to trading fairly with suppliers. A new model, The People's Supermarket in Islington, is a social enterprise with strong values akin to local food webs: access to healthy, local food at reasonable prices, strong connections to local producers that are 'mutually sustaining', minimising wastage and a community ethos at its core.[122]

But there is another compelling reason we have excluded supermarkets in general from the local food webs we report on here. The dominant business model of the majors (in particular the 'big four') is expansionist: they prey on the existing diversity of towns and local centres and, while in high streets in some areas, they develop large out-of-town stores in others to grow their market share. This undermines centres and their smaller traders. In contrast,

Case study: Booths: The Slow Food supermarket

Booths is a regional supermarket chain with 28 stores across Lancashire, Cheshire, Cumbria, Yorkshire and Greater Manchester.[123]

It has a strong reputation as the ethical choice among supermarkets, and local and regional sourcing polices are at the heart of its business model. At least 25% of all products in its stores come from local or regional producers and processors; 85% of its meat and 65% of its bread is from the region; when in season, 100% of its tomatoes are British. Local air-dried ham, lamb, milk, cream, sausages, cakes, breads, cheeses, apples, venison, yoghurt and even jalapeno chillies are all stocked.[124]

In 2011 Booths formed a four-year partnership with Slow Food UK to promote quality, provenance, seasonality and regionality. It supports educational projects like *The Ark of Taste*, a listing of exceptional foods under threat from the current food system – 49 UK products are listed.[125] As part of this, Booths now provides an outlet for a range of forgotten regional foods such as Morecambe Bay shrimps, Grimsby smoked haddock, Lythe Valley damsons, and Formby asparagus. Booths has won awards from Business in the Community (BITC) for responsible business practice for support of local farmers and producers supplying traditional breed dry-aged beef.

Booths' commitment to local and regional produce is to be applauded, but its growth in the small market towns where it tends to operate can be a challenge to smaller independent and distinctive local shops. Yet, unlike some national supermarket chains, Booths sticks to supermarket format stores: the average store size is 18,000 square feet. Though they are opening new stores, their expansion plans are modest compared to others; they have no current plans to move into the South East.

Case study:
The East of England Co-operative: 'Sourced locally is miles better'

The East of England Co-operative Society, the largest independent retailer in East Anglia, has more than 200 outlets across Essex, Suffolk and Norfolk. Annual turnover exceeds £350 million (2011-12 figures) and it employs over 4,600 staff.

Local sourcing began in 2007 with a handful of suppliers. Supplier numbers and sales of products have grown each year. In April 2011 it launched a new *'Sourced Locally'* brand for all its supermarket and food stores, with hundreds of locally sourced products. In the first year, the initiative was responsible for £7.1 million of a £7.9 million increase in food sales sourced from local suppliers. Over £15 million has been spent with 114 local suppliers to date, creating 100 new and supporting many existing jobs at suppliers.

The Society has a five-point commitment to support its local producers. This includes trading fairly and honestly with local producers, working with them to provide quality products and save food miles, and increasing customer choice by stocking more local products. Stable long-term relationships enable suppliers to trade profitably, and in many cases to expand: local producers such as Ken Green Fish from Clacton or potato and crisp producer Fairfields Farm have taken on new staff and expanded their businesses.

'We put products into the store closest to the producer and this is often just a few miles, or in some cases a few yards, from our stores and where possible no more than a 30-mile radius,' says local sourcing manager Kevin Warden. *'When fresh produce is available it can be picked, packed and in the customer's shopping basket within a few hours.'*

Sourced Locally
...IS MILES BETTER

local food webs embody the values and virtues of diversity.

Convenience stores

Convenience stores – 'stores with sales area of less than 3,000 sq ft, open for long hours and selling products from at least 8 different grocery categories'[126] – and general grocery stores are familiar as 'local', village and corner shops. They make up half of all food stores (54%) and include co-ops, multiples, 'symbol' groups[127], independents and forecourts. Slow decline is the overall trend for this sector but marked by steeper decline for independents: dropping 3.4% from 20,351 (2010) to 19,652 (2011) in just a year.[128] In response, symbol groups have grown as retailers join together to increase their marketing, branding and buyer power. Other trends are the move of multiples into the sector – in 2002 Tesco bought 862 stores[129] – and continuing loss of village shops. Community-owned stores are a viable model offering hope to restore some village shops.

Community-owned village stores[130] – key figures

- Have grown from 33 in 1991 to 251 in 2011; annual growth of 19
- Have 97% success rate as new enterprises
- Estimated combined sales of £33 million a year
- 98% sell local produce
- Typically employ around 2 staff, create 30 volunteer placements and have more than 130 members

General grocers and convenience stores were included in the screening of stores across locations for sales of local food. Of 84 screened 45 stocked local food with more independents stocking it (49%) than symbol stores (39%). Of 19

mainly independents interviewed, their local stock percentage by sales value was on average 29% (mean) with a pattern of a handful of stores sourcing high levels but the broad run in the 0-25% category. Though on recent figures for independent stores this could mean some 9,000 such stores in England could be selling local food, we lack the data to confirm this.

Out-of-town stores undermine town centres and their smaller traders. In contrast, local food webs embody the values and virtues of diversity

Case study:
Spar County Store, Ledbury

'When we source from local producers we are getting something unique to us,'* says John Ewens, store manager. *'It's the one thing that makes us different on the high street and local products are bound to be fresher.'

County Stores stocks a wide range of local foods: cider, beer, crisps, ice cream, pies, bread, eggs, soft fruit, salad bags and tomatoes in season, and meats from Gurneys, the local butcher. Open until 10.30pm seven days a week, it's convenient for people wanting to buy local food out of general business hours. *'On the whole, customers prefer to support local producers,'* says John. *'Generally the prices are in line with what we would buy through the wholesaler.'* Downsides are that local producers can only supply fruit, vegetables and salads when in season and dealing with multiple suppliers and invoices is more work, but, says John, *'the benefits more than make up for it.'* SPAR, the world's largest international food retail chain, is the UK's leading convenience store group, with over 25,000 stores with sales of over £2.7 billion a year.[131] Stores are managed independently and if all managers sourced locally like John, they could significantly boost the local food economy.

Main findings

This section sets out the main findings of the project along the lines of the individual location reports. There are four main parts:

- local food and local economies
- local food and local communities
- local food and the local environment
- local food and local policies.

These findings come from statistical (quantitative) and thematic (qualitative) data collected by volunteers, regional co-ordinators and report writers in 19 survey locations by interviewing outlets, producers and shoppers. They were collated, standardised and analysed at CPRE National Office.

Statistical analysis has been used to estimate the value of local food to the local economies of survey locations. Estimates are based on samples extrapolated to larger populations. We have extrapolated the data further to calculate very broadly the potential value of local food webs nationally. We have assumed a reasonable degree of representativeness in our survey location sample, which is geographically spread and covers small, medium and large towns and cities. Estimates are conservative as we only apply a multiplier of one for large cities.

Thematic findings are drawn from comments organised and coded by theme locally, then checked and collated nationally. Generally we have only reported themes with a medium to large run of comments (100+) and mainly from businesses. Where possible themes are corroborated by many interviewees (20 or more). Shopper surveys were analysed both thematically and statistically.

£132 MILLION

Annual sales of local food from independent outlets in 19 locations

£22

Average weekly spend on local food

46%

Growth in emissions due to shopping by car 2002-2006

Local food and local economies

The value to the local economy

Key findings

Attributes and benefits

Outlets

For the 19 locations surveyed with a combined population of 975,000[132] our analysis shows:

- local food sales through independent outlets are supporting total turnover of **£132 million a year**; an estimated 52% – **£68 million** – relates directly to local food sales
- sales of local produce accounted for more than 25% of turnover for over two-thirds of outlets (148 out of 218) with a third of outlets selling very high levels of local food (75% or more by value). The breakdown for the amount of local food sold (by turnover) was: 0-25% – 32% of outlets; 26-50% – 15%; 51-75% – 22%; 76-100% – 31%.
- local food outlets support **over 2,600 jobs** (full-time and part-time) of which **over 1,500** are wholly due to local food sales.

The high percentage of local food stocked by independent retailers shows its importance to their retail offer and their viability. These outlets are an important source of jobs (broadly half full-time, half part-time) and make a valuable contribution to local economies of the locations we studied and, we suggest, of other towns and cities and the rural areas that surround them.

For England we estimate:

- local food sales through local outlets (largely independent and social/co-operative businesses) in 747 towns and cities[133] to be **£2.7 billion a year**
- these outlets support over **103,000 jobs** (full- and part-time), with **over 61,000** due entirely to local food sales.

We carried out further analysis to compare the ratio of jobs to turnover in outlets which sell significant to high percentages of local food with national supermarket chains (Tesco, Sainsbury's and Morrisons):

- local food outlets support on average **one job for every £46,000 of annual turnover**
- **supermarket chains** support on average **one job per £138,000 to £144,000 of annual turnover**
- in comparison, **pound for pound, smaller independent 'local food' outlets supports three times the number of jobs.**[134]

Though these figures do not factor in jobs supported locally at producers or non-food businesses servicing the local food web, other research indicates that this effect extends down the supply chain. In Devon, more than half of all food businesses are involved in the local food sector. Producers involved in the local food economy employed on average 3.4 full-time workers compared to the regional average of 2.3 per farm.[135] A US report on local foods showed that fruit and vegetable farms not engaged in local sales employed three full-time workers for every $1 million in revenue, while farms selling into local markets employed 13 full-time workers for every $1 million.[136]

Supply chain businesses

For the 19 locations surveyed our analysis shows 2,000 local food suppliers with **£718 million** in estimated annual sales supported by trade within these local food webs. We estimate they employ **34,000 people**.

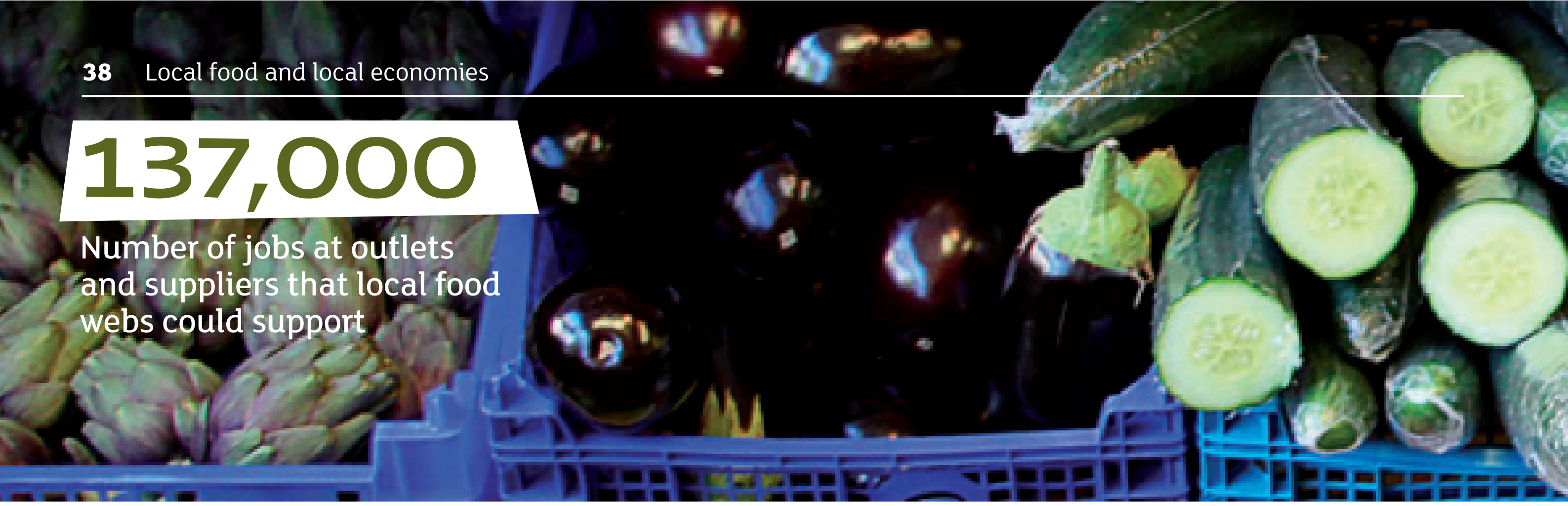
Local food outlets offer direct and indirect markets for micro and small producers that are unlikely to be available through the distribution channels of supermarket chains. Based on the sample interviewed, we calculated that **69%** of supply chain businesses were micro businesses employing fewer than 10 people. Around a quarter had a turnover of less than £50k per annum. Some **28%** were small businesses and **3%** were medium sized. Small and medium-sized enterprises (SMEs) are vital to the economy: they represent 99% of all enterprises, 58.8% of jobs and half of turnover (48.8%) in the private sector.[137] Their innovation and entrepreneurship creates the large businesses of the future: case studies indicate that local food webs are important for enabling business start-ups to trial products in small-scale markets.

Customers

Local food outlets serve **over 415,000 customer visits weekly** in the 19 locations surveyed – equivalent to two in five people (42.5% of population). Nationally we estimate that local food outlets could be servicing over **16.3 million people weekly**. They are an important part of consumer choice, regularly used and valued by shoppers.

Challenges and barriers

Local food enterprises support local economies by employing more people. However, the advent of national retailers can undermine this. Highly centralised supermarket supply systems are based on fewer, larger producers. Their growing dominance threatens the remaining local food chains and the diversity of food sector businesses they support. It is common for supermarket planning applications, particularly for larger edge- and out-of-centre stores, to boast of job creation. However, at best these jobs



137,000

Number of jobs at outlets and suppliers that local food webs could support

may merely displace jobs in the existing local food economy; at worst, there will be a large net loss of jobs. The National Retail Planning Forum, funded by major retailers,[138] explored the effects on employment following the opening of 93 edge-of-town supermarkets. The results showed that over a four-year period, there had been a net loss of 276 jobs in a 10-mile radius of each of the supermarkets, equivalent to a national total loss of over 25,000 jobs.[139] This study did not include florists, clothes shops and newsagents, suggesting even greater actual jobs losses. There has been little research of this nature since to inform planning decisions, as Portas notes.[140]

Context: Money trails

There is rising awareness that supporting local producers and retailers can support the local economy and these reasons for buying local food rank high on our and other shopper surveys.[141] A number of studies show how purchasing or procuring food from local sources benefits the local economy by re-circulating money locally. For example, the New Economics Foundation (NEF) concluded that income from organic box schemes generates about twice as much for the local economy as supermarkets.[142] Their research into 'money trails' gives many examples of how spending on local food keeps money circulating in the local economy measured by a 'local multiplier' figure:

- Cusgarne Organics, a farm with both local staff and local suppliers, generated £2 for the local economy for every £1 spent or a local multiplier of 2[143]
- In Plymouth, £384,000 or around half the school meals budget was spent locally 'on seasonal, local produce,' generating around £1.2 million of value per year, a local multiplier of £3.04 per £1 spent.[144]
- In Nottingham local food spending for school meals (currently £1.65 million per year) generates over £5 million in value, or £3.11 in social, economic and environmental value for every £1 spent. Due to the shift in focus towards procuring food seasonally and locally, the total amount of money circulating in the local economy increased from £181,418 in 2004 to £3,826,688 in 2011.
- Similar studies in Northumberland showed every £1 was worth £1.76 to the local economy if it was spent with a local supplier, but only 36 pence if spent outside the area. In other words, £1 spent locally was worth almost 400% more. It was estimated that a 10% increase in the proportion of the council's annual procurement budget spent locally would create an extra £34 million circulating in the local economy.[145]

Key issues

Our research shows the valuable role of local food webs in creating jobs and supporting the local economy, particularly in rural areas where other economic opportunities are limited. Conservatively estimated, local food webs could support turnover of **£2.7 billion** a year at local food outlets across England and **137,000 jobs** at outlets and suppliers.[146] Pound for pound, local outlets support three times the jobs of national supermarket chains.

Because local food web businesses keep money circulating in the local economy, they add value to the local economy: using a 'local multiplier' of 2.5 based on research by NEF, we estimate local food sales through local food webs nationally could generate £6.75 billion in benefit to local economies across England.

The relationships between networks of smaller food retailers and the local food supply chain back to primary producers are dispersed and numerous, making collecting data complex. It is easy for their presence to be overlooked. As a result, the scale, importance and wider benefits of local food webs are not widely recognised in policy. The research presented here, we believe, *underestimates* the scale and economic importance of local food webs: our volunteers focused on retail and could not survey all businesses using or supplying local food. For most locations, food service outlets (cafés, restaurants, hotels) and public procurement, and the businesses supplying them, were not included.

Recommendations for action

Local authorities – district councils and unitary authorities – should survey and map their own local food networks to ensure they are taken into account across a range of policy areas including economic development, tourism, the rural economy and retail and town centre planning.

Government should commission new research on the impact of out-of-town developments on town centres as recommended by Mary Portas and include impact on jobs in the wider local economy.

The economics of scale and competition

Key findings

Over 400 comments generated by interviews with outlets and producers were classified under this theme. Broadly, comments about operating within the local food market were more negative than positive at a three-to-two ratio. For producers there were equal

positive and negative comments, but for outlets negative comments outweighed positive two to one.

Attributes and benefits
Many positive comments from outlets related to the price benefits of operating within the local food market. They made it clear that buying local can be cheaper, and where not cheaper, the quality of the produce justifies the higher price. Comments from outlets – most of which sold local and non-local goods – suggest local food is fairly and competitively priced: **'good value for money'**, **'can be cheaper except when supermarkets have offers'**, **'realistically priced'**, **'good quality food at the right price'**.

