

Food and Health

Consumer confidence and UK food retailing: Why does local food matter?

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Abstract

Over the last 50 years, the UK fresh food market has been increasingly challenged by the growth and domination of large grocery chains. Supermarkets now source supplies on a national and international basis. They have purchasing power to undercut small-scale local production and distribution systems that minimise many of the past advantages of short distances between the producer and the consumer. This alters producer perspectives. Larger-scale production and sales contracts for national distribution are favoured. Smaller producers focusing on supply to local markets have tended to struggle as retail opportunities for their fresh produce diminished. Street markets for fresh food, once the main source for the UK urban population, are now a minor contributor to overall sales. In part this results from a larger population and the limited number of markets operating within traditional constraints of time and location. In part, also, consumer perceptions of quality in street markets declined with the ascent of pre-washed *binbo* fruit and vegetables along with the disembodied, pre-packed meat favoured by many. Excessive pesticide use, BSE, foot & mouth disease and *E.coli* problems have all recently taken their toll of consumer confidence and have disturbed taken-for-granted urban assumptions about food safety. Furthermore, media attention on factory farming techniques have focussed public disquiet on issues that, until a few years ago, many consumers were happy to ignore. Vegetarianism, organic production methods and attempts to reconnect food producers and local consumers are arguably related strategies emerging from these problematic issues of consumer confidence. By reference to UK experiences over the last 10 years, the paper explores food shopping trend convergence, reduced consumer trust, and attempts to restore confidence.

Key words: Local food, organic food, food retail, consumer confidence.

Introduction

Easy access to locally produced food ought not to be a problem in modern societies with long-established agricultural systems. Nevertheless, it is increasingly a problem and this has implications for consumers. Historically, local food was consumed by producers with any surplus distributed to the local community on a trade, exchange or gift basis. Food self-sufficiency was an early, but often precarious, achievement of human social organisation. In northern Europe, year-round supplies were typically secured only through dietary change to reflect seasonal variations in availability and increasingly successful preservation techniques to retain food from periods of glut to those of scarcity¹. For much of UK history, the focus was on local food production and consumption but this was augmented by development of trade on a national basis so that food consumed in Scotland might well have been produced in southern England, or *vice versa*. Even before extensive urbanisation in the 19th century, there were parts of the UK better suited to the production of particular commodities and developed a specialist reputation - Kent apples, Welsh lamb, Norfolk turkeys, Scotch beef, Lincolnshire potatoes - for example. However, seldom was production undertaken solely in one area and this gave rise to regional variations - butter and cheese for example - and disputed claims for which was best. For most people, augmentation of supplies by importation was a marginal contribution until relatively recent times. In the UK, for example, it was only in the later decades of the

19th century that the British Empire, and an extensive merchant navy, produced substantial dietary benefits for ordinary people. As chronicled in the early 20th century, while imported food had the effect of making basic commodities cheaper, it did not banish hunger among the poorest nor did increases in the variety of food necessarily improve the quality of poor people's diets². Imported foods did, however, support the population redistribution effects of industrialisation and urbanisation. By the start of the last century, 80 per cent of the UK population were living in urban areas and while this amplified demand for local agricultural production, it also stimulated demand from other parts of the country and for foreign trade. Urban grocery chains prospered in these new markets and grew ever more sophisticated in sourcing supplies at the keenest prices and organising regular large volume imports where domestic supplies were inadequate or unavailable³. For at least a century, British people have routinely had imported food available. Typically this was known at the point of sale, accepted on the basis of geographical advantage for specialised agricultural production, and sometimes it had a certain caché. Often food was shipped from parts of the British Empire or subsequently from the British Commonwealth - New Zealand cheese and butter, Australian lamb, South African apples, Indian or Ceylon tea - but this did not preclude other sources - Spanish oranges, Danish bacon, Dutch tomatoes or Argentinean beef, for example. Reliance on these imports was usually seen as low risk dependence because sources were reciprocal trading

partners, and Britain was a maritime trading nation. Food shortages only occurred when international conflict closed shipping routes, or restricted cargo capacity. There were widespread food shortages in both the 1914-18 and 1939-1945 world wars with partial food rationing persisting until 1954 in the UK. Other than during these periods of crisis, reliance on imports has not been contentious although it has co-existed with fairly extensive government support for British agriculture and periodic campaigns to promote British produce via specific marketing boards. British consumers are thus long-practised in their awareness and acceptance of nationally sourced or imported food. The central concern of this article has little to do with any changes in this aspect of consumer culture. If anything, immigration and tourism in recent decades have meant a wider range of imported commodities is routinely sought. In the last few years, however, there have been extensive consumer concerns about food production methods and related food safety – from salmonella to BSE (Bovine Spongiform Encephalopathy) - that have been translated into reduced confidence and increased scepticism. While food production *per se* is seen to be the source of these problems, arguably they have more to do with the extensive power supermarkets have over food producers and agricultural practices. In response to the sequence of well-publicized crises, there are a number of separate but congruent trends emerging to seek re-imposition of a measure of consumer control over the quality and provenance of the food they purchase.