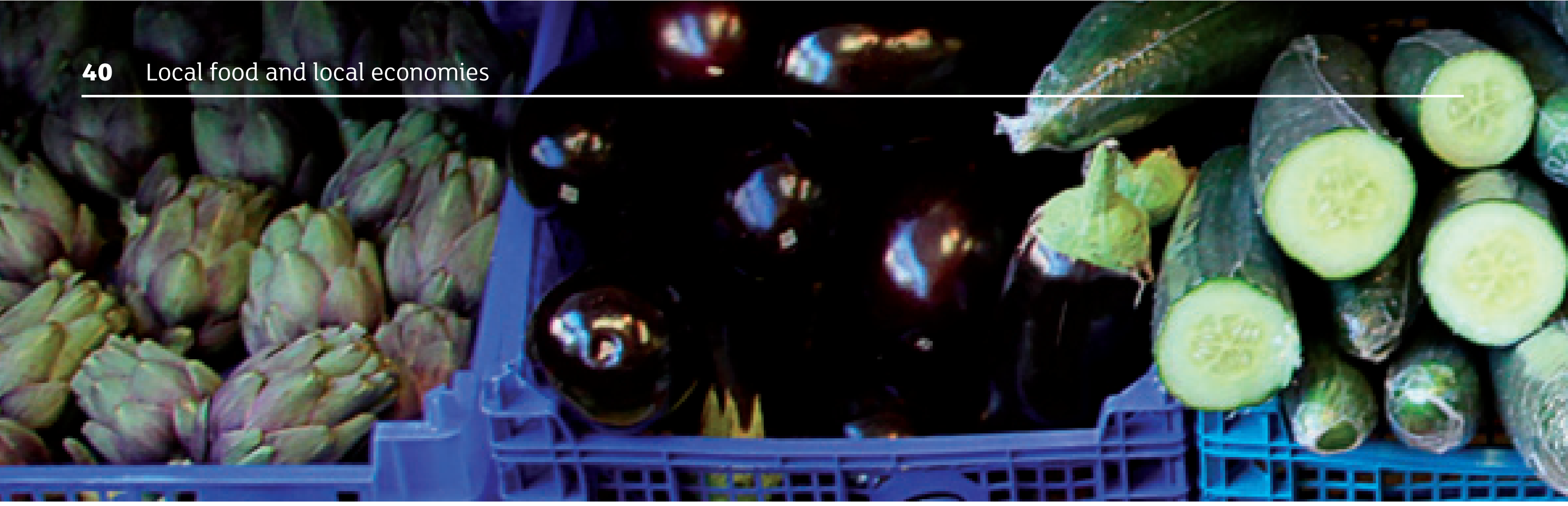
Other positive comments show the value to producers of trading in local markets. In particular, they can sell at a price which gives a real and fair return on their work: **'sensible return for the grower'**, **'sensible prices'**, **'far better off financially to supply smaller retailers'**, **'improved margin from supplying locally'**. Some of this comes from trading directly with retailers and other outlets: **'you can get a better return if you deal with the seller directly'** and **'control over the price of the product'** gives a **'higher percentage of the final price'**. Also, comments reveal that returns can improve as costs of supplying locally can be lower: **'cheaper to supply'**, **'cost effective'**, **'distribution is cheaper'** and **'less cost for the producer [on] transport and packaging'**.

Challenges and barriers
Many comments reflect the significant challenges to smaller outlets and producers of competing in tough markets, mainly against the large supermarket chains with their low prices and one-stop convenience – but also, on occasions, more local competition for what may be a limited market for local produce.

Outlets set out several challenges:
- While some said local food is cheaper, others see it as more expensive **'often'**, **'sometimes'**, **'occasionally'** or marginally – half of all negative comments relate to price. In shopper surveys, 58% of shoppers gave cost as a reason for not buying more local food. Outlets appreciate that local food producers are generally smaller and it is **'difficult to compete with big companies due to economy of scale'**. A complicating factor is that supermarkets can offer cheap food deals which can undercut even highly competitive traders.
- Local food can be seen to be more expensive even when it's not: according to one Hexham trader, it's **'perceived to be more expensive due to its being hand-produced not because it's local'**. Perceived price combined with real price differences dissuade customers from buying local food.
- Supermarket dominance can reduce supply as well as demand: wholesale networks have been weakened and producers supplying to supermarkets are less keen to deal with many smaller independent outlets: **'[There's] not so much available … because of supermarkets'** and **'Supermarkets reap all the stuff before independent retailers get to see it'**. One Darlington outlet commented: **'Some producers sell more expensively to independent shops [but are] desperate to get into supermarkets so sell cheaper to them.'**

Producers struggle to compete for a range of reasons, often interrelated:
- They cannot compete easily with larger companies with economies of scale – one Totnes producer cited the additional cost of transporting 15-20 pigs to the local abattoir, compared to major producers sending 200 in large trucks.
- Supermarket expansion has changed the wholesale market and forced consolidation of production, and market domination gives them the ability to control prices: **'Growers have had to get bigger to supply supermarkets. If they don't supply supermarkets, there isn't a market place for them. Supermarkets have caused this – a monopoly of growers – dictating the price'** (Ely producer).
- Competition is exacerbated by very low prices: **'food is sold at a cost below what it costs to produce it'** and producers bear the cost of supermarket promotions. **'People get lured into supermarkets by cheap prices. They don't realise it's the supplier who [is] subsidising 2-for-1 offers,'** said one Darlington producer. Low prices in supermarkets create consumers who **'aren't willing to pay a little bit extra for their product'**.

Context: Scale
Local food and small scale are closely related. Local markets are by definition bounded in some way geographically – by county, 30 miles or similar – limiting the size of the market. Locally, diversity of retailers and producers further breaks up the market between many players. Supermarkets operate in these markets but are usually supported by national-scale operations and logistics. As noted, most businesses in local food webs are small: 69% of those we interviewed were micro businesses with fewer than 10 employees and 28% small businesses.



The future of markets and the failure of competition policy?
A fundamental question is whether 'the concentration of the retail market [is] the sign of a properly functioning approach to competition, where the most efficient business models naturally eliminate their competitors, or whether the inability of small and medium-sized businesses to compete in fact represents the opposite: an uncompetitive market?'[147] The 2000 and 2008 Competition Commission (CC) inquiries into the grocery industry failed to tackle concentration of ownership. Schoenborn in *The Right to Retail* concludes the CC adopted the wrong standard for competition by focussing on 'abuse of market power' and 'harm to consumers'.[148] The origins of this lie in how competition and monopoly policy has been shaped in the US and the UK by economic theory of the Chicago School since the 1950s. Earlier regulation aimed to prevent small businesses being forced out of the market. The Chicago School put greater emphasis on benefits to consumer welfare of efficiency gains resulting from market concentration. Within this supposedly self-regulating market, monopolies would be prevented by new businesses entering the market.[149]

According to LSE economist John Kay, the 1950s model has derailed competition policy for the past 20 years. In his analysis the market economy has been triumphant because of three key elements: the heeding of prices as signals, the role of markets as processes of discovery and the diffusion of political and economic power. But competition policy has placed too much emphasis on the first to the detriment of the other two, resulting in 'arcane' and 'inconclusive' inquiries. Kay concludes there is a need for 'policy aimed at supporting the market, not supporting the industry: policy towards breaking up the industry not promoting concentration.' Policy should aim to support diverse and dynamic markets.[150] This line follows a different tradition of economic thinking, closer to Adam Smith, which holds that a competitive economic system underpins a 'free and equitable society' and that competition policy should go beyond preventing abuse of power by supporting an economy of SMEs which can drive economic growth.[151]

Key issues
Smaller local food businesses can struggle to compete in a retail market dominated by national supermarket chains. While local food in smaller stores can often be cheaper than at chains and excellent value for money, its high quality can sometimes make it more expensive – or shape perceptions that it is. Price – or perceived price – limits sales of local food. Conversely, supermarkets can, through economies of scale, buyer power, global sourcing and below-cost selling, undercut even highly competitive traders.

Supermarket dominance means smaller retailers may not survive, especially if larger stores 'capture' shoppers who fail to go on to shop in town centres. Retail diversity, choice and access may suffer.

Loss of smaller outlets threatens the markets for smaller producers. Though supermarkets could be by far the largest market for their produce, there are risks and challenges to supplying them. Large chains can demand terms which producers with few other markets are unable to refuse. Smaller producers may not be able to supply them because of scale or other barriers. So the loss of retail can lead to loss of diversity in the supply chain, which ultimately undermines local choice and competition.

Context: From Ombudsman to Adjudicator
The issue of buyer power of the major multiple retailers has been central to the grocery market investigations of the CC in 2000 and 2008. In 2008 the CC identified this as a potential cause for concern and also identified practices which were passing 'excessive risks or unexpected costs' on to their suppliers such as 'retroactive variation of contracts'.[152] The CC created a new mandatory Groceries Supply Code of Practice for all grocery retailers with annual sales of over £1 billion. It recommended that a new Supermarket Ombudsman be set up to enforce it. The Groceries Code Adjudicator Bill to bring this into being was announced in the Queen's Speech in May 2012.

Recommendations for action
The Government should ensure that legislation to establish a Grocery Chain Adjudicator to enforce the Grocery Supply Chain Code of Practice (GSCOP)

1 JOB

Local food outlets support one job for every £46,000 of annual turnover

69%

Percentage of producers interviewed that were micro-businesses (with fewer than 10 employees)

gives the Adjudicator wide-ranging powers to scrutinise and enforce fair trade in the food supply chain and to create a more level playing field for other retailers These should enable it to investigate proactively, and require changes to unfair practices and contracts brought to its attention by farmers, trade organisations, NGOs and other businesses in the supply chain. It should also have powers to levy fines where necessary.

Case study: Eddisbury Fruit Farm, Cheshire – the benefits of selling to local markets

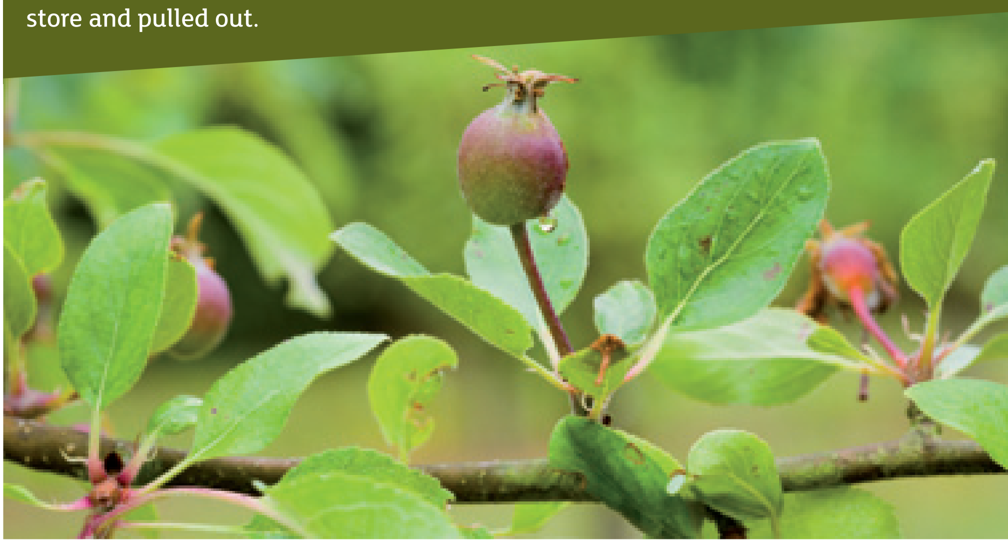
Eddisbury Fruit Farm, run by the Haworth family since 1936, grows 26 varieties of apple and produces award-winning Cheshire Cider and Cheshire Apple Juice.

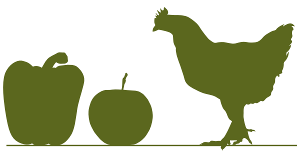
Their product is distinctive and popular with local outlets, and they sell to a loyal customer base of 100-150 businesses, mostly small retailers, farm shops and restaurants in Lancashire and Cheshire.

Eddisbury refuse to supply supermarkets for several reasons. Despite approaches, they weren't offered a reasonable price. Also, they were wary of supermarkets not paying on time, which would put enormous financial pressure on the business.[153] On the one occasion Eddisbury did supply a supermarket chain, they couldn't afford the charges demanded for shelf space and promotion of their produce in store and pulled out.

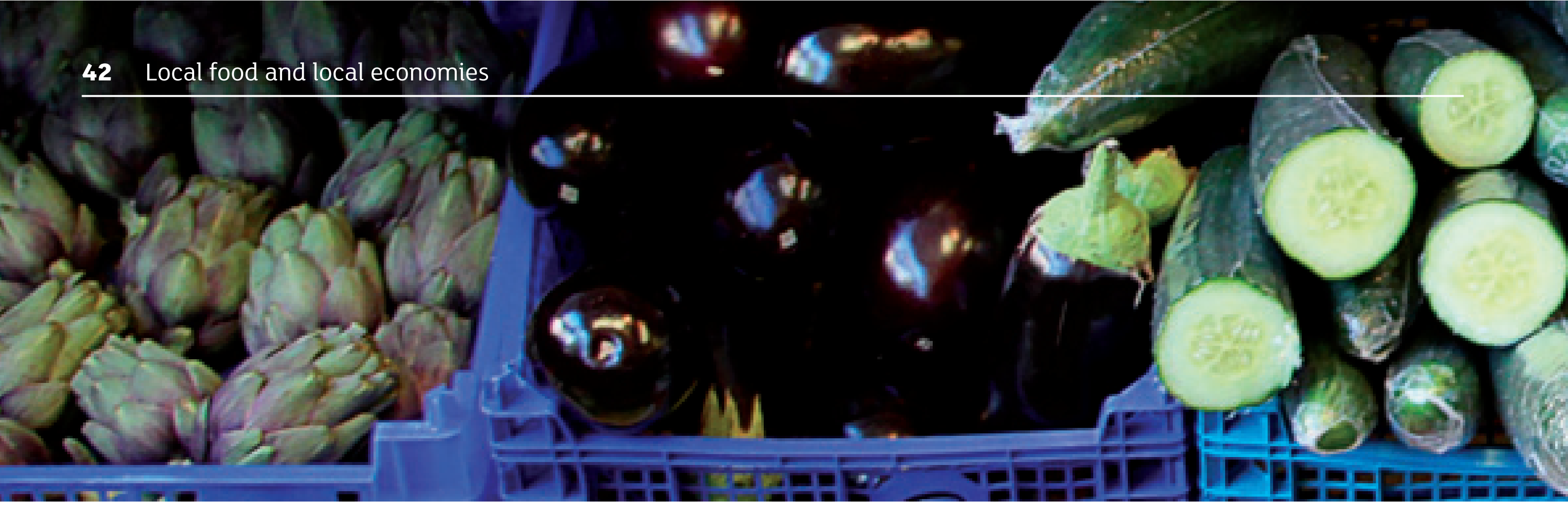
'It's the little shops that offer us a fairer price,' says Monica Howarth. *'If we were to supply the quantity demanded by supermarkets, we would have to drop all our small, loyal customers, and that is not something we are prepared to do.'*

Nevertheless, the rise of the supermarkets has affected them. Until 10 years ago, Eddisbury sold around 300 apple crates a week, mostly to local greengrocers via wholesale markets. But more and more greengrocers and wholesalers have disappeared. Their customer base now, mostly farm shops and restaurants, is more diverse and inherently less risky. As Monica recalls: *'many farmers who made the switch to supplying supermarkets have since lost their contracts, and now have nowhere else to turn.'*





Retail diversity, choice and access may suffer as a result of supermarket dominance



Business networks

Key findings

As part of questionnaire-based interviews food web businesses were asked whether they contributed to or benefitted from the success of other local businesses and if so how. This and other questions stimulated a very large number of comments (over 800) which we have themed under 'business networks'.

Attributes and benefits

Comments on the value of local business networks were overwhelmingly positive by a factor of 9 to 1. In terms of benefits to businesses the most important issues were:

- The value of businesses in a location working together and complementing each other in various ways, for example by attracting shared footfall and recommending each other to customers. Key shops such as specialist outlets, farmers' markets and supermarkets and certain products attract shoppers to the location, increasing trade for others; this extends beyond food outlets to other specialist outlets such as bookshops which can draw in customers. **'Good quality stalls at the farmers' market bring in footfall,'** said one Ely trader. **'There is a cluster of local businesses here which gives people a reason to come to the area.'**
- The value of businesses trading with each other locally (or community trading), in particular buying from other outlets or using other local services, so re-circulating money in the local economy: **'We're all mutually reliant,'** as one Haslemere trader put it.
- The importance of the relationships and community formed among businesses, built on trust and personal contact. Such relationships can operate where outlets are co-located **('We are market traders but we don't like to be classed as that – more as one big happy family')** or when businesses trade together. As one Totnes producer expressed it: '**We get to know customers very well and customers look out for your products. The manager of the greengrocer we supply accepts anything we produce of any quantity. It's done on trust. He knows it will all be of good quality. This trust is extremely important to the business.**' Such relationships enable businesses to support each other informally, for instance by sharing information, helping to deal with surplus produce or promoting each other's products.

Challenges and barriers

Few negative comments arose about business networks or trading locally. However, several themes emerge which represent a challenge to local food webs:

- The mutual dependence of clusters of businesses leaves them vulnerable: when one or more outlets close those nearby may suffer significantly. As one Hastings trader noted: **'The businesses all look after each other. If you lose one it has an impact on the others. The butcher's closed down and this impacted our Saturday trade badly.'** If the local retail offer in the high street or a local centre loses its attractiveness to customers, especially where it can no longer satisfy most of their shopping needs, then the loss of footfall and trade can further threaten the viability of those that remain. A vicious circle of decline can ensue.
- Comments suggest the need for a core of essential stores for the clustering effect to work: **'All small shops help each other. Towns need a good mixture of small shops to attract customers.'** Market traders were particularly aware of this **'complementary', 'synergistic**' or **'symbiotic'** effect. There may be tensions within this mix: though many commented that markets attracted trade and footfall to the benefit of all, some traders were wary of farmers' markets as additional competition, taking rather than attracting trade. Perhaps a threshold effect may operate – though at what level this lies is difficult to say. Where trade is strong and healthy then outlets may be less aware of competition, or value the stimulus it provides. But if decline has set in, possibly through significant supermarket growth and loss of outlets, then far from benefitting from less local competition, the remaining businesses are left fighting over a dwindling contingent of shoppers.

Key issues

Networks of smaller independent food retailers and other specialist outlets in town centres are mutually supportive in drawing footfall and boosting trade. They are important for ensuring that town centres (and high streets) can offer the range of produce to compete with one-stop superstores.

Food represents half of the average weekly shopping spend, so loss of food outlets in centres undermines their role as a key shopping destination. The loss of one or more of a range of food shops – butchers, bakers, fishmongers, greengrocers, delis, wholefoods, general groceries – can undermine the attractiveness of a location for all food shopping needs, especially if the choice of these declines. Loss of individual shops can

Case study: Moody Baker Wolf Pies made with Allendale Brewery Wolf Ale, Hexham

'What's in a wolf pie?' people ask the Moody Baker curiously… No, it's not made with a wild canine but with Wolf Ale from Allendale Brewery.

The baker and brewer sell alongside each other at Hexham farmers' market. The Moody Baker is a co-operative artisan bakery with food ethics at its core. They use local ingredients where they can, and have set up a community distribution system to help local businesses work together in their home town of Alston – for example by arranging for one retailer to bring back stock for another from markets. Allendale Brewery uses Northumberland malt and many of their ales are named after local wildlife, such as Golden Plover and Curlew's Return. They're reviving an old local tradition – the original brewery folded 120 years ago.

have a knock-on effect on other outlets, leading to a vicious circle of decline in the vitality and viability of the centre.

Recommendations for action

Local plan policy needs to support 'one-stop shop' town centres. Shoppers need to be able to meet all their shopping needs, especially for food, in town centres if they are to compete with out-of-town and internet shopping.

Local authorities should recognise the interdependence of smaller outlets and the key role of food outlets for attractiveness, choice and access. They should act to support the range and depth of retail outlets in the centre and to ensure centres offer a range of essential services through planning policies, active town centre management and business rate relief.

Businesses promotion and marketing

Key findings

As part of business interviews we asked 'What would help to sell more local produce?', which generated over 400 comments.

Attributes and benefits

A large number of comments from businesses under this theme – over a quarter – reflected the need for more promotional activities (advertising, publicity) and better marketing. A further half indicated the kinds of promotional activities businesses are already engaged in or looking to undertake. These include:

In-store marketing:

- presentation of produce via store displays and attractive shop fronts
- labelling, branding, logos, product tags and storylines
- free tasting
- 'meet the producer' events
- information in leaflets and newsletters
- discounts.

'External' marketing:

- joining local producer organisations (e.g. Produced in Kent), local or regional branding schemes and town loyalty schemes
- local media adverts, including newspapers, magazines and brochures, including school and parish magazines
- websites
- newsletters and leaflets
- attending events such as festivals, agricultural shows, farm open days, farmers' markets and campaigns
- sponsorship, donations and involvement in community events.

Informal marketing

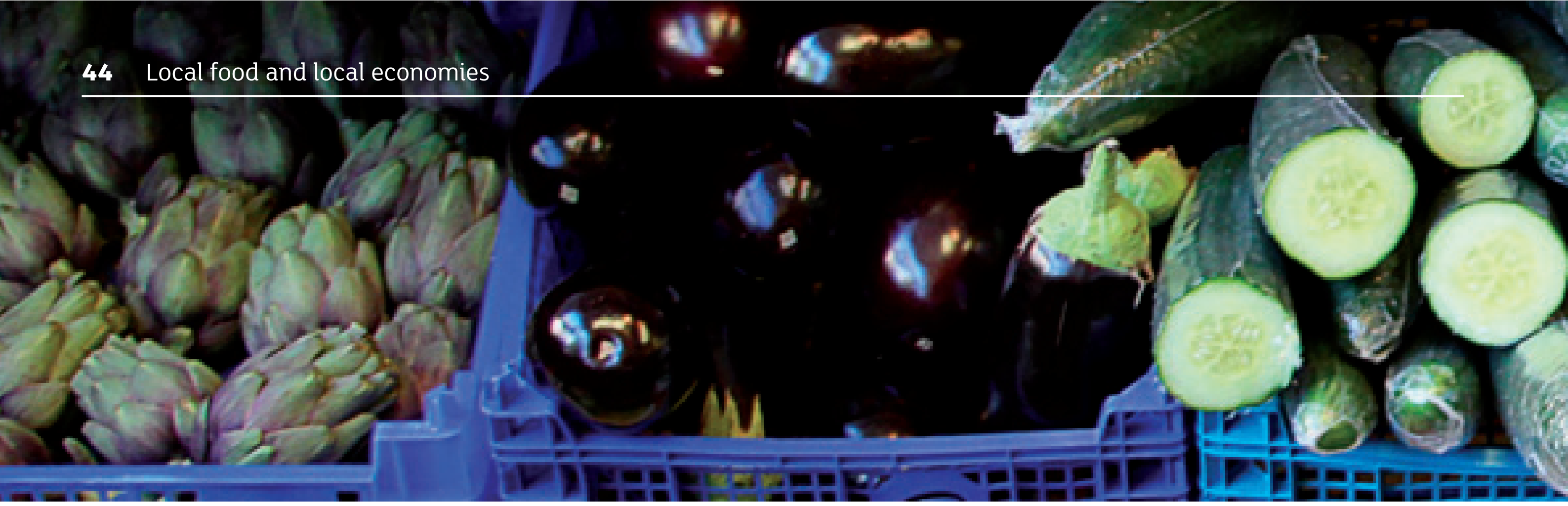
- conversations with customers
- word of mouth from customer to customer
- businesses recommending each other.

This range of activities could be deployed more widely and systematically to promote local food, producers and outlets, and local food webs generally.

Challenges and barriers

About one in 20 comments referred to the constraints some businesses faced regarding promotional work. These included the high costs or ineffectiveness of advertising (**'Advertising is a waste of money – [it] doesn't bring in enough customers to justify costs'**) and lack of time to market the business, particularly for smaller businesses with few staff.

A wider barrier identified was the need for better awareness and



Case study: Faversham Food Walks

Eight circular trails along public rights of way around the town were launched in May 2011.

Maps and detailed notes guide the walker through orchards, crop fields and grazing land and highlight local history, farming and local food producers. The walks also pass pubs serving local food and ale and B&Bs. Local businesses have already noticed the improved footfall since the walks were launched; they provide scenic walks for local people as well as attracting visitors to the area. The maps are available online: **www.faversham.org/walking**

Case study: Haslemere Rewards

Haslemere Rewards is an award-winning customer loyalty scheme, with over 30 businesses in Haslemere town centre and the surrounding area participating.

Customers earn points when they buy from businesses taking part, and get discounts and promotions. The latest innovation allows customers to pass their loyalty points on to a local school. It's a scheme now copied in other places across the country.

Case study: Totnes Local Food Hub

The Hub is a member-owned social enterprise which has received finance from the Local Food Fund to provide affordable local food to residents and a fair price to producers.

It will provide an umbrella structure for producers and the Children's Centre will act as a central distribution point. It will also work with the Hub project to get young children eating fresh, healthy, local food. As Holly Tiffen, a Hub volunteer, explains: *'We want to address the difficulties faced by small, local producers in marketing their produce, and provide a way for people – of all levels of income – to access good, fresh, local food.'*

understanding – and more education to achieve this – of food issues among the general public. Issues mentioned included building awareness of the realities of farming and food production, encouraging consumers to try new foods, **'making more customers more aware of what is local food and where it is produced'** and the **'need to connect people with their food'**.

Some well-established businesses felt little need to actively promote themselves, but a few sounded notes of caution: **'Local food producers seem to rely on word of mouth but sometimes word of mouth is not enough'** and **'There are many local producers that have terrible marketing strategies and therefore we don't hear about them unless we are approached.'**

A significant number of outlets wanted more information on what local producers are out there. There is a need for **'An information resource on who local suppliers are'**, where they are and what they have to sell. Some producers suggested that some form of joint initiative to bring them together could help.

Key issues

In many locations local food was often not clearly defined or labelled leading to a perception of poor availability. Outlets too are unaware of the presence of suppliers. Businesses lack time and other resources to market their products, and the range, choice and value of local food are not widely appreciated. Shoppers may not know which food is local and cannot make an informed choice.

Recommendations for action

Government should build on the first two Rural Development Programmes for

Case study:
'Local to Ludlow' – from small shoots to deep roots

Ludlow in south Shropshire is renowned for its local food, its traditional high-street, independent shops and seven Michelin-starred restaurants.

Its distinctive 'Local to Ludlow' brand' goes back to 1999 and a food and farming voluntary group led by Kate and Peter Norman dedicated to promoting the use of local food and drink in the town. Along with the Local to Ludlow brand, this led to a successful farmers' market and local food directory. The brand has its own professionally designed and trademarked logo. Initially awarded to local shops selling significant amounts of local food, it has since spread to restaurants, cafés and bed & breakfasts that sell or use locally sourced foods in their products or meals. Local to Ludlow's definition of local is: 'food or drink that is grown, reared, caught, brewed, pickled, baked, smoked or processed by the stall holder within 30 miles of the town[154], with no "bought-in" produce allowed.' The market and local businesses displaying the logo apply these criteria. The managing team visits new applicants, advises them where to find the best local producers and processors and promotes them via the Local to Ludlow website.

What are the secrets of the brand's success? *'Dedication, motivation and commitment are the keys,'* says Tish Dockerty, co-ordinator of the market and other Local to Ludlow initiatives. Also, the scheme works, she explains, because Ludlow is a very small town and it is well-known among local people. Public scrutiny means the brand isn't abused: businesses take it and their reputations seriously.

England to ensure there is adequate funding for local food and community food enterprises. Outlets should improve the marketing of local food by: defining local food clearly; signposting local food in their store through shelf sections, shelf labels, blackboards etc; giving out information on producers; organising tastings and 'meet the producer' events.

Local authorities should develop new projects to link local producers and outlets. They should support production of town centre and local area maps to highlight businesses selling local food and set up local food trails to encourage food tourism and build better links between towns and their local countryside.

Abattoirs

Key findings

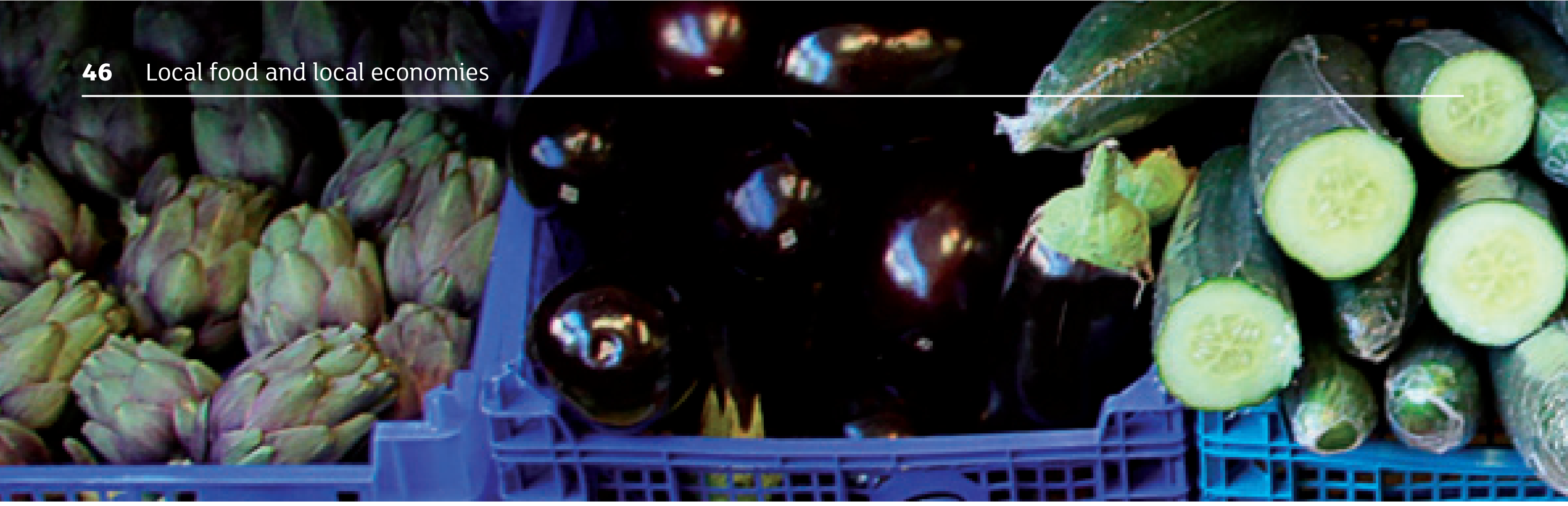
Attributes and benefits

'Cutting down the distance travelled' was a significant concern for livestock farmers. This is important for animal welfare as animals suffer from stress during transport. Shorter journey times also ensure it remains economically viable for smaller farms to move small numbers of animals. Several producers suggested that a smaller local abattoir gave them confidence they would get back meat from their own animals – an important consideration for businesses trading on quality. John Sherrell, who farms near Totnes, Devon, explained that during the foot-and-mouth outbreak in 2001 **'the local abattoir couldn't take the animals so we sent them to an industrial abattoir in Cornwall – when we got it back we didn't even know if it was our beef or not.'**

Smaller abattoirs also play a vital role in dealing with non-standard livestock including horned cattle, deer, bison and traditional, native and rare breeds as well as organic. Traditional native breeds in particular graze meadows, pastureland and heaths, including nature reserves and SSSIs – essential for biodiversity and landscape conservation. These animals mature more slowly and do not readily fit supermarket models: the local meat sector gives them an economic value, while outlets benefit from distinctive, high-quality local meat.[155]

Challenges and barriers

There is a mutual dependence between the local meat sector, supporting infrastructure such as abattoirs, the farming sector (particularly the small and traditional livestock sectors) and the landscape and habitats they help to manage. Yet, as food retail continues to consolidate, there is pressure for the infrastructure that services it to do the same to achieve greater economies of scale. It is important for the survival of local meat outlets and smaller livestock farms which supply them that smaller local abattoirs survive.



Context

In the early 1960s there were over 2,300 abattoirs in England, with many smaller plants serving local butchers via local livestock markets. By the 1990s this number had fallen to 660. A number of factors have contributed, including development of the motorway network, more stringent EU regulation and restructuring of the retail sector. Better road transport has enabled larger 'livestock agri-business centres' to develop, leading to the closure of smaller livestock markets. Also highly significant is the concentration of retail trade at supermarkets and the scaling up and concentration of businesses serving them. In the early 1960s traditional butchers' shops accounted for 97% of retail meat sales but by 1990 supermarkets had over 40% of the market in beef, veal and pork.[156] The number of butchers' shops has declined dramatically, from over 40,000 in the early 1960s to as few as 6,500 today.[157]

Key issues

Small abattoirs have disappeared and are threatened by further concentration of retail and disappearance of butchers. Without local abattoirs, the local meat sector and the smaller and traditional livestock farmers who depend on it would struggle to survive. Smaller local abattoirs reduce the stressful transport of livestock and can handle non-standard livestock, which maintains diversity in meat production and animal genetic stock.

Recommendations for action

Government needs to support access to local abattoirs and ensure small and medium-sized abattoirs do not face disproportionate inspection costs.

Local planning authorities should give support and protection to assets and infrastructure vital to local food supply including local (smaller-scale) abattoirs.

Parking and signage

Key findings

Attributes and benefits

A few comments confirmed the importance of location to business success, mentioning that convenient access for customers boosted sales. Shopper surveys indicate that convenience is a major draw of out-of-town/edge-of-town shopping where free parking is usually provided.

Challenges and barriers

Many comments mentioned problems relating to parking and signage. Businesses mentioned the negative impact of lack of parking and car access to town centres, increased parking charges and parking restrictions. Poor signage may affect the popularity of markets, while some outlets and producers in the countryside mentioned the difficulty in getting permission to put up signs.

Key issues

Town centres face significant problems in continuing to attract shoppers when the alternative for an increasingly mobile population is to visit an out-of-town retail centre with easy and ample car parking, usually free. Town centre parking is also being lost to development (including the building of supermarkets), reducing the supply. Parking charges and restrictions can be another disincentive to town centre shopping.

Car-centric shopping has brought increased congestion, pollution and noise. In contrast, town centres provide opportunities for linked shopping trips, accessible to most people through sustainable travel choices (walking, cycling, public transport). If out-of-town shopping displaces local shops, it leaves people with less choice and access to food, especially older people or non-car users.

Food shopping presents a particular problem. Public transport may not be a viable option for carrying a large amount of food shopping home. But if stores in walking distance have disappeared and parking provision in

Case study: The new local abattoir – CS Meats

Abattoir and butchery CS Meats was set up in 2004 in Sherborne, Somerset by Charlie Goodland, a registered animal welfare officer.