UK Food Retailing

Writing of the late 1940s and early 1950s, Goldenberg wrote of *Marks & Spencer's* priorities – as retailers - being initially focussed on post-harvest handling of fresh fruit and vegetables. ‘There were a number of reasons for this. The most important was that this was where, at the retailing end, we at M&S could really make a worthwhile contribution; we thought that the technology of the growing of fruits and vegetables was pretty well-known and, therefore, for the time being, that our suppliers did not need any help here from us. By-and-large, this view proved to be right in the years to come’⁴. Post-harvest handling and, in particular, presentation at the point of sale has remained an important aspect of the food retail role, but this has not been unproblematic. In the early days of supermarket shopping, 8 out of 10 British housewives saw these new food shops as hygienic and convenient but had reservations about pre-packaging and their suitability for perishable foods⁵. At that time, they were cautious about the quality of supermarket fruit, vegetables, bread, pastries and, especially, fresh meat. They preferred to buy these items at the traditional smaller specialist shops. There was ... ‘an assumed lack of choice in meat and vegetables compared with the specialist shop and some suspicion that supermarket operators are less knowledgeable about these products’⁶. In part, also, there was a lingering value placed on personal service and a view of supermarket owners as efficient but impersonal. Set against these concerns at the time was the assurance, based on American experience, that the buying power of supermarkets would have a strong positive influence on quality. This was to be based on much earlier interventions with producers and, often, a circumvention of conventional wholesaling arrangements. ‘One has only to consider the way the supermarkets in America have raised the standards of meat, and how they have educated the produce growers in the application of new techniques in the gathering

and on-the-field preparation of greenstuffs, to recognise the opportunity which lies ahead for the steady process of upgrading which must in the last analysis be the guiding policy behind supermarketing’⁷. An even greater optimism and sense of purpose prevailed in *Marks & Spencer* food retailing later on. In 1966, a senior executive saw their role as central to quality improvement for however mechanized and efficient British farming was, high quality production could not be guaranteed unless: ‘(1) the farmer starts with the right breed of animal or the right strains of seed, and applies to farming the lessons of modern technological development; (2) the produce is cleaned and graded in modern packing houses, processed in modern factories, and speedily transported to the retailer, so that it is still fresh when it reaches the customer’⁸. Supermarkets were not content to be passive purchasers in the wholesale markets – buying at the quality/price levels available at the time. Rather, they sought to reduce such uncertainties and exploit the advantages of direct relationships with producers to ensure a consistency of supply and quality.

In the UK today, concentration of supermarket purchasing power has produced a very different food retail topography to that which existed even 30 years ago. In 1999, independent grocers comprised 75.2% of the 34,452 shops but shared only 6% of the £67,216 million food retail turnover. Top multiples – *Asda, Iceland, Sainsbury's, Somerfield* and *Tesco* - had just 8.6% of the shops, and 71.9% of the turnover⁹. Market domination by a few large firms has undoubtedly brought significant benefits to consumers in terms of the overall product range, convenience and price but it has also distorted the market for food suppliers and has, paradoxically, reduced diversity. To a large extent, supermarket chains – as major or sole purchasers - are now able to specify for suppliers rather more than the food quality and safety characteristics required by legislation, or the latest scientific thinking and production practices. They are increasingly able to determine the variety, size and condition properties of food to meet their commercial requirements as retailers to the extent that these become industry benchmarks. Against the advantages, there are a number of reported disadvantages with the direct linkage of retailers and fresh food producers, most of which are not inherent in the relationship but which are manifest in practice.

-Producers invariably trade greater certainty of high volume sales for reduced prices but ‘price pressure has been used particularly on growers of fresh produce, who are uniquely vulnerable, given that their produce is perishable’¹⁰.

-Power in the relationship is asymmetrical. ‘Today, in the UK, the retailer has been the dominant force for more than 10 years. A big manufacturer, classically, may find 10 per cent or 15 per cent of his brand selling through a single retailer buying point, which will take a mere 1 per cent of its purchases from this same manufacturer’¹¹.

-In consequence, retailers determine producer practices. ‘Crucial interactions were with the suppliers of fresh foods – meat, vegetables and bakery ... who were offered attractive volume contracts but with limited security, and as the market became more competitive, they had to absorb and act upon endless requirements not merely to keep quality standards up, but at the same time to improve efficiencies and lower costs. The supermarkets were in a uniquely strong position to exploit volume strength’¹².

-Being able to dictate low prices for producers has not always been to the benefit of consumers. The gulf between the price

paid to producers and that charged for food on the supermarket shelf has been a source of considerable debate in recent years. Against falling 'farm gate' prices, supermarkets justify maintained or increased retail prices by reference to processing costs or by the claim that they are, in fact, losing money on some food products¹³.

-Supermarkets are also accused of exploiting producers/suppliers on a number of specific issues including 'imposing an unfair balance of risk...de-listing producers/growers who are unable to deliver agreed quantities owing to weather conditions ... requiring the producer/grower to bear the cost of surplus special packaging ordered by the supermarket chain for a promotion when the sales did not meet expectations ... requiring prospective suppliers to contribute to the cost of buyer visits, artwork and packaging design, consumer panels, market research, or to provide hospitality to the supermarket employees requiring suppliers to purchase goods or services from designated companies e.g. hauliers, packaging companies, labellers'¹⁴.

-Supermarket share of the food retail market has a parallel in their dominance of the wholesale markets. With their buying power, it is difficult to avoid selling to their terms especially with reasonable volumes of perishable produce. 'By buying direct from suppliers, the supermarkets had undermined the wholesale markets through which growers had once been able to sell their produce. In 1974 there had been 150 main wholesale markets in Britain; now there were only 37. Of the 11000 growers left ... [it is estimated that] ... only about 2000 who sell to supermarkets are very profitable. The rest must find markets through farm shops or the declining number of small greengrocers'¹⁵.