They pride themselves on humane slaughtering and specialise in smallholders and small farmers rather than large contracts. 'Here we serve each producer privately and directly. They know what they get back is theirs and that the animals are respected and well treated,' says Charlie. As well as cattle, pigs and sheep, the slaughterhouse is licensed for bison, water buffalo, farmed deer, goats and wild boar, and holds organic and Freedom Foods accreditation.

town centres is poor, then shoppers may feel they have little choice but to shop out of town.

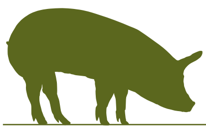
Recommendations for action

Local authorities need to make it easy for shoppers to use the town centre for food and other shopping by:

- improving the quality of the street environment so people want to spend more time there as well as walking and cycling routes to it
- ensuring there is frequent, regular, comfortable and affordable public transport, which is well publicised and promoted
- levelling the playing field between town-centre shops and out-of-centre supermarkets/stores, such as by ensuring adequate parking provision[158] and introducing schemes to reduce charges for off-peak parking as recommended in the Portas Review.[159]

Businesses should work with local authorities to develop:

- home-delivery schemes and cycle-trailer loan for bulky shopping to enable shoppers to use sustainable transport choices for their main shop in the centre
- a loyalty card scheme to incentivise local shopping trips that can be done on foot, by bicycle or public transport and offers discounts on parking costs.



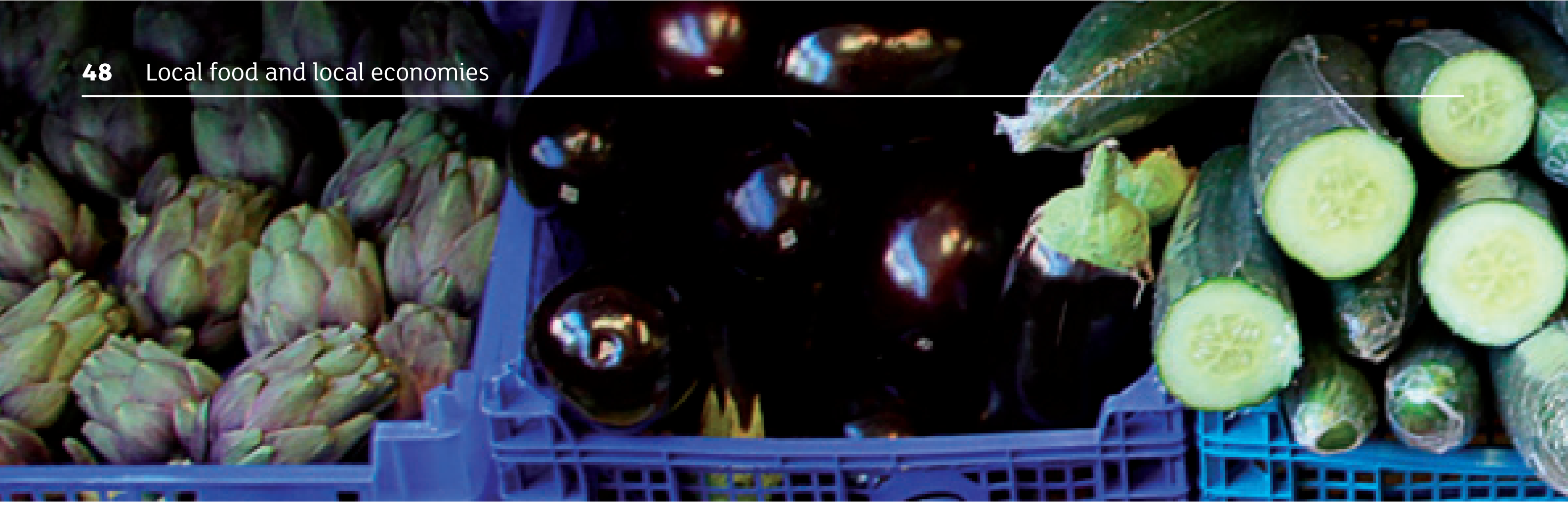
Without local abattoirs, the local meat sector and the smaller and traditional livestock farmers who depend on it would struggle to survive

Case study: Ely: trade, traffic and transport

Traffic is a significant problem for Ely, with its historic and heavily touristed centre. Congestion is set to worsen as the city grows.

The district council is working with Cambridgeshire County Council to develop sustainable transport strategies, but other policies could undermine their effectiveness. For example, a southern bypass for the town is offered as a solution to traffic congestion, but there are plans to fund it via an out-of-town retail development. This risks diverting more trade from the city centre and, perversely, increasing car use. A 2007 survey[160] provides evidence that out-of-town shops mean more car use: significantly more shoppers use their cars to get to the out-of-town Tesco superstore (96%) than shops in the city centre, such as Waitrose (64%) and Ely market (46%). According to the Association of Convenience Stores, section 106 agreement funds are also being used to subsidise a bus service to take shoppers out of town, which could further damage the centre.[161]

The Council's Local Transport Plan looks to manage parking demand and encourage use of more sustainable modes of transport, such as walking, cycling or public transport. However, new charges for parking in the city centre have generated strong opposition. The conundrum is that this policy gives supermarkets, most of which provide free parking, an advantage over independent local food shops, and so it may encourage more car use not less. To strike a balance, the council could explore other options including reinstating free parking at restricted times, such as market days, weekends or late afternoons as Portas suggests.[162]



Access to markets

Key findings

Attributes and benefits

Though we received relatively few comments on this theme, it clearly emerged that:

- the local food market in general is an important outlet or the only way to go: **'[The] farm is not big enough to sell to supermarkets – local market is the only option'** and **'Farmers' markets are a viable economic model for small farms to access the market, especially if you cannot get your product into shops.'**
- local street, covered or farmers' markets give small businesses affordable access to customers: one Haslemere baker identified the local market as an opportunity **'to sell in a prominent county town without the overhead of a permanent shop'**. Country Markets notably offer a supportive, low-cost entry point for people new to food production.

Challenges and barriers

Producers are restricted by a lack of outlets: one in ten producers confirmed this. Some pinpointed a pattern of decline and the challenge of the supermarkets. This was so for Ely, a relatively small local food web, but also where the web was thriving:

- **'Many outlets [are] failing every year. In the last 20 years changes occurred. [We] used to supply five outlets in Cambridge, since reduced to two, used to have three market traders, now only one.'**
- **'There's less outlets. They close and don't open up again. Supermarkets are taking their trade. They pick an industry and destroy it. There are less people producing, less people selling it. Local fruit and veg shops have closed, stalls have closed.'** (Ely traders)
- **'[We need] more outlets – the number of outlets is reducing over time – 75% reduction over 10 years.'** (Burnley trader)

Traders in many locations wanted markets, particularly farmers' markets, to be more frequent: **'regular markets every week, rather than just monthly.'** Some towns wanted markets to be sited more prominently – **'in or near the retail centre with access to footfall'** (Ely) or **'in the market square'** (Shrewsbury). Market squares do not always function as such, and markets can often be hidden away (Knutsford).

In Hexham, a town with a large rural hinterland but sparse population, a high proportion of local producers said the local food market was too small. In similar rural and sparsely populated counties, the population may not be able to consume the amount of food produced locally unless the popularity of local food increases.

Key issues

Smaller producers have lost many traditional routes to market. Businesses can struggle to grow as their market shrinks, particularly if they are unable or unwilling to meet the demands of large retailers. Local food markets open up opportunities for entrepreneurs, but their scale can be limiting for larger businesses – particularly in sparsely populated rural areas. The challenge is to grow the local market so it can support and satisfy the needs of smaller companies and act as a launch point for new businesses.

Recommendations for action

Local authorities and other market organisers should support more frequent farmers' markets – weekly or fortnightly – and ensure they are well promoted and sited – e.g. in market squares and traditional market halls.

Public procurement is an important potential market for local food. Local public bodies should take into account the new Public Services (Social Value) Act 2012 which requires local authorities, when entering into public procurement contracts, to give greater consideration to economic, social or environmental well-being during the pre-procurement stage. Local public procurement officers can increase opportunities for local producers to bid for contracts by:

- setting criteria for the freshness, seasonality and frequency of delivery of produce
- training staff on how to get the best from catering contracts
- splitting larger contracts into suitable size lots
- advertising to local producers through the competitive tendering process.[163]

Traders in many locations wanted markets, particularly farmers' markets, to be more frequent

Local food and local communities

Shopper attitudes to local food

Key findings

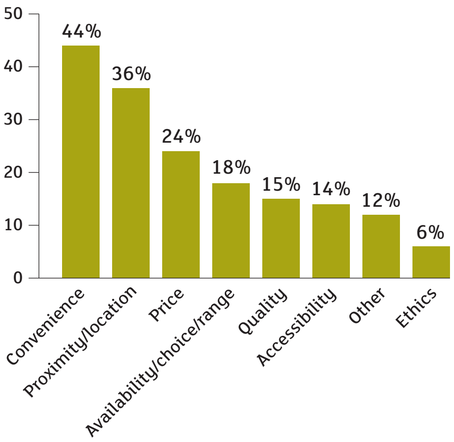
Shoppers in every location were interviewed by local volunteers using a standardised questionnaire, revised after pilot surveys in six locations. Where questions used in pilots remain, findings are reported for all 19 survey locations. Where questions were altered, only answers from 12 or 13 main locations are reported. We list the number of shoppers answering any given question as N (e.g. N=440). For further information on the survey process, sampling and analysis see the research process report at **www.cpre.org.uk.**

Main findings of shopper survey

Where do you do your main food shops and why?

- Supermarkets dominate grocery spend, accounting for 77% of all main shopping trips (based on open responses by 1,500+ shoppers in 13 locations)

Main reasons given for shopping at supermarkets
(Based on open responses;
N = 870+ shoppers in 13 locations)

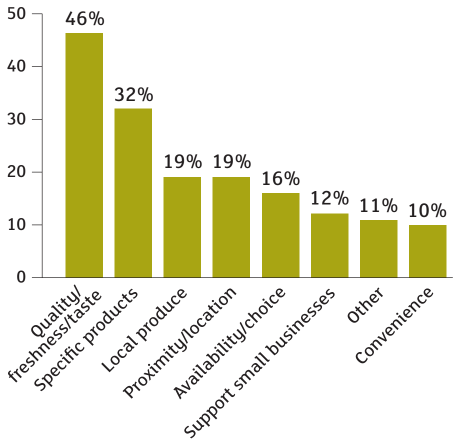


These figures reflect national trends of high supermarket use, but also show nearly a quarter of shoppers sampled rely on other shops for their main shop. Convenience is key, including being able to shop under one roof and saving time. The 'other' category includes a general preference for supermarkets, habit, lack of alternative or familiarity, as well as loyalty cards, staff discounts, quality of service, cleanliness and pleasantness of shop. There is a high degree of consistency in these figures across all locations.

Where do you do any extra shopping for food and why?

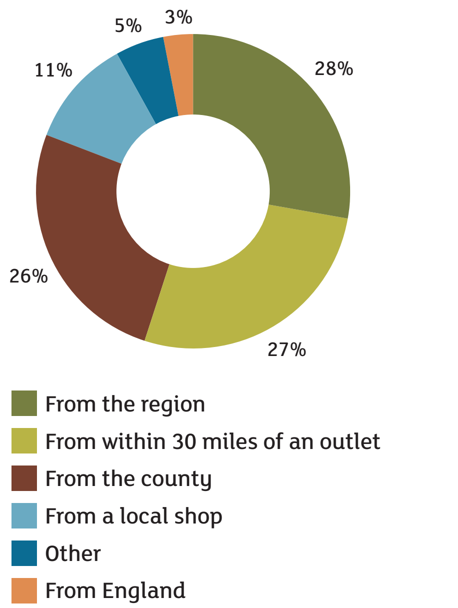
- Over a fifth of shoppers sampled used independent stores for all or part of their main shopping. Around 60% of extra shopping trips were to local independent stores and markets, suggesting that they form an important part of the retail mix (based on open responses by 1,200+ shoppers from main locations only).

Main reasons given for shopping at independent stores
(Based on open responses;
N = 440+ shoppers in 12 main locations)



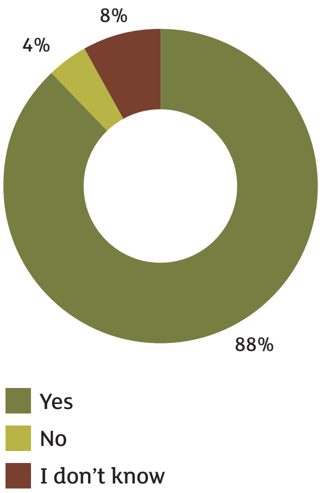
While convenience in general and a nearby location in particular remain relevant, many shoppers using independents show a marked interest in the quality of food and a range of issues related to choice, including specific and local products. The 'other' category includes friendliness of staff, relationship with owners and environmental reasons, including reducing food miles.

What do you understand by the term local food?
(based on closed responses;
N = 1,150 shoppers in 12 main locations)

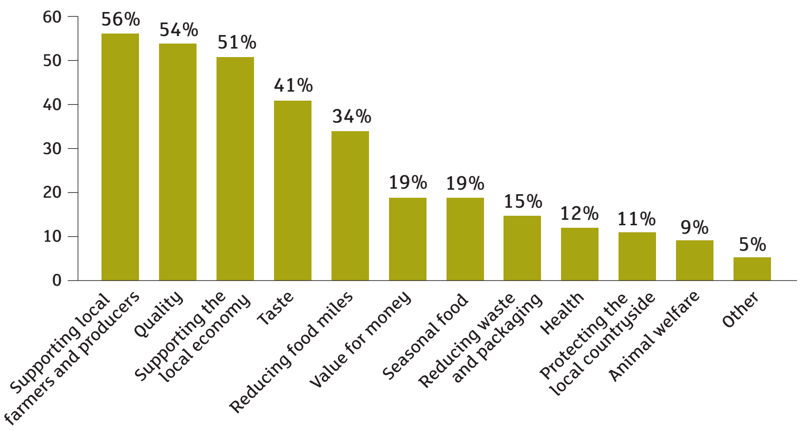


A large majority of shoppers defined local food to be from within the region (28%) or closer (53%). No distinctive trends emerged as to why the percentage choosing different definitions varied across the country. Some locations may reflect a stronger regional identity such as Norwich (42%) and Ely (40%) in East Anglia or Darlington (58%) in the North East – though for regional neighbour Hexham this sank to 30%.

Do you buy local food?
(based on local as produced within 30 miles of the store)
(based on closed responses; N = 1,900 shoppers in all 19 locations)



If you buy local food what are the three main reasons you choose to buy it?
(based on closed responses; N = 1,300 shoppers in 12 main locations, when asked to select their three most important reasons from the options listed)



The overwhelming majority of shoppers said they buy local produce, although they were not asked how frequently. This seems to conflict with recent estimates such as the IGD's, which suggest around 43% of people bought local produce in 2011.[164] There could be several reasons for this difference. It could suggest a selection bias in our shoppers, although efforts were made to survey at sites across locations to minimise this risk. It may be the case that giving shoppers a clear definition as used in the project made it easier to answer 'yes'. Finally, shoppers may perceive local food to be good so answer as they think they should.

Responses reflect a wide range of social, personal and ethical reasons. The results are comparable to industry estimates such as the IGD's: '52% of shoppers claimed to purchase local products in order to support local producers, a quarter (25%) to support local retailers, and over a fifth (22%) to keep jobs in their area... Supporting local/British producers has now become the most important ethical criterion for shoppers (48%) when it comes to choosing grocery products.'[165] Value for money features strongly. A broad range of environmental reasons (food miles, seasonality, waste, countryside) accounts for over 1,000 responses.

56%

Percentage of shoppers purchasing local products to support producers

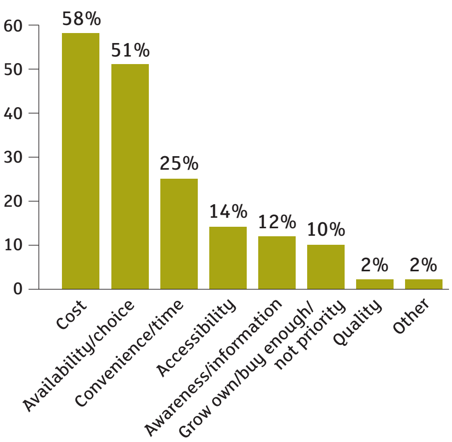
4 IN 10

Proportion of shoppers prepared to pay more for local food

54%

Percentage of shoppers who buy local food for its quality

Why don't you buy more local food?
(based on open responses;
N = 800 shoppers in 13 main locations)



Price and limited range of local produce are major deterrents to shoppers buying more. The number of shoppers citing price indicates that local produce is generally seen to be or is more expensive. However, a recent IGD survey suggests 'more than four in ten (42%) of shoppers claim they are prepared to pay extra for locally produced foods, increasing from 38% since December of last year.'[166] Local food may not be seen to be cheap, but, for reasons of quality and ethics, many shoppers see it as good value for money.

Many shoppers said local produce was not readily available, with very few outlets stocking it except farm shops and farmers' markets. Shoppers also cited the difficulties of seeking out local produce in places where they did most of their shopping – generally supermarkets – or getting to shops that stocked it, such as parking problems and inconvenient opening hours. It is difficult to distinguish in responses between genuinely poor availability in the area or poor awareness among shoppers of where to find local produce – those who do most of their shopping in supermarkets, for example, may come across very little local food.

Explicit references to access, opening hours, having to travel far and parking problems were classed under accessibility, but these overlap with convenience. Some shoppers are put off by needing to shop in many small stores, making multiple trips and lack of time.

How much do you spend on food and how much on local food per week?
(based on open responses; N = 780 shoppers in 12 main locations who answered both questions)
Regression analysis was used to test for a correlation between household incomes and percentage of food spend on local produce, based on a sample of 600 shoppers who also disclosed their incomes.

- The shoppers who answered both questions spent on average around £22, or just under a third of their weekly food budget (£71), on local produce.
- Shoppers across all income bands in the locations surveyed buy local food, suggesting that it is not a preserve of the better off. Regression analysis showed no significant relationship between the percentage of the weekly shopping spent on local food and household income.

The average spend of a third of household food spending appears high given national data on grocery spending. There may be a selection bias towards shoppers who buy local in the main sample. Many shoppers not answering were excluded from the sample, which may skew figures upwards: it is easier too for shoppers who actively seek out local produce to work out what they spend in particular outlets such as farmers' markets or local butchers than to calculate how much local food they buy in a large weekly supermarket shop. Nevertheless, this data suggests that many shoppers across 12 locations sampled – potentially committed ones – do successfully buy around 30% of their food from local producers.

Interaction – business to customer

Key findings

The information under this theme was elicited from businesses interviewed mainly when asked: *Why do customers use the business?*' and *'What are the advantages of selling local food?'* Over 300 comments reflect the relatively high importance of this theme. There was an overwhelmingly positive response from outlets and suppliers, with only three negative comments recorded.

Attributes and benefits
The main benefits mentioned are different for outlets and producers. Across smaller outlets there were three key benefits to selling local food:

- Many comments show the importance of good customer service in the success of local food businesses. This is something they value and achieve, with a focus on friendly staff building good personal relationships with customers through direct contact. There were examples of exceptional customer service, such as a sausage maker producing gluten-free sausages for one customer. **'Customer service [is] very important – [we] will find or make products to customer specifications'** (Burnley trader). Staff are likely to be more knowledgeable about the products they sell in specialist shops than in supermarkets, often because they

know the producers in the local supply chain.

- The importance of staff and customers being able to have a chat and get to know each other is also mentioned frequently: '**People get to know us here and we get to know them,' 'We know people and they come in for a natter,' '[We] provide an alternative shopping environment – more sociable, more personal, familiar.'**
- These are all related to creating a friendly and enjoyable atmosphere in the shop which encourages customers to come back: **'regular customers come here because they like the people – they come here to see the people'** (Totnes outlet).

Customer interaction was also seen as important by suppliers in business-to-business transactions:

- Customer service is very important to suppliers, and they appreciate the value of this in the local supply chain.
- Businesses felt local supply enabled them to provide a better service.
- Service is built through direct contact with customers, so developing personal relations. Importantly, it is easier for customers to give feedback: direct, immediate, honest feedback was frequently mentioned as enabling producers to provide a better service. **'When you do something wrong the customers tell you and so the quality increases,'** said one Ely trader. **'This is only possible because the consumer and producer are in direct contact.'**

Challenges and barriers

There were very few negative comments on this theme. We might conjecture, though, that personal contact can be double-edged. The success of a smaller business may depend on key members of staff: not only their efficient work but their personality, sense of humour and moods. They can stand or fall by whether staff make the shopping experience congenial. Larger food stores are less obviously reliant on the way individuals interact with customers and so can offer a consistent, if less personal, service, while the advent of self-check-out machines offers shopping without human interaction.

Key issues

Direct contact between staff and customers is a valuable aspect of what smaller businesses do and one which contributes to their success. There are likely to be wider benefits too:

- The social interaction stores offer may be an important form of personal contact for those who live alone and may suffer isolation, especially the elderly; the need to shop for food regularly and frequently means this contact can be an important part of being connected in a community.
- Chatting or interaction is part of building community: social contact builds trust which can feed into wider forms of co-operation and mutual support.
- Personal, friendly contact creates the opportunity for customers to put in special requests or to give feedback, which can help businesses improve their service and be responsive.
- Local food may be relevant to fostering conversation in the first place as other comments suggests customers ask about provenance, how food is produced or how to cook it; the distinctiveness of local food presents an ideal opportunity to converse and give advice or recommendations about the food itself. Also, personal contact offers an opportunity for shopkeepers to recommend customers try something different: **'At a greengrocers people will try different varieties because somebody serves them [or] suggests they try it'** (Ely producer).

We might conjecture, too, that personal contact with staff who in turn know local producers brings shoppers closer to where their food comes from and builds trust. As one Ely trader put it: **'Our customers know us and so they trust the product – [it] leads to loyalty.'** We might also expect this connection to reinforce the values which shape people's shopping habits and their willingness to buy for reasons other than price. Because they are connected to it through more than a brand name – and there are fewer degrees of separation than in long supply chains – shoppers may care more about where their food comes from and how it is produced.

Research into social benefits of small stores

Shopping is an inherently social process, and small stores play a vital role. Research confirms the important role of small local shops as social centres or hubs which are critical to community life.[167,168] This role as a meeting place can reinforce a shared sense of togetherness. The friendliness of small shops where local customers are recognised and greeted can develop a sense of belonging which contributes to well-being.[169]

Much of the evidence is collated by Clarke and Bunga who reviewed the economic and social role of small stores.[170] They cite various studies which show the role of such stores in building relationships through familiarity, creating 'emotional connections' in a friendly environment and, through their social function, meeting a variety of needs including

Small local shops are critical to community life

those of disadvantaged groups: the elderly, socially excluded, financially deprived, and less mobile.[171] Studies show that small shops can foster a sense of security, reduce isolation and support the independence of shoppers.

They also meet the needs of consumers by adapting to the local population and tailoring their product ranges. This tailoring of stock and the services they offer can also generate customer loyalty and a shared sense of culture, a sense that this is 'our' shop.[172] Conversely, the closure of small community shops leads to a reduction in social contact.[173]

Informal support to the community

Key findings

There were more than 250 comments about how businesses contribute to the community, especially from outlets.

Attributes and benefits

Deliveries

Numerous outlets provide delivery services, particularly to the elderly, disabled and less mobile. These services are often free or come at a cost to the business:

- **'Some of my customers are elderly and disabled and would find it very difficult to get to a shop. I deliver to them.'** (Norwich business)
- **'We have many elderly customers that have been shopping with us for years and they often ask us to bring them things when they cannot get out – which we do with pleasure no matter how small an order.'** (Sheffield trader)
- **'We don't oversell this service as it's a massive cost. If it's one of our "old dears" we do it for free. I haven't got the heart to charge them.'** (Hastings trader)
- **'We do not have a formal delivery service but a local member of staff regularly delivers to our customers on the way home.'** (Knutsford trader)

For some, deliveries are an extension of other community support: **'[We] often provide informal support, help out regular customers with problems, sometimes home visits, help carry heavy shopping. [We] serve as the hub of the community in many ways and offer first aid'** (Sheffield trader).

Supporting local good causes, community events and organisations

Across the range of locations very high proportions, often all, of the businesses interviewed offer cash and in-kind support for community initiatives, events and organisations. The range of events and organisations is wide: the Brownies, care homes, charity auctions, classes, community centres, fêtes and festivals, fundraising for hospitals, hospices and charities, local campaigns, Neighbourhood Watch, sports clubs, talks, village in bloom competitions. The type of support includes running stalls, advertising, donations in cash and produce, organising events and classes, and providing venues and facilities. While it is difficult to quantify such support, the responses clearly show how deeply embedded many local food businesses are within their communities.

Challenges and barriers

All comments bar one were positive under this theme. Surveys didn't investigate how well businesses advertised delivery services or how they generally support their communities, and this may go under-recognised. Larger corporate businesses have recognised corporate social responsibility functions which promote their charitable activities and community support. Smaller local businesses, which have been doing this for years, could do more to reinforce the message that they serve their local communities.

Key issues

Delivery services have existed for many years and are not restricted to smaller shops. Supermarket deliveries and box schemes are widespread and widely advertised, and can be convenient for busy households. However, smaller shops can offer a more personalised service and take orders for deliveries by phone or in person in ways that the major chains do not – vital for those who don't use the internet.

The motivation for small food shops offering deliveries is a mixture of good business sense (offering customers a better service, boosting loyalty and custom) and altruism and goodwill towards loyal customers. For smaller businesses, the cost in time and effort may be disproportionate to the returns. Delivery services are valuable for food shops, especially those selling more raw food – meat, dairy, fish, fruit and veg – which is bulky and heavy. As we have seen, these shops tend to sell high proportions of local food.

A significant aspect of the informal support offered is the relationship with personal service. Helping people carry shopping to their car, home and hospital visits, keeping items back for customers who ask for them, personal and informal delivery services: these are likely to depend on personal connections built up over time.

Education and training

Key findings

Over 150 comments, overwhelmingly positive, came in response to questions about how businesses support or strengthen the local community. Producers in particular offered opportunities for people to learn about how food is produced.

Attributes and benefits

A third of comments relate to outlets and producers educating young people about food, farming, healthy eating, seasonality, growing their own vegetables and home cooking in various ways, such as:

- talks to schools and school groups
- local school visits to farms and shops
- open farm days and tours.

Examples abound. An Ely trader cited **'school tours to the farm, which has a positive impact because it teaches kids about where their food comes from'**. The owner of a Totnes business **'spends several hours a week teaching kids how to grow veg at the local school.'** A Sheffield enterprise works **'with Sure Start to help children learn about eating well'** and with people with special needs and learning disabilities. One Hastings business taught 2,500 children to make cheese through a 'connect with the countryside' schools event. Other examples of educating and engaging with the public included:

- talks and demonstrations
- open days and visits
- volunteering and work experience
- classes, courses and other forms of learning in areas such as cookery, chocolate making, planting, pig and chicken keeping, cider making, organic growing and milling.

Case study: Farm-to-school and Food for Life

In the US, the Department of Agriculture (USDA) began pilot farm-to-school programmes in the late 1990s.

By 2010, there were more than 2,000 such programmes across 50 states.[174] These can be described as 'efforts to serve regionally and locally produced food in school cafeterias'.[175] Successful programmes vary widely and can come from farmers themselves, schools, parents or the wider community.[176] The objectives are to improve nutrition for school children by serving healthy meals but also to give children the opportunity to learn about how food is produced and, using local produce from local farms, to experience fresh fruit and vegetables in the classroom.

In the UK the Food for Life Partnership has worked over five years to make food a core of the curriculum. Over 4,250 schools enrolled on the programme are adding to children's experience of food through farm visits, cooking and growing. Over 450,000 children are eating Food for Life Catering Mark accredited meals using freshly prepared, locally sourced ingredients.

Key issues

This theme raises some important issues about the relevance of local food webs to food and farming education. Larger integrated food businesses – agri-businesses – don't preclude school visits or open days. But with fewer, larger farms, informal or family contact with a local farm is less and less likely. In contrast, the presence of local food supply chains means more farms and a greater diversity of farm types around to educate people both informally and more formally, as in the examples above.

Educational activities can be a useful promotional tool for producers selling directly to the public. Local food webs offer other advantages for food and farming education:

- smaller local food businesses may be naturally closer to their local communities and more familiar and approachable as they supply local outlets, have more connections through family and friends or sell from the farm
- micro and small businesses, possibly using artisanal methods of production or raising a variety of livestock, are likely to be more understandable and appealing to children (and adults) than specialised, industrial-scale agri-businesses.

Recommendations for action

Communities, schools and local farmers should work with the Food for Life Partnership to build links between food served in school cafeterias and local producers. This could enable children to increase their intake of fruit and vegetables and learn about how food is produced. Local farmers could build relationships with local schools and offer farm visits to develop children's knowledge about farming, food production and the links between what they eat and their local countryside.

Local food and the local environment

The quality and character of town and countryside

Key findings

Over 300 comments were generated by questions about how businesses supported the character of the area or vice-versa, and how the businesses were working to reduce their environmental impact.

Attributes and benefits

Businesses commented significantly on three main roles of their businesses:

- supporting the quality and character of their town
- supporting the quality and character of the surrounding landscape
- maintaining historic and listed buildings in use.

Outlets

Around half of all comments refer to how they contribute to local character, particularly of market towns, and attract trade, including tourists. This is particularly true for markets:

- **'Local food produce selling in a market town enhances the feel of the town'** (Newark trader)
- **'[It] preserves the idea of Haslemere as a town with individual shops rather than chains'** (Haslemere trader)
- **'The business attracts tourists who then shop in other outlets or eat in cafés and restaurants during their trip'** (Hexham business)
- **'We're a piece in the jigsaw. [There are] more people in town on market day than any other day. It brings people in.'** (Ely trader)

A significant number of outlets (69) – some of these were also producers themselves – mentioned their role in supporting farmers in managing and protecting the local countryside:

- **'Many dairy farms have closed so we feel it's important to keep the cows grazing and the cheese-making alive'** (Yeovil business)
- **'Buying meat from local farmers, for example supporting traditional upland farmers'** (Hexham trader)
- **'Selling products that protect a particular landscape'** (Penrith business).

A fifth of outlets referred to their role in maintaining historic or listed buildings: there were numerous mentions of **'keeping an important building in use'**, supporting the heritage and historic character of towns large and small.

Producers

Producers made similar comments but, being mainly in rural areas, they focused on maintaining the quality and character of the countryside through land management and more specific initiatives such as agri-environmental schemes (Environmental Stewardship). Benefits included:

- keeping traditional listed farm buildings in use, especially through production-related diversification
- maintaining field boundaries – hedgerows, stone walls and fences
- using buffer strips, conservation headlands on arable fields and vegetation to protect water courses
- maintaining permanent pasture for grazing
- retaining 'traditional' farming methods.

Challenges and barriers

Although some of the environmental initiatives mentioned are required for payments from the Common Agricultural Policy and other schemes, we believe there is a strong connection between local food production and more diverse and sensitively managed landscapes and countryside. Outlets and producers could do far more to advertise this.

Key issues

There are two main issues above. Firstly, there is the role of smaller local outlets in supporting the fabric of a town. This role is linked to scale and character of the store. Older town centres typically have older building stock which can house smaller outlets. Local independent traders keep such outlets in sensitive use, and bring in footfall and trade generally. Local food outlets can both offer local access to basic foodstuffs and offer something different to visitors and tourists. National chains with heavily branded shop fronts can damage town centre character particularly in historic towns. Too many national chains can create the feel of a 'clone town', undermining its attractiveness to shoppers and visitors. Chains, especially supermarkets, may also want to operate from larger stores, which may not fit into historic centres. Pressure to re-develop or build further out can threaten the retail health of the whole centre.

Secondly, local food webs underpin diversity in the farming system by supporting direct selling or short supply chains and diversification into processing and retail. Both of these offer a better return to producers. This has important ramifications, most notably retaining diversity in scale, production, genetics and land management in the farming system by:

- enabling small and medium-sized producers to survive without scaling up to compete in commodity markets
- supporting diversity in crops locally as there is a market for a wider range of produce and less pressure to specialise to survive
- adding value to traditional methods of

1,710

The number of producers we identified supplying food from within 30 miles

23%

Driving to the shops' contribution to the greenhouse emissions of food transport

land and livestock management; this means producers can resist the pressure to intensify and industrialise production, which could damage habitats and landscape features, and can keep fields small, retaining more hedgerows
- avoiding loss of farmsteads to non-farming uses and shrinking of future food production capacity
- providing markets for crop varieties and livestock breeds less suited to mass retail because they do not fit standardised systems or long-distance transport or aesthetic criteria. These often taste better and may be more nutritious. Research shows that grass-fed beef – usually from traditional breeds raised to finish on grass – is richer in the long-chain fatty acids we need;[177] heritage apple varieties such as Egremont russet contain up to 10 times more nutrients than modern cultivars.[178] They may be locally distinctive or unique, lending a strong sense of place to the area, and support important habitats, such as wildlife-rich traditional orchards, upland pastures and meadows.

Recommendations for action

The Government should target future rural development funding under Pillar II of the Common Agricultural Policy towards schemes across England to support high standards of environmental management and conservation of special habitats linked to local food production and sourcing. These could target designated landscapes such as National Parks and AONBs, then be extended to national landscape character areas and habitat types.

Case study: The Peak District Environmental Quality Mark[179]

The Environmental Quality Mark (EQM) is a certification scheme which aims to help protect the Peak District National Park by building a sustainable supply chain.

The first of its kind in England, it has grown to over 90 businesses in four categories including Farming and Food and Drink Producers. The scheme is free to join and was designed to be replicable elsewhere, especially in Areas of Outstanding Natural Beauty and National Parks.

To qualify, businesses must demonstrate high standards of environmental management and high quality care of the National Park's special environment. Categories assessed include: conservation of the National Park; use of locally grown and made products and services; efficient use of energy and water; minimization of waste; and providing environmental information to customers. Auditing ensures continued compliance.

The EQM aims to draw on local distinctiveness and provides a business incentive for conserving special Peak District habitats. For example, conservation standards tackle loss of wildflower-rich hay meadows by requiring land managers to keep 10% of their holding in good conservation condition. Similar rules apply to woodland, moorland and care of historic and landscape features such as dry stone walls. Certified producers or retailers must also use their purchasing power to support EQM-certified farmers.

Food miles and environmental impact

Key findings

Attributes and benefits

The SAFE Alliance's Food Miles Report (1994) first set out the concept of 'food miles' and makes clear that it 'isn't just about distances' but 'some of the wider social and ecological implications of international food trade'.[180] Yet it has generally come to be understood more narrowly to mean the distance food is transported from producer to consumer and the environmental impact of that transport.