-Increasingly, supermarkets want to be supplied by companies 'who can supply all their stores throughout the UK via a small number of dedicated retail distribution depots'¹⁶. This tends to favour large producers/suppliers at the expense of smaller ones.

-Supermarket power extends also to specification of the products themselves. 'What retailers want is bimbo fruit, all perfect looks and shelf life, with a touch of genetic engineering to help it along the way. So what we eat is determined not by its flavour but the distribution system and retailing strategy of supermarket chains'¹⁷.

Supermarkets have undoubtedly increased the efficiency of food retailing and given price advantages to consumers. However, pressure-group criticism about the role they play has grown in line with the increasing dominance of food retailing and influence in food production by relatively few companies. By the mid-1980s, there was already concern not only about the closure of small specialist shops but the abandonment of main shopping streets in London by supermarket retailers because their older, smaller, premises were deemed uneconomic. 'It is these smaller supermarkets and the people they served, which have proved most vulnerable to large store development in food retailing The closure of 400 Tesco stores over the last ten years has taken place alongside a similar programme of closures of smaller Sainsbury's and Co-operative Society supermarkets'.¹⁸ This pattern of closure for small grocery shops, and then smaller supermarket units, was repeated throughout the UK with the effect that the geography of food shopping has changed, and convenience is largely restricted to those who have cars. The term 'food deserts' - paradoxically existing in urban and rural areas - has been used to describe the residual lack of provision or access difficulties. 'In the cities, food deserts are found in

areas where a fall in population has pitched local shops into decline and a doomed struggle against supermarkets. Only corner shops remain, selling a limited and overpriced range of packaged foods. In the country, the closure of hundreds of village shops and poor public transport has left people without cars facing enormous difficulties. The problem is worse for the elderly, the housebound and the poor'¹⁹.

Major supermarket chains control much of the UK food retailing. They profoundly influence variety availability and price; they establish the benchmarks of appearance and packaging. In 50 years they have done much to shape consumer expectations and behaviour but times have changed for supermarkets and shoppers. Many consumer concerns from the 1950s and 1960s have now either turned out better than was feared, or are better tolerated with the eclipse of traditional food shopping expectations²⁰. Conversely, there are issues particularly the relationship between supermarket and food producer that echo early consumer anxieties and limit the value of reassurances on food quality. As an extensively urbanised society with a very small agricultural workforce, the producer-retailer relationship warranted little routine consideration. Occasionally animal rights groups would draw attention to particular aspects of industrialised farming but, for most, there was little sustained engagement with such issues. In the main, criticism of the way that supermarkets function - in relation to both consumer and producers - has largely by-passed consumers. Some may bemoan the passing of small food shops, but still collect their groceries - especially their main food shopping - from a suburban retail park.

Food Scares

UK consumers have, however, been confronted with a number of food safety issues in recent years. The media have extensively covered incidents with the effect that, arguably, traditionally widespread trust in the safety of food production practices and regulatory arrangements has been substantially eroded. The UK experience of food safety issues has been both protracted and diverse. From low-key coverage of isolated food poisoning incidents, there has been a changed media stance, arguably in response to the increasing gravity and extent of the problems. Food poisoning, for example, has increased substantially in terms of the number of cases being reported by doctors to the authorities²¹. Salmonella incidents increased substantially in the 1980s and became a political *cause célèbre* with the 1988 resignation of a government health minister for warning that most UK eggs were infected - an inherent risk. Egg sales fell and the government was obliged to support the crippled industry. The spotlight fell on egg production methods and chicken food, genetic selection, possibilities for aerosol transmission via drinking water and environmental contamination, and the difficulties of adequately cleaning poultry houses to eradicate infection may all have had some part in the problem²². However, the problem persists and Salmonella cases have continued to increase. Clear identification of the causes of initial infection and subsequent transmission to humans remains elusive. Perhaps necessarily, attention is still drawn to the way that food is sold, handled in the domestic environment and consumed rather than how it is produced. Phillips²³ suggests a combination of the following to explain the increase for Salmonella and Campylobacter. Changes in shopping habits that mean purchasing larger amounts of food to be stored for longer periods at home; increased numbers of chilled ready-

prepared meals that have short shelf lives and need carefully controlled storage temperatures and heating procedures; increased consumption of fast foods and 'eating out' generally are factors which sit uneasily with the emergence of new strains of micro-organisms and increased public awareness. Production, and the factors that encourage specific production methods, remain problematic.

In 1986 BSE (Bovine Spongiform Encephalopathy) was identified in British cattle and, eventually, the initial cause was confirmed as contaminated feed. The impact on beef consumption was dramatic, despite government assurances that the problem had been brought under control. Even in the 1990s, concern was being expressed about the effectiveness of revised meat processing procedures^{24,25,26}. Even though the linkage between this cattle disease and human health was initially tenuous²⁷, the graphic images of animal distress were sufficient to raise consumer fears. Beef was taken off the menu of many schools²⁸. Government assurances became less credible but were still being offered in 1995. Douglas Hogg, the Agriculture Minister said the Government acted on the advice of a panel of experts who had given extremely careful thought to all the issues. "They conclude that BSE is not transmissible to humans and that in any event our controls are effective enough to prevent the infective agent getting into the human food chain"²⁹.

Despite such official assurances, in 1995 vCJD (variant Creutzfeldt-Jakob Disease) was identified and linked with BSE, bringing into question not only the value of the assurance, but undermining the accuracy of expert advice. The role of Government in consumer protection on food issues had been discredited since the 1988 salmonella problems. Food safety problems were associated with increasingly intensive agricultural production but there were well-publicised problems also with food handling. In 1996, Central Scotland's worst outbreak of *E-coli* food poisoning claimed 18 lives and, at its peak, 127 people were in hospital³⁰.