Outlets and suppliers across many survey locations cited reducing food miles as a key advantage of trading in local food. The research identified 1,710 producers in 19 locations (an average of 90 per location) supplying into towns and cities from within 30 miles – and often closer. Food miles also resonated with the public we interviewed: over a third of shoppers gave it as one of three main reasons they bought local food (34% of 1,200 shoppers). This is in addition to the many who did so to support local businesses – an integral part of the original food miles concept.

Challenges and barriers

The food miles concept has sometimes been a lightning rod for attacks on the concept of local food. Critics point out that international trade can help smallholder farmers in poorer countries improve their standard of living[181], that

transport is only a small portion of the total energy use for food production, and that reducing meat and dairy consumption would have a more positive environmental impact than buying only local food.[182] Research by Manchester Business School is cited to challenge the environmental case for local food.[183] Using life cycle analysis (LCA) data on the environmental impacts of various food types, the authors conclude that the argument for a lower environmental impact of local food is weak and that 'global sourcing could actually be a better environmental option for particular foods'.[184] For example, tomatoes grown in Spain use less energy than those grown out of season in heated glasshouses in the UK: tomatoes, cucumbers, peppers grown all year round in hothouses cause disproportionately high CO_2 emissions.[185]

Context: The GHG impacts of food transport

The transport of food accounts for around 3.5% of the UK's total GHG emissions.[186] The importance of transport varies for food type and mode of transport. For example, for field-grown fruit and vegetables, transport emissions tend to be a significant part of the total, whereas for meat and dairy products the agricultural stage generates most emissions.[187] Air freight contributes a large proportion to total transport GHGs: the 1.5% of fruit and vegetables transported by air make up 40% of all fruit and vegetable transport emissions. While production methods can be improved and emissions reduced, development of clean transport fuels is still in its infancy.

Driving to shop for food plays a part too: cars contribute around a quarter of the total GHG emissions of food transport. Emissions due to shopping by car rose by 46% between 2002 and 2006.[188]

Key issues

How useful are food miles as a guide to food's environmental impact? To some extent, this depends upon the audience.

DEFRA has considered using food miles as an indicator of sustainable development.[189] For policy development a wider set of measures is surely needed to assess the sustainability of the food system. Carbon footprint labelling has progressed, but while measuring GHG emissions captures some impacts of energy use, it fails to address other environmental impacts of food on water use, pollution, waste, biodiversity and landscape.

To be widely acceptable, a measure needs to be broad, but to gather data across so many factors is a challenge. The Manchester study looked at LCA as a more comprehensive measure, but concluded that the data on environmental impacts is 'patchy': indeed, it did not identify a single published full LCA of a product that a UK consumer would buy.[190] Added to this, the debate needs to continue about which impacts are relevant: the Manchester study, for instance, does not consider congestion, noise, or the loss of soil and land for food growing to develop infrastructure to service global distribution (roads, ports, warehousing).

In fact, the Manchester research usefully suggests different conclusions for different audiences. For Government, it only finds weak evidence for 'a lower environmental impact of local preference in food supply and consumption', but a high perhaps unreasonable bar is set for this test of when 'all food types are considered'. For consumers, the example of tomatoes above is helpful. Seasonal food – for example lettuce field-grown in the summer in the UK – is less energy intensive than imported salad from Spain: it is out-of-season fruit and vegetables that require more energy to produce within the UK.[191] This is where local food scores well, since local and seasonal usually work hand in hand. Shoppers should choose seasonal *and* local where possible, with local food generally a good guide to seasonality.

Secondly, the researchers conclude that, though individuals shopping at, say, a neighbouring farm reduces transport, 'evidence to generalise this to the entire food transport system is not decisive'.[192] For shoppers, then, buying locally sourced food close to home makes sense, but for policy makers a higher evidence threshold is needed. Finally, because of the system complexities and the 'wide variation in the agricultural impacts of food grown in different parts of the world'[193] processors and supermarkets need to be more discriminating in selecting particular food types for their environmental impact.

Recommendations for action

Government should fund further research to develop an indicator for sustainable food.

Businesses and local authorities should encourage local shopping trips for locally sourced food and access to shops on foot, bike or public transport.

Businesses should promote food miles as the concept engages people in shopping to cut unnecessary transport of food.

Businesses should minimise the GHG emissions of local food deliveries by using the most sustainable fuels such as electricity from renewables or biodiesel from waste vegetable oil.

Shoppers should buy seasonal, local food as a simple way to reduce their own environmental footprint.

Local food and local planning policies

We analysed local plan policies for their potential to support local food webs in 15 locations, and extended the research further to identify examples of supportive policies at other local planning authorities.

Key findings

Strengths and opportunities
Policies with potential to support local food webs related to: town centre first (11 locations), farm shops (6), local food (5), agricultural land (5), markets (4), rural economy (3), green procurement (1), and change of use from retail (1). There are some exemplar policies in place, but plenty of scope for local authorities to broaden the range and depth of policies on local food. The wider review unearthed similar issues but with some good examples of policies on retail diversity, aspects of local food and support for street markets (less so for farmers' markets). All policies cited were adopted from 2007 to 2011.

Town centre first and retail diversity
While national policies PPS4 and now the NPFF support town centres by requiring sequential and impact tests, some local plan policies go further by:

(i) specifically supporting smaller-scale and independent outlets:
- 'Sites in Darwen will cater for a range of retailing including smaller-scale provision such as that operated by the independent sector.' (Blackburn with Darwen, CS12)
- 'Islington will retain the primacy of retail shops in the borough's town centres and shopping areas and actively promote independent retail. Major retail developments will be required to provide a good supply of smaller retail units to maintain and enhance the diversity of shops in the borough and opportunities for small businesses.' (Islington, CS14)

(ii) protecting shops that provide essential services:
- 'The vitality and viability of centres will be safeguarded and where appropriate enhanced by encouraging a diversity of uses and resisting the loss of shops where this would unacceptably harm the retail function, character of the centres or shopping provision in the centres. Shops that provide essential day-to-day needs for the local community such as baker, butcher, greengrocer, grocer, specialist ethnic food shop ... will be protected from changes of use away from retail.' (Hackney, CS13)
- 'To fulfil their role in providing vital day-to-day shopping facilities for local communities in both urban and rural areas, the retention and enhancement of Local Centres and corner shops will be supported.' (North Lincolnshire, CS14)

(iii) ensuring the scale and location of new retail developments suit the character of the area:
- 'The vitality and viability of all Town and District centres will be maintained and enhanced so they continue to act as the focus for a range of activities, including retail uses. Mixed-use schemes will be encouraged. In smaller settlements existing local services will be protected to support the sustainability of these communities. This will be achieved through requiring new retail developments to be located in the existing centres wherever possible and to be of an appropriate scale and character to reflect their role and function.' (Waveney, CS10)

(iv) including additional tests in sequential policies:
- 'Retail development will only be permitted where it is of a scale consistent with the catchment appropriate to a centre's position in the hierarchy' unless a need can be shown
- edge-of-centre sites must be 'easily accessible by pedestrians, cyclists and public transport from the surrounding catchment area and ... close to other facilities which will encourage linked trips and ... not separated from that centre by a major orbital traffic route' and should 'result in a net reduction in length of vehicular trips'. (Norwich, SH03)

Local food

(i) The strongest statement of policy on local food we found is by Shropshire Council:
- 'Shropshire Council will plan positively to develop and diversify the Shropshire economy, supporting enterprise, and seeking to deliver sustainable

economic growth. In rural areas the Council recognises the continued importance of farming for food production and supporting rural enterprise and diversification of the economy, in particular areas of economic activity associated with agricultural and farm diversification, forestry, green tourism and leisure, food and drink processing, and promotion of local food and supply chains.' (Shropshire CS13)
- 'Promoting connections between visitors and Shropshire's natural, cultural and historic environment, including through an enhanced value of local food.' (Shropshire CS16)

(ii) Other policies tend to focus on local food growing in urban or urban fringe areas, but nonetheless offer important ways to increase access to fresh healthy food:
- 'Support opportunities for healthy and active lifestyles through promoting and supporting local food-growing and urban agriculture' (Tower Hamlets SP03)
- 'The promotion of the urban fringe as part of the green network and encouraging opportunities for multi-functional uses such as new allotments and local food production.' (Brighton and Hove, SA4)
- Other examples include Leicester (Policy CS2: Green Infrastructure) which encourages new allotments for local food growing, and Islington (Policy CS15) to 'create a greener borough by supporting local food production through the protection of existing food growing sites'.

(iii) The New Forest National Park Association makes a useful reference to local foods in Policy CP4: 'Measures to reduce the National Park's overall environmental footprint include supporting local food production' which builds on support in the South East Regional Economic Strategy: one of the priorities for rural areas is to assist the food and farming sectors and support the development of premium local products and the land-based products supply chain.

Context: the National Planning Policy Framework (NPPF)

Local authorities have a 12 month transitional period to review and revise their local plans to take account of the new NPPF. This will be a significant challenge for resource-strapped local authorities but is also an opportunity to add policies to better support local food webs. Developing new local plan policies in relation to local food is urgent as:
- NPPF policies on retail diversity, individuality, markets and agricultural land take on greater importance in a much compressed body of planning policy
- the absence of detail in the NPPF means local plans should address the issues for their area more specifically
- retail diversity policies need to be strong to protect against unsuitable developments, and avoid drawn-out appeals and public inquiries
- strong policies supporting diverse retail and local food will be reflected at the community level in neighbourhood plans.

Weaknesses and threats

Despite examples of strong policies, local plans in most locations are not strong or comprehensive enough.

As well as the examples of good practice outlined above, there is scope for policies to support:
- the relationships between retail diversity and sales of local food, local food production, diversification and the health of the local rural economy
- the role local food can play in supporting urban and rural character and creating distinctive attractions for tourism
- the value of local food retail in providing markets for new and innovative food producers and processors and the stimulus this can provide to the local economy in jobs and growth.

Other supportive elements generally lacking in existing local plans are:
- ensuring development is of an appropriate scale and character for the location
- setting a locally specific threshold (such as 1,000m^2) above which new developments should be tested for their impact on the town centre
- support for development of new markets or improving existing ones
- extending impact testing to other local centres and the wider rural and local food economy
- defining food stores as 'essential local services' with proximity criteria for access for local residents
- restricting change of use from Class A1 (shops).

Recommendations for action

Local authorities updating their local plans in the light of the NPPF should add policies to support local food networks. See page 61 for further details.

Main recommendations

This section contains our main recommendations for the Government, local authorities, food retail businesses and local communities.

Recommendation 1

Government should re-examine the competition policy framework to better support retail diversity and entry to markets of new local food entrepreneurs

'We need a more sophisticated understanding of what a good deal for consumers is, looking simply beyond price-based considerations to include community well-being and long-term sustainability.' Mary Portas[195]

The Government should develop competition policy to reframe consumer interest beyond a narrow price-based approach. There needs to be an approach which defines fair competition clearly in a way that supports retail and producer diversity particularly in local markets. This should promote access to markets for new businesses and support the development of small and medium-sized businesses as engines of economic growth. This would help to deliver an economic framework that develops stronger and more diverse town centres in support of town centre policies in the NPPF. Such a policy base would strengthen local food webs, allowing them to respond to increasingly demanding pressures on farming and food production due to scarcity of resources and environmental limits.

The new policy should be reinforced by considering how legally enforceable controls could help avoid further market concentration in food supply and retailing in order to prevent further loss of diversity and remove barriers to entry to markets. It would apply nationally to prevent all food retailers above a set market share/size introducing or expanding large format stores. This would address one of the main recommendations of the Competition Commission in 2008 which called for the introduction of a local competitiveness test for planning permission. Introducing a wider competition test into planning control would extend this policy to prevent the proliferation of smaller format neighbourhood stores operated by the same single operator (see below).

Recommendation 2

Government should develop national planning policy guidance to provide stronger support for a sustainable food system

The Government should give due recognition in its approach to planning to the strategic importance of food. This should recognise its importance to community health and well-being, retail diversity, land use and management, economic development, transport, ecosystem functioning and the landscape. It should also recognise the supportive role planning can play in addressing the challenging economic, social and environmental issues which the food system presents and in shaping the development of a more sustainable food system 'from field to fork'. This would enable planning to address in an integrated way the relationship between what we buy and eat, and support for the retail, distribution and production systems that can provide wide access to healthy, sustainable food.

In the longer term, the NPPF should be revised to refer clearly to the importance of food within key policy sections including:

- recognising the strategic importance of retaining farm land for food production by the efficient re-use of land that has been previously developed (brownfield land)
- protecting the most fertile grades of land – best and most versatile – for strategic and local food production, save in exceptional circumstances
- prioritising farm diversification into the production, processing and, where it addresses local need, retail of local food which supports the rural economy, communities and countryside character[196]
- supporting access to local abattoirs and local and regional food distribution hubs (such as the Heart of England Fine Foods model).

Recommendation 3

Government should strengthen the ability of the planning system to ensure the vitality of town centres

National town centre planning policies should also be strengthened. This should enable local communities and their councils to plan for and achieve retail development of the right scale and location to support or revive town centres and enhance their character and diversity. This in turn would help to secure the future of the traditional stores and markets which sell high percentages of local food and are critical to thriving local food webs. New powers should ensure local people, through their councils, are able to reject development which is inconsistent with a local plan and which would undermine local access and the role of town

centres as the 'heart of their communities'.[197] This should enable the achievement of the Government's aspiration that 'local people and their accountable councils' should 'reflect the needs and priorities of their communities' and for planning to 'be genuinely plan-led, empowering local people to shape their surroundings'.[198]

In the longer term, the NPPF should be revised to enable local authorities to set conditions on the location, scale and accessibility of retail as well as to restrict the dominance of particular operators in local market areas by:

- setting limits on total gross retail floorspace need proportionate to the size of town[199]
- re-introducing a strong 'quantitative' test of need for new retail floorspace above a locally determined threshold, with new floorspace permitted only in exceptional circumstances and usually for re-development
- setting maximum sizes for new floorspace of shops selling day-to-day essentials ('convenience' goods) including food and explicitly excluding format requirements as a basis for policy exceptions
- requiring local authorities to show how they will promote diversity in designated retail areas
- requiring retail formats to be adapted to enable re-use of existing retail and storage buildings to support town centres
- incorporating a local competitiveness test via a policy presumption that any new small or medium-sized food store would require planning permission.[200] This should operate to ensure that no net addition to that operator's presence in the market area would be allowed where its market share already exceeded a locally determined threshold.

Recommendation 4

Government should provide strong leadership on sustainable food procurement

The Government should set challenging long-term targets for central government food procurement to increase food from sustainable sources. This would:

- raise public awareness of sustainable food
- set an example for other public bodies (including prisons, schools and the NHS)
- help to develop a supply base
- help form relationships between caterers and local producers
- harness billions of pounds of public expenditure to support sustainable fresh, seasonal and local production.

EU regulations prevent giving preference to a supplier on the basis of location or distance but the Government may legitimately set requirements for freshness, frequency of deliveries and production standards, including organic. These could support smaller local producers. Targets could follow the Dutch Government example for catering services by setting sustainability targets by a specified date. Under this approach suppliers must meet sustainability criteria, for example relating to caught and farmed fish, free-range livestock, and minimal energy glasshouses, with food ingredients travelling the shortest possible distance.[201]

Recommendation 5

Local authorities and other public bodies should form partnerships in their areas to develop food strategies and action plans

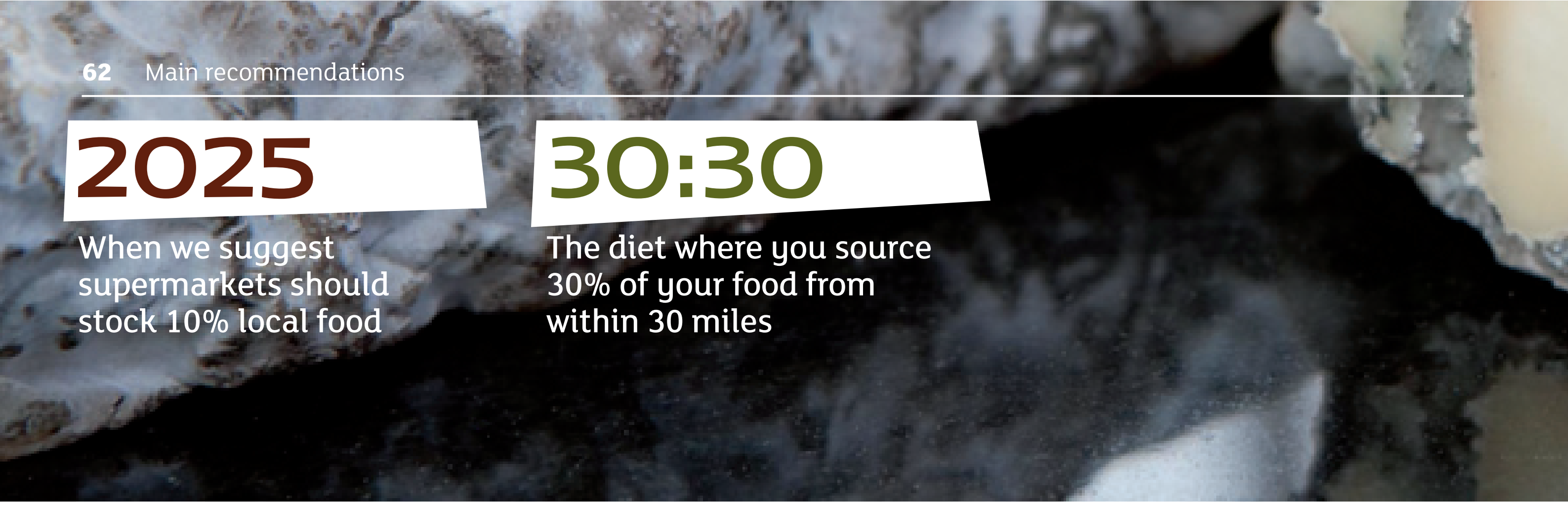
Local authorities should work with prospective partners such as other public bodies, local businesses and community groups to build broad-based public support for a comprehensive and strategic approach to food planning for their area. This should start with a survey of local food producers and suppliers based on the local food web concept.

Models of good practice are already developing in parts of the USA and the UK. For example, Bristol and Plymouth have adopted 'food charters' to engage key stakeholders and policy-makers. Other towns and cities have built formal food partnerships to carry out in-depth research and develop detailed strategies. In 2006, Brighton and Hove City Council was the first local authority in the UK to develop a comprehensive food partnership, strategy and action plan. The strategy covers sustainable food procurement, food waste, food access, education, economic development and climate change. Other areas following this approach include Durham, Cardiff, Herefordshire, Liverpool, Manchester, Middlesbrough and Sheffield, but many more should develop their own local food partnerships to extend the benefits they can bring.[202]

Recommendation 6

Local authorities updating their local plans in the light of the NPPF should add policies to support local food networks

The revision of local plans by local planning authorities in the light of the new NPPF is an important immediate opportunity to support local food networks. Local authorities should put in place a suite of policies to strengthen local food webs by building on NPPF policies on retail diversity and town individuality, support for markets and protection of productive agricultural land. This will also give a framework for neighbourhood plans to support local food.



2025

When we suggest supermarkets should stock 10% local food

30:30

The diet where you source 30% of your food from within 30 miles

Local authorities should draw on existing good practice to develop policies which:

- promote a good retail mix including small independents
- address the scale and location of new development ensuring it is well integrated with the town centre
- set a locally appropriate floorspace threshold for impact assessment of new stores
- include in the impact assessment of 'the wider area' or 'catchment' the effect on local food businesses
- maintain shops and markets in local centres as essential services and ensure easy walking, cycling and public transport access to main food shopping
- support food-based farm diversification – consistent with policies to protect the character of the countryside from inappropriate development – to help grass-roots economic growth, including through food tourism
- protect vital assets for local food such as small abattoirs and livestock marts, fertile farm land and land for community food growing.

Recommendation 7

Businesses within local food networks should work together to promote awareness, access, affordability and availability of local food

Local food businesses should capitalise on their common interest and existing relationships to share resources, expertise and knowledge to develop the local food market. They should develop joint approaches to address the challenges and barriers they face as smaller local food businesses in highly price-competitive markets.

They should explore a range of initiatives which could include:

- developing a clearly defined local brand (e.g. 'Local to Ludlow') and schemes such as reward cards, food maps and trails
- increasing access, convenience and service to their customers by agreeing late opening nights or Sunday opening or running shared delivery schemes
- developing shared distribution hubs, processing facilities or sales schemes such as box schemes, to reduce distribution, administration and sales costs and enable bulk buying and storage
- seeking funding from Rural Development Programme measures
- working with policy and decision-makers, local bodies and community groups to support a food strategy and action plan for the area.

Recommendation 8

Supermarket chains should set themselves demanding targets for stocking local food in ways which reinforce trust in local food

Supermarkets should use their market power positively by re-engineering their supply chains progressively to re-localise them and set themselves auditable targets to do so. This would help reduce food and air miles, cut the impacts of road freight such as congestion and infrastructure damage to roads as well as increase markets for smaller local producers, support the rural economy, aid innovation in the supply chain and increase access to local foods. They need to do this in ways which maintain consumer trust in the values of local food through clear provenance, cutting food miles and by supporting producers with equitable trading relationships.

Supermarket chains should:

- set targets to stock significant amounts of seasonal, local food – for example 10% by 2025 – as part of their commitment to more sustainable operations
- define local food clearly and distinctly from regional or national food to support local 'branding' and help reduce shopper confusion
- encourage direct deliveries to store or via local distribution hubs or regional hubs where these lie between the supplier and the store
- trade equitably with local food producers to support long-term investment in innovation and high ethical and environmental standards
- support the role of the Groceries Code Adjudicator to reassure customers they trade fairly with their local and regional suppliers.

Recommendation 9

Community groups should develop and engage in initiatives to shape their local food networks

Local community and civil society groups – along with parish and town councils – are ideally placed to shape their local food networks proactively. They should develop or get involved in a wide range of tried and tested initiatives – raising awareness, collecting information, developing local policy and directly improving supply of local food. These can help to support and strengthen diverse, human-scale, adaptable and localised ways to produce, trade and improve the quality of the food we eat.

Initiatives successfully trialled elsewhere include:

- joining with local businesses and public bodies to develop a food partnership for the area
- getting involved in developing the neighbourhood plan and including clear statements on the kind of shops needed
- under provisions in the Localism Act 2011, registering a list of assets of

community value such as village shops and pubs to give a right to buy in the event of closure
- mapping the local food web using the toolkit at **www.cpre.org.uk** to collect information for instance for evidence to change policy or planning decisions, to support new outlets or identify gaps in local provision
- writing a local food guide for shoppers or to link outlets and suppliers
- getting involved in community food growing, a local CSA or setting up a community food enterprise.

Recommendation 10

Individuals can and should act to change the way our food system works

People can act individually to improve the food we eat and the way it is produced and supplied. Every time we shop for food we vote with our wallets or purses for the kind of food system we want. By shopping widely for local food you can help to support a variety of shops, contribute to better livelihoods, and add to the quality and health of the community, the town and the environment where you live.

People can help their local food web in a number of ways:
- try a 30:30 diet, sourcing 30% of your food from within 30 miles or nearer
- use the most local outlets that stock high levels of seasonal local food
- ask in shops, supermarkets, cafés and other places where you buy food where it comes from; make businesses think about their buying policy and give them feedback to help them improve their ranges of local food
- remember: every time we shop for food, we're sustaining a particular kind of farming or food production.

Case study: a month of eating locally

Kent is known as the Garden of England, so what better place to try truly eating locally? Mapping volunteer Bridget Neame decided to eat only food from Kent during June. She found an amazing variety – but was also shocked to discover how many of her regular purchases weren't made locally.

There was a good selection of fruit, vegetables, milk and cheeses but finding butter and yoghurt was harder. There was plenty of meat and eggs, as well as fresh fish. Cereals were disappointing though, considering the amount of arable land in Kent. Bridget discovered two refurbished heritage mills grinding flour and rolled oats from Kentish grain, but that was all. She didn't find a baker using all Kentish ingredients, so made her own bread. Other discoveries included rapeseed oil from Romney Marsh and local dried fruit leather.

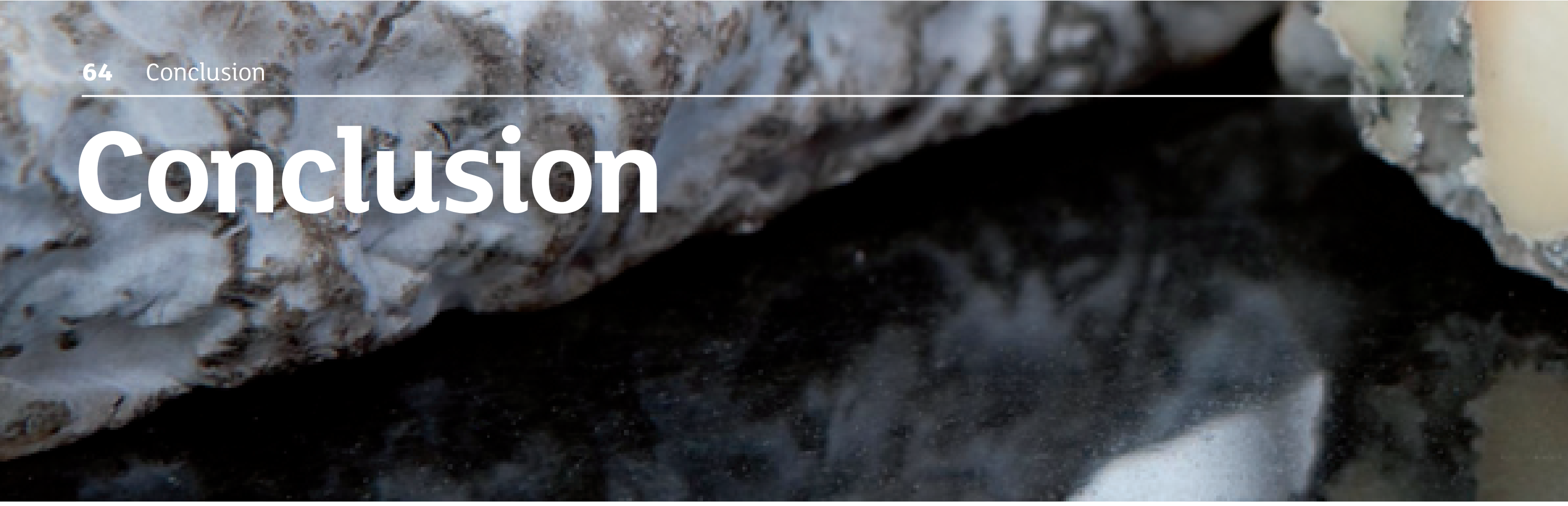
Did it cost more to eat locally? Bridget found she bought less food, didn't waste anything and made better use of her vegetable patch and the hedgerows for foraging. It took a lot of thought and planning, and she spent more time in the kitchen adapting recipes.

The experiment has changed Bridget's food buying habits. Pasta, rice and pulses, as well as tea, coffee and occasional chocolate, are her main non-Kentish ingredients, but now 80% of what she eats comes from Kent.

Twenty-four ways to make a difference

'How food shapes our lives in the future is up to us. Whoever we are and wherever we live, we can make choices together that would make an enormous cumulative difference. We can choose to eat ethically. Protect the countryside by 'eating the view'. Demand transparency in the food chain. Eat less meat and fish and pay more for it when we do. Support local farmers through box schemes, farmers' markets, or community supported agriculture. Buy from our local food shops if we are lucky enough to still have them. Talk to shopkeepers about food; let them know we care. Demand that whoever we buy our food from, whether local grocers or supermarkets, they source our food ethically on our behalf. Get political about food. Demand government action. Learn to read food labels. Cook more. Invite our friends over for dinner. Get invited back. Eat with our kids. Buy them baby frying pans for Christmas. Teach them to cook. Enjoy food more. Dig up the back garden. Start composting.'

Carolyn Steel
Hungry City:
How food Shapes Our Lives.[203]



Conclusion

The UK food system has been significantly re-engineered over half a century. Food supply, though never fully local in modern times, has been largely de-localised.

Titan stores that have taken the lion's share of the market have replaced a now almost unimaginable diversity of locally owned and managed shops, stores and stalls – greengrocers, butchers, bakers and fishmongers – with ubiquitous national brands that sell a vast array of products from around the globe. Less commented upon has been the loss of their counterparts – the wholesalers, abattoirs, livestock markets, processors and producers – in the local supply chains which supported them. Many town centres are hollowing out. Local land has become logoland.

Local food webs depend on town centres and local high streets. As the locations studied for this report show, outlets need to share the footfall of shoppers drawn in by a cluster of businesses. But as big name retailers are collapsing town centres continue to decline. In truth, this damaging situation has been a long time in the making: food was the canary in the coalmine, but it was ignored. It is the product we need to shop for regularly and frequently, but which has over decades moved out of many town centres. An interplay of factors – car ownership, busier working lives, high town centre rents and rates, the expansion of grocery chains, loss of smaller, local traditional food shops – has contributed.

The move of food out of town to functional sheds – superstores and hypermarkets – has driven up scale and driven down prices. Grocery chains fighting for market share with rock-bottom pricing have speeded the decline of smaller stores unable to compete. Into the bargain many such stores are too far to walk to, too difficult to reach by bus, so they require us to drive. With food gone, there is one less reason to visit the centre. With fewer visits and less trade a spiral of decline begins. This revolution, no less radical because of its gradual nature, has reshaped habits and towns – to the extent we are now asking what town centres are for.

The impact of these changes spreads beyond town centres. The loss of outlets has reduced the options for producers to get to market. The fewer larger businesses which remain can make harder demands and there are few other places to go. Businesses have to grow to find economies of scale, or find new channels to market, or go under. The steady flow of dairy farmers leaving milk production tells its own story.

Some will ask why this matters. If stores and farms get bigger and avowedly more efficient because market forces drive down costs then surely the consumer must benefit? Our food basket has got cheaper. Our food shopping is easier and more convenient. The shopper surely benefits again? But food, and the networks that provide it are, this report argues, a special case. Few products affect us and the world around us as elementally and fundamentally as food. So, though price and convenience are important, they aren't all that count. In fact we have failed to count all that matters.

Food is different from other things we buy. Clothes warm and adorn us but what we eat can underpin or undermine our health and well-being. It gives structure and shape to our family and social lives. While the nature of what we eat shapes us, the food we eat and how and where we buy it shapes the character of our towns, countryside and communities. If we buy from a range of shops we can help them survive. If we shop at one only, it alone will survive. Every time we eat we farm something somewhere, be it chickens, cabbages or cheese. Just as critically, farming alters the land it needs to produce our food and the wider environment. Both tilling the soil or grazing it have measureable and less quantifiable effects, intended and unintended, on soil fertility, water and air quality, wildlife, habitats and landscapes.

The impact of our food choices may be visible locally but also plays out on a larger stage. The UK imports much of its food and this makes demands on global agriculture. While trade in food can add to our food security, the stability and resilience of farming globally in the future is in doubt. The Foresight report reveals the many pressures farming and the food system face, from famine to obesity, soil, water, minerals, land and other resource pressures, rising energy costs, population growth and, last and perhaps uppermost, climate change. Farming globally faces demands to produce more with a shrinking asset base. To conserve and stabilise the ecosystems on which we depend we must strive to minimise food's environmental impact and, where possible, reverse some of the damage done through driving production for the past half century.

These major challenges which retail and farming face in turn affect local food networks and this raises questions

£250 MILLION

The total turnover of farmers' markets

750

The current number of farmers' markets in England

central to this report. Local food forms a relatively small share of the overall food market. Its supply chains have declined so they no longer fulfil a major role in our national food supply.

Can local food networks help to tackle these challenges and in what ways? If they can, how can they best be supported in doing so? This report shows there are three main ways that they are important:

1. Local food contributes to thriving and individual town centres. It gives smaller outlets a strong selling point. It attracts customers for its distinctiveness, taste and freshness, or wanting to shop in ways that help the environment and support local businesses. Local food outlets can bring in visitors and tourists for the food itself or the town character they help maintain. The interaction they engender supports community and connection. Food and especially local food needs to remain in town centres, and visibly so, to support access for all, footfall, character, diversity, distinctiveness and, not least, the pleasure of shopping.

2. Local food webs support the viability of a diverse farming industry and through it the health and character of the countryside it maintains. They provide vital channels to market for new, small and medium-sized businesses and fair pricing between producer and buyer. This supports investment and innovation and secures livelihoods. They act as 'seed beds' to cultivate business start-ups and help established businesses to innovate and expand. The range and distinctiveness of food locally available supports diversity in the farming systems that produce it. Local networks can support the breeds, varieties and genetic diversity, and the artisanal and traditional products and production that the industrial food system can squeeze out. Commodity markets need consistency; local markets can support variety. They can add value to products through a range of qualities that shoppers seek: freshness, seasonality, distinctiveness, provenance and reducing impact, be it food transport, packaging, on animal welfare or the wider environment.

3. Local food supports consumer and citizen engagement with food. In a market which fails to internalise the wider costs of the food system, the market alone cannot drive the changes to make the system more sustainable. This challenge needs to engage policy- and decision-makers, businesses of all scales, *and* communities down to individuals: we all eat and are all implicated. A major challenge is how to engage consumers in the issues. Local food offers one important way to do this. Local food helps shoppers understand where their food comes from and care about the people who produce it and the challenges they face. Local food reintroduces and reinforces connections with the realities of seasonality, of what can be and is produced – potatoes with soil, apples with blemishes, knobbly carrots – and reducing transport, packaging and waste from plot to plate. Vitally, the context in which we buy food matters. The human scale of local food networks, contact with retailers and producers and local links to land give meaning to what we buy and can reinforce our sense that buying locally makes a difference. Scale is not all but in giving meaning to our choices it matters. In a world where crisis appears to pile upon crisis, it is crucial that we nurture the sense that we individually and so collectively can make a difference.

A final question to address is: can the local food market grow enough to begin to re-localise our food supply? To stabilise then expand supply must be the goal, but an immediate challenge is superstore expansion pulling trade from centres and threatening business diversity. Supermarkets should grow their local lines and be part of the solution. If it is 'business as usual' and town centres continue to decline, this research tells us something of what could be lost: networks of micro and small local food businesses in towns and dispersed across the countryside and the contribution they make to local economies, communities and countryside. Where local food networks remain, there is cause for optimism. As if in response to the bland uniformity of omni-present chains, new ways to shop for food have burgeoned. Farm shops, farmers' markets, box schemes, social enterprises such as community-supported farms and community food growing projects are enriching choice and adding to the diversity of local stores and markets. They give hope that these networks can, with the right support, thrive and grow. The primary intention of this research is to make these networks more visible. It is up to policy-makers nationally and locally to put in place the right framework so they can be nurtured and expand. Ultimately, whether as businesses, communities or individuals, we all need to engage to make it happen.