Over the years, publicity associated with the way in which food is now produced in the UK has had a damaging effect on consumer confidence. This is expressed to the extent that even when there is no demonstrable problem for humans – for example, genetically modified food, and foot and mouth disease – consumer fears are amplified. The longer-term implications of the UK Government's slaughter policy for foot-and-mouth disease – not just the disease itself - has yet to be seen but it is probable that this will further depress red meat sales. Even now, health problems are in sight for farmed salmon – a food product that many might regard as an acceptable substitute. While Infectious Salmon Anaemia (ISA) is not a direct threat to human health, under European Union legislation infected stocks must be killed^{31, 32}.

Concern about pesticide use in food production has a long history. *Silent Spring*³³ was first published in 1962 but debate tended to be located within academic or other arena marginal to the lives of most consumers. Ecology and food production may have vied for popular and scientific attention but the latter was clearly of greater weight given widespread belief in the power of science to resolve any undesirable outcomes. Tolerance of the ambiguities of pesticide use is presumably also a function of the perceived degree of risk against benefits for humans.

Scientific reassurance that 'a decision often involves weighing an advantage to human beings against an advantage to wild life'³⁴ and that any residual pesticides in food usually occur only ... 'at trace levels, well below the tolerance levels set by

the Food and Drug Administration'³⁵ suggested high levels of knowledge about long-term toxicity in humans. This confidence was reinforced by the idea that any problems of ... 'excessive levels - that is those exceeding legal tolerance limits – occur rarely and are normally the result of failure to follow precise recommendations for application'³⁶. Carson had already seen the paradox enshrined in setting tolerance levels. 'To establish tolerances is to authorize contamination of public food supplies with poisonous chemicals in order that the farmer and the processor may enjoy the benefits of cheaper production – then to penalize the consumer by taxing him to maintain a policing agency to make certain that he shall not get a lethal dose. But to do the policing job properly would cost money beyond any legislator's courage to appropriate, given the present volume and toxicity of agricultural chemicals. So, in the end the luckless consumer pays his taxes but gets his poisons regardless'³⁷.

Recently, the Consumers' Association reviewed results of UK Government pesticide residue test data for the previous four years. This analysis concluded that... 'while most fruit and vegetables contain no detectable residues, others consistently contain residues and some exceed the legal limit'³⁸. Although specific pesticide residues *per se* are problematic, a different level of concern was expressed in relation to what was being monitored by the testing procedures. 'Pesticide safety evaluations look at individual pesticides and not the effect of combinations of different chemicals. But some foods can contain multiple residues because the crop is treated several times and often with different pesticides. For example, an average lettuce is treated with insecticides 5 times; strawberries are treated about 12 times and dessert apples as many as 16 times with pesticides containing 36 different active ingredients'³⁹. In effect, it is suggested that test data may give a false sense of security because the long-term effects of chemical combinations are largely unknown.

Pesticides are only one manifestation of routine reliance on agricultural chemicals. Increasingly, food is also treated to ensure that it reaches supermarket shelves not only blemish-free, but in optimum visual condition^{40,41}. While pesticide residue in meat is normally low or absent in tests, assurance of meat safety - and growth promotion - in intensive production systems is often achieved with routine antibiotic (zootechnical feed additives) use⁴². The UK Department of Health reported a significant threat to human health in the growth additives used in food production. 'The Advisory Committee on Microbial Safety of Food which presented the report, warned that unless drastic action were taken several nasty human conditions, from salmonella to *E-coli*, would become wholly resistant to antibiotics. Eat enough carelessly farmed chicken, the report implies, and your immune system will start to pack up'⁴³. The problem of chemical contamination emerges in different guises. Recently seven brands of honey – produced in China but sold under UK supermarket own-brand labels – were withdrawn from grocery shelves because they were found to contain streptomycin residue⁴⁴. A month later, several supermarket own-brand frozen prawns were also withdrawn from sale nationally because they were found to contain residues of nitrofurans⁵. Publicity about any one of these food safety issues might have caused a change of consumer behaviour avoidance of specific commodities or revised handling procedures - even if it was both partial and transient. However, the sequence of incidents over a period of years often with substantial overlap between the aftermath of one problem and development of the next has

created deep-seated anxieties for consumers. Trust in the systems by which food is produced and tested is hard won and easily lost. In this, the UK is in notable contrast to Norway, for example, where consumer attitudes were reported positive in relation to the way domestic food was grown and the protection provided by the Norwegian Food Control Authority⁴⁶. For many UK consumers, unquestioning belief in scientific reassurance is now less likely and while this appears contradictory to our generally greater reliance on advanced technology, dissonance is more related to the emergent gap between scientific promise and performance in food production than outright rejection of scientific innovation in all domains.