Endnotes

[1] Note: we are not able to estimate the total number of businesses supplying to local supply chains because across all towns many suppliers will overlap and this would lead to double counting.

[2] This is on a head count basis as we do not have figures for retailers of full-time equivalent (FTE) staff

[3] Steel, C., 2008 *Hungry City – How Food Shapes Our Lives*, Chatto and Windus

[4] Steel, 2008:324

[5] Cranbrook, C., 1998, *Food Webs*, CPRE; Cranbrook, C., 2006, *The Real Choice – how local food can survive the supermarket onslaught*, CPRE

[6] Tesco defines local lines as 'those produced and sold within (...) the country in Ireland, Scotland and Wales'. **http://www.tesco.com/greenerliving/greener_tesco/what_tesco_is_doing/local_sourcing.page** [accessed 14 04 12]

[7] Kneafsey, M. , Lambie, H., Dowler, E. & Inman A., 2008, *Mapping Local Food Webs Concepts and Methods Interim Report Part 1*, SURGE, July

[8] COI, 2007, *Local food Omnibus Research Report – Prepared for the Food Standards Agency by COI*, **http://www.food.gov.uk/multimedia/pdfs/localfoodreport.pdf** [accessed 25 04 12]

[9] The definition of local is 'contained in EC Regulation 853/2004 but this relates solely to hygiene rules for food of animal origin.' LACORS, 2007, *Use of the Claims "Local" and "Seasonal"* October, **http://www.lacors.gov.uk/lacors/ContentDetails.aspx?id=17856** [accessed 25 04 12]

[10] Policy Commission on the Future of Farming and Food, 2002, *Farming and Food – a sustainable future*, Crown, January, p.46

[11] LACORS, 2007; COI, 2007

[12] Kneafsey et al., 2008:6

[13] Kneafsey et al., 2008:7-9

[14] Uses milk from herds reared and milked in Somerset, Dorset, Devon or Cornwall, **http://www.farmhousecheesemakers.com/pdo-our-provenance/** [accessed 19 05 12]

[15] Soil Association, 2001, *Local Food Routes*, Bristol

[16] Sustain, 2002, *Sustainable Food Chains – Briefing 1 Local Food; Benefits, obstacles and opportunities*

[17] Johnson, R., Cowan,T. & Aussenberg, R.A., 2012, *The Role of Local Food Systems in U.S. Farm Policy*. Congressional Research Services Report for Congress. January 20 p.7

[18] Johnson et al., 2012:5

[19] Kneafsey et al., 2008:11

[20] The researchers clarify this: 'As such local food webs are not trading highly processed products e.g. tinned goods, frozen ready meals, microwave meals etc.' Kneafsey et al., 2008:11

[21] Portas, M. 2011, *The Portas Review – an independent review into the future of our high streets*, 13 December, Department for Business, Innovation and Skills, pp.7-10 **http://www.bis.gov.uk/assets/biscore/business-sectors/docs/p/11-1434-portas-review-future-of-high-streets** [accessed 20 04 12]

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[70] Food Production to Supply Ratio, calculated as the farm-gate value of raw food production (including for export) divided by the value of raw food for human consumption.

[71] DEFRA, 2011:35 – The figures were £32.5 billion for imports compared to £14 billion for exports

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[108] IGD, 2012

[109] IGD, 2012

[110] The co-operatives are part of this history: from the first Rochdale grocery store in 1844 to over 1,400 such retail co-operative societies by 1890, co-operatives grew to take one third of the grocery market share by the 1950s and with 10 million members (Simms, 2007:70).

[111] Kantar Worldpanel, 2012; according to DEFRA, 2011:21 Kantar Worldpanel are the most up-to-date data.

[112] Cranbrook, 2006:3

[113] Tesco's website enables searching for local produce within 30 miles of the Hexham store which reveals seven local products at the time of writing the location report (August 2011): free-range eggs, milk, ice cream, Nettle cheese, chilli sauce and beer, **www.tesco.com/greenerliving/greener_tesco/faqs/qa_local_sourcing.page?** [accessed August 2011]

[113] **http://www.morrisons.co.uk/Corporate/Corporate-responsibility-2011/Policy-Guidance/British-Regional-and-Local-Sourcing/** [accessed 14 04 12]

[114] **http://www.morrisons.co.uk/Corporate/Corporate-responsibility-2011/Policy-Guidance/British-Regional-and-Local-Sourcing/** [accessed 14 04 12]

[115] **http://www2.sainsburys.co.uk/aboutus/policies/policies.htm** [accessed 14 04 12]

[116] Estimates of the percentage of local based on Kantar Worldpanel, 2012 data of all expenditure at the four major supermarkets through main store tills (but excluding petrol and in-store concessions) converted to an annual figure to estimate turnover

[117] **http://www.asdasupplier.com/about-us/local-sourcing**
http://health.asda.com/sustainability/ethical-eating/local-and-regional.aspx [accessed 14 04 12]

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[121] Tesco, 2012

[122] **http://www.thepeoplessupermarket.org/** [accessed 20 05 12]

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[124] **http://www.booths.co.uk/news-article/Booths-and-Slow-Food-announce-partnership-deal** [accessed 17 04 12]

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[126] IGD, 2012

[127] Symbol groups are a form of retail franchise: the group acts as supplier to smaller grocery stores which trade under a common name such as SPAR or Premier

[128] Figures from IGD (2012) for 2011 data compared to IGD 2010 data cited in Schoenborn, 2011:12-13

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[130] All data from Plunkett Foundation, 2011, *Community Owned Village Shops: A better form of business*, January

[131] SPAR is a symbol group: individual SPAR members are independent but benefit from being part of a large international organisation with collective buying and marketing power, a strong corporate image and access to a range of equipment and resources

[132] This figure uses generally 2001 census data for the town/city. Where urban boundaries are not contained within the 2.5-mile radius study area, ward data for the areas covered by the study area have been used to derive a more accurate population total i.e. for Birstall (20,000) and Sheffield (284,000)

[133] The figure of 697 towns and 50 cities in England was calculated using the *Great Britain Economic & Trade Digest*. **http://www.gbet.com/AtoZ/**

[134] The ratio of each job supported to turnover varied from £28k-£81k p.a. between highest and lowest locations; figures for supermarkets were calculated from data in 2011 company annual reports as follows: Tesco – £138k p.a. **http://www.tescoplc.com/media/417/tesco_annual_report_2011_final.pdf**; Sainsbury's – £141k **http://www.j-sainsbury.co.uk/media/171813/ar2011_report.pdf**; Morrisons – £144k **http://www.morrisons.co.uk/corporate/2011/annualreport/financial-statements/group-financial-statements/consolidated-statement-of-comprehensive-income/Default.aspx#** [accessed 15 03 12]

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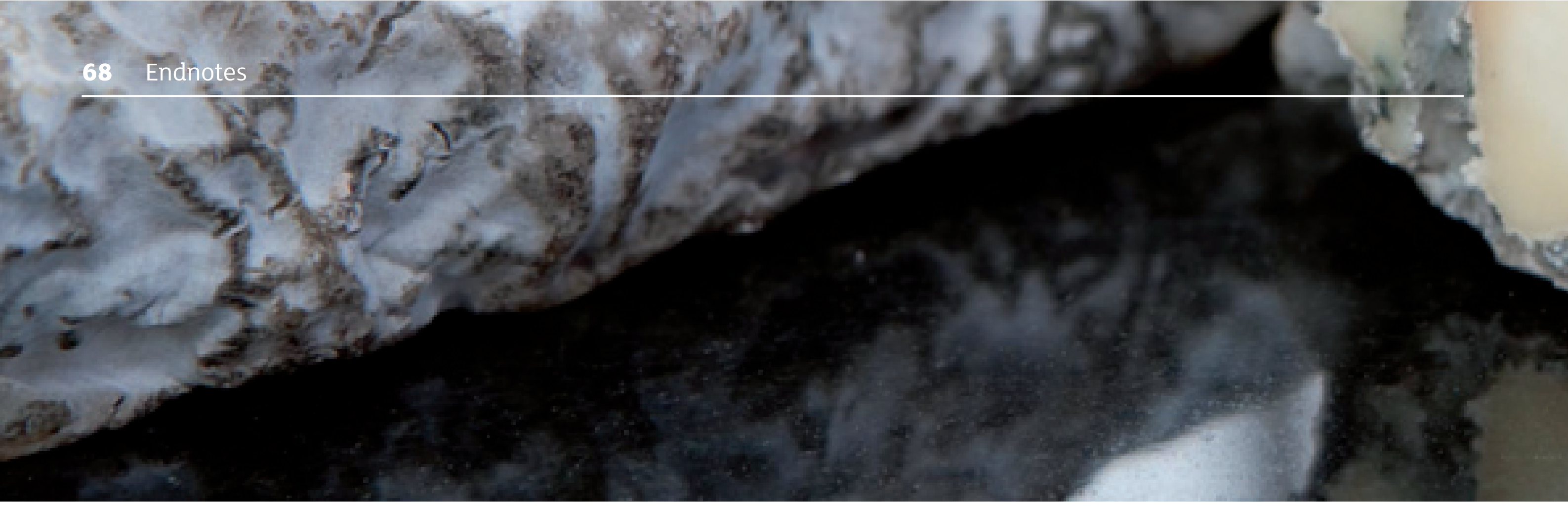
[138] These were Tesco, Sainsbury's, Marks & Spencer, Boots and John Lewis. Monbiot, G.,2009, *Tesco-opted*, August 10 **http://www.monbiot.com/2009/08/10/tesco-opted/** [accessed 29 04 12]

[139] Porter, S. & Raistrick, P., 1998, *The Impact of Out-of Centre Food Superstores on Local Retail Employment*. National Retail Planning Forum. **http://www.nrpf.org.uk/pub.htm** [accessed 07 12 11]

[140] Portas, 2011:31

[141] See IGD *ShopperVista*, *Shopper Trends* 2011 February survey: the economic downturn has accelerated the trend for locally sourced food, as shoppers have sought to support local economies and communities. In December last year, over half (52%) of shoppers claimed to purchase local products in order to support local producers, a quarter (25%) to support local



retailers, and over a fifth (22%) to keep jobs in their area.' **http://www.igd.com/index.asp?id=1&fid=1&sid=8&tid=30&folid=0&cid=1489** [accessed 29 04 12]

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145 NEF, 2005, 'Buying local worth 400 per cent more', **http://www.neweconomics.org/press-releases/buying-local-worth-400-cent-more** [accessed 07 12 11]

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147 Schoenborn, 2011:39

148 Schoenborn, 2011:29

149 Schoenborn, 2011:29-31

150 Kay, J. 2009, *The Future of Markets*, Wincott Lecture, 20 October, **http://www.wincott.co.uk/Wincott_Lecture_Oct09.doc** [accessed 23 05 12]

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153 See The Church of England Ethical Investment Advisory Group, *Company Supply Chains: the issues for responsible investors*, January 2007, **http://www.churchofengland.org/media/36539/supply_chain_january_2007.pdf** [accessed 24 05 12] *Concern over late payments to small suppliers,' news article, 31 August 2006,* **http://www.theaccessgroup.com/2134.aspx** [accessed 24 05 12]

154 For produce unavailable within the 30 mile radius, this boundary may be extended up to 50 miles.

155 Cranbrook, 2006:16

156 MLCSL, 2010, *Livestock Markets in the 21st Century: A Review of the Livestock Markets in England – the Challenges and Opportunities*, p.8, **www.eblex.org.uk/documents/content/publications/p_cp_livestockmarket2010040111.pdf** [accessed 09 02 12]

157 According to Ed Bedington, editor of the *Meat Trades Journal*, in 2010 there were just 6,553 butchers' shops. Quoted in 'Bringing home the bacon: could butchers come back to the high street' **http://www.guardian.co.uk/lifeandstyle/wordofmouth/2011/aug/17/butchers-return-high-street-independent** [accessed 08 02 12]

158 The NPPF stipulates that: 'Local authorities should seek to improve the quality of parking in town centres so that it is convenient, safe and secure (…). They should set appropriate parking charges that do not undermine the vitality of town centres. Parking enforcement should be proportionate.' DCLG, 2012:11 para. 40

159 Portas, 2011:27-28

160 East Cambridgeshire District Council, 2007, *Ely New Estates Study*, **www.eastcambs.gov.uk/sites/default/files/ldf/ely_estates_survey_2007_32266.pdf** [accessed 19 04 12]

161 Cited in Portas, 2011:39; section 106 agreements between local planning authorities and landowners are legally binding obligations often to provide services or infrastructure to make a development acceptable in planning terms

162 Cited in Portas, 2011:39

163 These measures are permitted by European Union Directives, though specifying local produce is not. These recommendations are drawn from Food Links UK, 2006, *Best Practice in Sustainable Public Food Procurement*, June, **www.sustainweb.org.uk**

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185 Cabinet Office, 2008:87

186 Garnett, 2003

187 Garnett, 2008:29

188 DEFRA,2012a

189 DEFRA, 2005, *The Validity of Food Miles as an Indicator of Sustainable Development.* **http://archive.defra.gov.uk/evidence/economics/foodfarm/reports/documents/foodmile.pdf** [accessed 15 11 11]. For example, in one study it showed how a sandwich company in Derbyshire, which lay a few hundred metres from a major supermarket chain it was serving, was transporting its sandwiches 160km away to a redistribution hub: a clear example of an unsustainable model of food distribution.

190 Foster et al.,2006:136-137

191 Cross, P., Edwards, R. T., Opondo, M., Nyeko, P. & Edwards-Jones, G., 2009, 'Does farm worker health vary between localised and globalised food supply systems?' *Environment International*, 35(7): 1004-1014

192 Foster et al., 2006:141

193 Foster et al., 2006:141

194 Analysis for Burnley had not been completed by the time of writing so is omitted here

195 Portas, 2011:12

196 See NPPF paragraphs 111 & 112 in DCLG, 2012:26 for policy on brownfield and fertile agricultural land; see para. 28 in DCLG, 2012:9 for rural diversification

197 See NPPF para 23: 'local planning authorities should: recognise town centres as the heart of their communities and pursue policies to support their viability and vitality', DCLG, 2012: 7

198 DCLG, 2012: p.1,5

199 This should allow some scope for expansion in growing areas or contraction; it is even more relevant now that strategic planning has gone in order to retain local retail hierarchies

200 This was a major recommendation of the Competition Commission grocery market enquiry which reported in 2008. The test targeted Tesco by suggesting a market share locally of over 60% as a threshold and was supported by most major retailers but not Tesco. Tesco 'appealed to the Competition Appeals tribunal on the grounds that its impact on consumer benefit was not sufficiently assessed' and was successful (Schoenborn, 2011:38). A reframing of consumer interest beyond price benefit to individual consumers would support market diversity and greater competition on the high street.

201 NL Agency, 2010, *Criteria for the Sustainable Public Procurement of Catering Version: 1.3.* 26th March, Prepared for the Ministry of Housing, Spatial Planning and the Environment (VROM) p.2 **http://www.senternovem.nl/mmfiles/Critieriadocument%20Catering_tcm24-323613.pdf** [accessed 16 05 12]

202 These are: the Brighton and Hove Food Strategy, Durham Food Strategy, Cardiff Food and Health Strategy, Herefordshire Food Partnership, Sustainable Food Strategy and Action Plan, Food Futures Food Strategy for Manchester, Liverpool Food and Health Strategy, Middlesbrough Food Sustainability Action Plan, Sheffield Food Plan

203 Steel, 2008:323-4

Summary of mapping locations

Pilot locations

Birstall: a large village (pop. 12,500) in Leicester's northern suburbs.
Hastings: a large seaside town (pop. 86,000) on the East Sussex coast.
Kenilworth: a historic market town (pop. 24,000) in the heart of Warwickshire.
Knutsford: a small market town (pop. 20,000) on the Cheshire Plain just south of Manchester.
Sheffield: one of the largest cities in England with a population of over half a million people.
Totnes: a small market town (pop. 8,500) in the South Hams district of Devon.

Main locations

Burnley: a large market town and former industrial centre (pop. 74,000) in Lancashire.
Darlington: a large market town (pop. 99,000) in the Tees Valley, north east England.
Ely: a cathedral city in Cambridgeshire, the third smallest in England (pop. 19,000), and a designated market town.
Faversham: a traditional market town in the heart of Kent (pop. 18,000); home to the National Fruit Collection.
Haslemere: a small country town located on the Sussex-Hampshire border (pop. 16,000).
Ledbury: a bustling market town (pop. 10,000) in south east Herefordshire.
Hexham: a historic market town (pop 11,000) in the Tyne valley in Northumberland.
Newark: an affluent market town (pop. 27,000) in Nottinghamshire.
Norwich: the largest city in the East of England (pop. 130,000).
Otley: a small market town (pop. 15,000) in West Yorkshire close to the Yorkshire Dales.
Penrith: a market town (pop. 15,000) in the Eden Valley, Cumbria.
Shrewsbury: a large town (pop. 96,000) in Shropshire close to the Welsh border.
Yeovil: a large market town (pop. 42,000) in south Somerset.

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The Campaign to Protect Rural England (CPRE) fights for a better future for England's unique, essential and precious countryside. We believe a beautiful, thriving countryside is important for everyone, no matter where they live.

Making Local Food Work is a five-year programme funded by the National Lottery through the Big Lottery Fund. It helps people to take ownership of their food and where it comes from by supporting a range of community food enterprises across England.

The Big Lottery Fund's Changing Spaces programme was launched to help communities enjoy and improve their local environments. The programme is funding a range of activities from local food schemes to education projects.

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