Consumer Reactions

Consumer reactions to information are often difficult to predict. This is true even for shopping behaviour after food scares have been widely publicised. Some will translate anxiety into changed behaviour immediately, while others will not change either through habit or in consequence of their belief in producer, retailer and government reassurances. Given the widespread association of these problems with industrialised food production methods, UK consumer confidence has been undermined. Processing innovations, such as irradiation to extend shelf life, further challenges this⁴⁷, as does publicity for older, but little known, storage techniques for apparently fresh food⁴⁸. There is evidence of consumer concern about food safety in recent research undertaken by the UK Food Standards Agency but this is not straightforward. Qualitative research indicated that 'within the context of discussion about shopping for food, it was not common for people to raise issues of food safety spontaneously'⁴⁹. However, discussion group participants who were non-meat eaters, and had already made a decision to change their diet from the norm, were 'much more preoccupied than others with the possibility that some foods might be injurious to health'⁵⁰. When the issue of food safety was prompted, underlying confidence 'quickly evaporates if food safety is raised in the context of scares like BSE, salmonella and GM foods. There is widespread suspicion that science is the servant of people – farmers, processors, distributors and marketeers – who are dedicated to improving profit margins and who may not be sufficiently careful about public health'⁵¹. So quite clearly, for these respondents, concerns were there even if they were not a major pre-occupation while food shopping. 'There was a widespread feeling that the general public did not know how food production and processing methods were changing, and what the implications of such changes might be. Not knowing produced a sense of powerlessness; and the public had to accept what was available to buy without knowing much about it, and perhaps especially not knowing how pursuit of profit might be affecting the food industry ... BSE was widely regarded as a discouraging example of the lengths to which food producers might be going to maximise their returns'⁵². This work for the Food Standards Agency was followed up by quantitative research involving 3153 respondents throughout the UK. This provided confirmation of concern about food safety with 71 per cent of the sample indicating they were 'very' or 'quite concerned' about general food safety. Further, when asked about food issues, BSE and food poisoning were indicated by 61 and 63 per cent respectively but substantial proportions were also concerned with the use of growth hormones, the feed given to livestock, pesticide use, GM foods, additive use, the

conditions in which livestock was raised, and antibiotics in meat. Importantly, respondents reported that these concerns 'between two-thirds and three-quarters said it had affected their eating habits'⁵³ but the study did not seek to explore the relationship between this and food shopping behaviour.

Translating Concern into Food Shopping Behaviour

In the UK, environmental concerns and awareness of 'green' issues grew during the 1980s and early 1990s but were never translated into a radical agenda of change. Issues were often adapted by mainstream political parties, consequently losing focus, and were similarly absorbed by food producers and retailers. Arguably, their responses in the form of reassuring labels and packaging were more a public relations exercise than a considered reformulation of products or a rethinking of the way commodities were grown, harvested or acquired. The net effect was a literal 'greening' of supermarket shelves without the underlying process changes⁵⁴. Generic 'green' concerns were thus apparently addressed at the point of sale and relatively few consumers were inclined to pay the additional costs involved in a more substantial response. However, there has been a growing interest in one type of 'green' issue, organically produced food, although there is ambiguity with this as well.

Organically Produced Food

One way to resolve some of the uncertainties is vegetarianism. This avoids problems of industrialised meat or fish production and, perhaps because of the food-related lifestyle change involved, tends to be associated with a renewed emphasis on the 'naturalness' and quality of food. For other consumers, there is an emphasis on purchasing commodities produced by organic methods, and this may include both meat and fish. Organic food production has moved from the margins of agriculture and retail activity to now generate considerable media debate. In a sense the advantages of organic food have long been available but their relevance has been stimulated by perceptions that the problems of conventional agriculture are now sufficiently commonplace to warrant a concerted commercial response. From the shelves of small health food shops since the 1950s, and tentatively by some supermarkets since 1981, organic food has now been added to the range of commodities offered by nearly all large supermarket chains, and over the internet by innovative producer-retailers for urban consumers. However, the most dramatic response was that taken by the UK frozen food company *Iceland*. They had previously moved ahead of competitors by removing 'all artificial colours and flavours from its own-brand products in a move it claims is designed to allay mounting public concern over food safety. The supermarket chain, which was the first to remove genetically modified ingredients from its food, has also said it is planning to sell organic produce at little or no extra cost and introduce... clearer labelling, a reduction in the salt content of its food and the use of identifiable quality cuts of meat in all its processed food'⁵⁵. The organic initiative announced in May 2000, and fully implemented later that year, meant that frozen organic food was readily available at nearly the same price as conventionally produced equivalents. This particular venture failed primarily because profit margins were too low at those prices and sales did not increase enough to offset this⁵⁶. However, this was arguably a tactical failure rather than one of long-term strategy for not only has the former owner of *Iceland* subsequently opened organic supermarkets, rivals Tesco have recently

committed themselves to a stronger emphasis on organic food. Similarly, Co-operative Stores supermarkets imposed an outright ban on 20 pesticides and is asking growers to find alternatives to 30 more⁵⁷. Moreover, while Iceland's specific retail initiative failed, consumer demand for organic products is growing in terms of the percentage of households who buy this produce but there is still a low frequency of purchases, and the amount spent per household is still low in comparison with overall expenditure on food. However, the market is significant. Sainsbury's, the largest UK supermarket retailer of organic food, anticipates sales of £235 million in 2001⁵⁸. The Institute of Grocery Distribution expects the total UK organic market to exceed £1 billion in 2002-2003. Currently, indications are that consumers purchasing organic food tend to be in the upper socio-economic groups; live in two person households; are aged between 45 and 64 years; and the main shopper is not working⁵⁹. This profile shows congruity with that of consumers most concerned about food safety and other food issues⁶⁰. While such households are limited as a proportion of all food shoppers, they are viewed as an important group of customers. Tesco consumer research indicates that 63 per cent of respondents would buy more organic food if it were available. On this basis, Tesco are increasing their range of organic products and cutting the price to make it more accessible to a broader spectrum of customers⁶¹. Clearly, this kind of future commitment is important because supermarkets currently account for around 75 per cent of all organic sales.

However, the organic response to food safety concerns is less conclusive than many customers imagine it to be. To reinforce their confidence, there is an apparently strong regulatory framework to limit use of the term 'organic' except where it meets specific production criteria. There are eight organic sector bodies registered with the United Kingdom Register of Organic Food Standards (UKROFS)⁶². Only one - Soil Association Certification Ltd - is accredited by the International Federation of Organic Agricultural Movements (IFOAM). The Organic Products Regulations Act (1992 amended twice) requires that 'any operator who produces, processes, imports, packs or repacks organic food out of sight of the consumer must be licensed by an approved sector body' ... [and] ... 'to demonstrate that an organic product offered for retail sale has been produced by a certified operator, the product label must display the code of the certification body responsible for the retail packing operation'⁶³. In practice, however, there are problems. European and UK legislation allows more than 30 chemical additives and 'although crops may be organic, the term is no guarantee that they are pesticide-free. Organic crops may be contaminated by chemical residues left in land converted for organic farming or from nearby non-organic farms through air or water'⁶⁴. Research for the Food Standards Agency indicated the perception of most respondents was that 'organic' meant 'foodstuffs like fruit and vegetables had been produced as naturally as possible, without the use of pesticides and without incorporating preservatives'⁶⁵. Not only does this run counter to actual permitted practices, there have been claims that organic crops - grown using manure rather than conventional fertilisers - actually brings increased risks of E coli contamination and food poisoning⁶⁶. Equally, the real advantage of organic produce over non-organic may be overstated. Recently reported research on carrots revealed not only that conventionally grown carrots, organic British carrots, foreign organic carrots were all negative when tested for 40

different pesticide residues known to be associated with carrot production⁶⁷. Similarly, 'organic eggs must meet the best free-range standards with flocks of fewer than 500 birds. Beak clipping is not permitted. Yet only 70 per cent of the birds' diet must be organically produced, although it must be free of antibiotics, animal waste and protein, and yolk-colouring dyes'⁶⁸. However, livestock products labelled as organic in the supermarket may quite legally be produced under 'conversion' arrangements. For organic veal or beef, it is only necessary that 'cattle whose progeny is intended for meat production must be managed in accordance with these... [UKROFS] ... standards for at least 12 weeks before calving'⁶⁹. Organic poultry might come from chickens that have been kept in conditions compliant with the UKROFS standards for as little as 10 weeks; and organic eggs might come from chickens who have been subject to the standards for as little as six weeks. Claims that organic food is 'healthier' have also been challenged. The Soil Association reviewed a number of published research papers and concluded that analysis suggests 'farming methods can make a significant difference to levels of vitamins, minerals and other nutrients'⁷⁰. However, the UK Food Standards Agency takes the view that there is not enough evidence to support this conclusion. Claims and counterclaims pose an interesting case for media handling of scientific opinion⁷¹ but do little to provide clear guidance for the consumer.

Locally Produced Food

The label - organically produced - has a talismanic quality amidst the uncertainties of food safety and environmental impact. As with other labels - pure, fresh, natural, and traditional - the consumer may seek more reassurance from them than they can provide⁷². While there is more protection against misuse of the word organic than for many others used in the same context, it still has the capacity to beguile consumers. Furthermore, it can be argued that the typical consumer profile - upper socio-economic groups, small households, middle aged - distracts from the importance of cheap, conventionally produced food for less well off consumers. Third World food poverty and, less dramatically, the food poverty that exists in disadvantaged sections of our own European population, is not readily reconciled with an emphasis on lower yield production methods⁷³. In this sense, switching to organic production may exacerbate other food-related problems. However, the future of our food might usefully be considered in terms of factors other than organic production *per se*. This does not liberate food producers from the market hegemony of large retailers. Large food retailers are clearly seeking to transpose the power of price, product, supplier and even transportation specification they have in the relationship with conventional, non-organic, food producers to that with organic producers. There is ambiguity here, and many producers would only see the cost and risk of organic conversion acceptable on the basis of secure, large-scale sales prospects. Yet, these are currently available only with supermarket contracts. Arguably, there is a radical agenda to be pursued in the way that food is distributed and sold, not just in the way that it is produced. It is important not to regard organic food production as a proxy for solutions to these problems as well although it is not necessarily inimical.

Coupled with supermarket buying power is an increasing willingness to source supplies nationally or internationally. Distance between producer and store is no longer the primary consideration. This amplifies asymmetry in the producer-retailer

relationship by imposing greater competitive pressure on the former while allowing greater margins for the latter. Food now travels further from producer to consumer. The social and economic costs of 'food miles' were highlighted by the SAFE Alliance and, to a large extent, that criticism^{74,75} related to energy costs and the distortion of third world agriculture for European needs. One of the key recommendations of these reports was to endorse reconnection of local food production and local consumption. Locally produced food, it was argued, should be a priority for consumers, manufacturers and retailers. Indirectly, this may have an effect on the use of chemicals and processes that ensure food stays fresher in appearance longer, but is not a direct appeal for organic production. To focus on the location of production and consumption, rather than the type of production, offers potential benefits the most straightforward of which is the opportunity to reduce 'food miles', and thereby limit the current trend for long-distance transportation of basic commodities. Moreover, it is arguably not in the interests of consumers if local food producers and manufacturers withdraw from the industry in response to supermarket exploitation of production cost advantages elsewhere in the world. In the medium to long-term, this creates political and economic vulnerability from which recovery is difficult, if not impossible, in the short-term. Food production elsewhere is not necessarily of long-term advantage to the country in which it is located, beyond immediate employment opportunities for some⁷⁶. Even within the UK, the balance of food production/manufacture and consumption between regions, and between rural and urban areas, is arguably important to avoid economic disparities and additional distribution activity. Local production, distribution and consumption promote local employment and increase the chance that employment is sustainable. Furthermore, while it is unlikely that consumers would readily accept a reduction in the current year-round availability of so many commodities, greater reliance on local produce would encourage seasonal food use. Arguably, awareness of seasonal produce has been a casualty of modern distribution practices. However, the real advantages of the reconnection of local production and consumption are in danger of being lost in an assumed congruity of 'local' and 'organic'. Re-emphasising local food need not exclude existing large-scale, conventional growers and manufacturers but, equally, might more readily include small operations whether they are organic or not. Agricultural diversity is clearly the only viable direction in the UK. The organic agenda is important in its own right, but it is also a catalyst for change in the conventional farming methods that predominate. For example, 'the increasing use of precision farming to reduce fertiliser and chemical applications and the targeted inputs methods encouraged by Scottish Natural Heritage and the Farming and Wildlife Advisory Group'⁷⁷ are important developments in the context of an on-going demand for food without the organic premium. The sheer scale of demand for food cannot be readily met by the emergent organic sector and, while this is a market to engage with, much of this demand does not benefit UK growers. Currently, *Tesco* imports 80 per cent of its 1000 organic products. Effecting a major change of production methods on a farm, accepting lower production levels in consequence, securing appropriate certification for produce all add to costs and retailer price premiums are, at best, marginally beneficial to producers.

Change in the UK producer-retailer paradigm is probable only if supermarkets change their stance towards locally grown food.

This would be assisted by the development of distribution and retail strategies that were genuinely different from those practised by large supermarkets although the latter are still likely to dominate trading practices because of the size of their market share. Alternatives, such as Farmers' Markets and other forms of direct selling, are not new but are revitalised in the context of consumer concerns and the organic food resurgence. Over the last 50 years, there has been something of a retreat from direct selling with an increasing use of intermediaries and, for much of that period, national marketing boards for specific commodities - for example eggs, meat, milk, potatoes - controlled much of the market. Although there were differences in the control exerted by different boards, direct selling was the province of smaller producers or a marginal activity for others. By the 1950s, direct marketing was being described as 'not extensive' ... [and applicable only to]... 'products which can be consumed with little or no processing after they have left the farm gate and to the produce of farms situated virtually on the consumers' doorsteps - that is near towns or villages'⁷⁸. Access to consumers has undergone something of a transformation in the recent development of Farmers' Markets and internet-based ordering. In many parts of the UK there had been a tradition of food markets primarily for fruit and vegetable retailing but often including fresh meat and fish sales. Sometimes these involved producers directly, but mostly the retailer was an intermediary. Farmers' Markets reduce reliance on intermediaries and have the advantage of taking produce to centres of population. Farm Shops and 'pick-your-own' enterprises, on the other hand, require consumers to make a specific journey to producers, or rely on passing trade. Promoted as a solution to supermarket hegemony⁷⁹, Farmers' Markets offer direct access to fresh food and better profitability for growers. 'It is perhaps ironic that a town which can boast one of the highest ratios of supermarket space per head of population in the country should be one of the few places - so far- in Scotland where farmers have resorted to selling their produce direct to the public in this manner. Stroll among the stalls and you'll find fish farms, nurseries, organic vegetable growers, honey and country wine producers, but it is the livestock farmers who predominate - hill lamb, organic beef, farmed venison and even the exotica of locally reared ostrich and wild boar'⁸⁰. The main advantages for consumers are perceived or real freshness and quality⁸¹. Price advantage is also sought but, in practice, this may be offset by higher quality purchases and organic production costs. Higher prices are also a feature of the retailing format using the Internet for selection and ordering, with home delivery by post or courier service⁸². The direct link between producer and consumer defines both retailing formats, but the local dimension is stronger for Farmers' Markets. There is little to suggest strict uniformity of approach. Edinburgh Farmers' Market, for example, operates with a 100 miles (160 km) radius rule. The UK National Association of Farmers Markets suggests flexibility for large urban areas but states that locality should be evident in whatever definition is adopted, and an overall area much larger than a 30 mile (48 km) radius is unlikely to retain local characteristics. In the UK, Farmers' Markets and Farm Shops remain small-scale innovations and have a symbolic importance greater than their economic impact. The Foundation for Local Food Initiatives, the National Association of Farmers Markets - and many individual licensing authorities - promote markets on the basis of the freshness and quality of

the food. In this there is an implied critique of conventional production although this is not made explicit. 'Producers must produce clear written information about production methods which shall be available to any consumer who requests it. Producers should be encouraged to welcome visitors onto their farm. Markets should for the time being include a policy that no genetically modified organisms are knowingly sold or included in products sold at the market'⁸³. Premium prices, infrequent events and a tendency to offer high quality specialist produce, limit the threat to volume sales but, as shown above, supermarkets are not insensitive to the cachet of 'organic' nor, apparently, to the utility of signalling 'local' produce availability. Supermarkets are now indicating willingness to stock local food⁸⁴. Rather than see this change of emphasis as change of heart; one might argue that supermarkets are making a virtue out of necessity. Public opinion is directed towards our ailing countryside, there is a low-key but growing awareness of the 'food miles' debate but there is also the opportunity to purchase cheaply because of the difficulties. As evidenced by the fact that both *Tesco* and *Safeway* have been trying to acquire a placing in an index of ethically sound organisations⁸⁵, supermarket chains put a high value on customer opinion. Similarly, supermarkets have sought to reassure consumers with the launch of ethical trading and other environmental initiatives. When their buying practices or products attract criticism, they make a point of being seen to positively respond. It remains to be seen whether local sourcing becomes a significant proportion of all purchasing given its current global dimensions. Furthermore, local sourcing will require change in the increasingly centralised distribution strategy that supermarkets are currently using to claim as a reduction in food miles⁸⁶. If not, it is probable that 'local' will be distorted to signify something more than the prescribed radius of many Farmers' Markets. 'Asda sells Scottish beef in its Scottish stores, Cheshire potatoes in Cheshire, Ayrshire potatoes in Scotland and Puffin potatoes in Kent Supermarkets have been building on a local food strategy for some months. Sainsbury's has already recruited 375 local suppliers who provide over 2000 lines to regional stores'⁸⁷. In usage of this kind, 'local' is a synonym of 'regional' and this detracts from advantages of connection between producer and consumer inherent in a more restricted sense of the word. One abuse of the term has been addressed recently. *Scotch* beef has premium quality associations but until April 2002, this could be applied to cattle that had spent as little as 90 days in Scotland⁸⁸. Furthermore, if 'local' becomes more an adjective in the establishment of premium-priced goods than a reflection of truly local sourcing, then there will have been a similar 'control by adoption' strategy to that deployed for organically-produced food. It is, however, significant that local purchasing is once again being mentioned in supermarket press releases, even if there is ambiguity about the operational implications.

Conclusions

In the wake of the recent Foot and Mouth Disease outbreak in the UK, media attention has been drawn to profound economic difficulties in many rural areas. A July 2001 private sector business initiative called *Rural Action*⁸⁹, for example, urged businesses and the community generally to buy their food locally in order to boost farm incomes, stimulate all aspects of rural economic life and reduce rural unemployment. Equally, the UK Government's Countryside Agency is promoting the retention

of local buying power based on market research into the multiplier effect of rural business activity. Local businesses retain more consumer spending in the community than do local branches of national or international companies⁹⁰. Similarly, in August 2001 the UK Government appointed a policy commission to 'advise the Government on how we can create a sustainable, competitive and diverse farming and food sector which contributes to a thriving and sustainable rural economy'⁹¹. One of the many recommendations in the commission's report was that public bodies should not just try to promote healthier eating through their procurement policies but should give serious consideration to the benefits of purchasing locally produced food. 'The development of local food distribution networks is encouraged by the critical mass purchasing that public bodies can deliver, thereby allowing cost effective distribution into other local outlets as well'⁹². The call for this kind of indirect market intervention is an innovative departure in the UK but not uncommon elsewhere in Europe. If supermarkets were to source more commodities and food products locally then, not only would there be benefits in terms of reduced food miles and less distortion of overseas agricultural systems, but there would be an opportunity to limit rural job loss and rural community reoccupation as dormitories for urban economic activity. Already the encroachment of towns has altered the social composition of rural areas⁹³, but the real damage occurs when this also tends to undermine local economic activity rather than stimulate it. After the sequence of agricultural disasters that have simultaneously reduced consumer confidence in food production, and closed down a number of rural businesses, UK agriculture is vulnerable. Conversion to organic production has appeal because there is increasing demand, but the costs are not readily offset against substantially higher incomes from supermarkets⁹⁴.

Paradoxically, the alternative - direct selling - works well on the margins but long-term sustainability needs the demand that can be generated by larger food retailers. Supermarkets hold the key to the future of UK food production but, on present reading, their purchasing power would be better focused on place of production - i.e. local - rather than on the narrower issue of how food is produced - i.e. organic. Both are important, but the diversity of UK agriculture is under threat because producers are not in a position to simultaneously accept higher costs and lower prices on food from lower productivity systems. That said, not only is the Soil Association urging shoppers to 'buy from their local farmers' markets, organic delivery service or farm shop and schools, hospitals, restaurants and other businesses are also being encouraged to use local fruit, vegetables and meat whenever possible, instead of relying on imports or food that has travelled across the UK'⁹⁵. Finally, shopping for safe food is increasingly a consumer problem although some consumers will be more able than others to exercise choice in problem resolution. For some, insecurities may be reduced by opting for organic produce wherever possible. However, the advantages are neither clear cut nor cheaply obtained. Strengthened certification rules - such as those launched recently in the UK⁹⁶ - might help consumers ensure they are actually buying the safety they perceive in organically labelled food. However, reliance on overseas suppliers inevitably brings uncertainty back into the equation. International standards are hard to agree and even harder to apply. While there is such a high proportion of organic food imported for supermarket sales, domestic certification can have only a limited effect in restoring

consumer confidence. While organic food may also be local food, to a large extent it is not. Most supermarket fresh produce is sourced internationally. The real answer to a restoration of confidence would seem, therefore, to depend on a renewed acknowledgement of the importance of local food. Not only would this increase certainty about the standards applied to organic produce, it would produce two major subsidiary benefits.

*Culturally, an urban society that loses touch with its rural hinterland is in danger of dysfunctional *hubris*. The recent UK Foot and Mouth Disease outbreak demonstrated the gap that now exists between people with an urban orientation – even if they live in the countryside – and those who not only live but also work in a rural context. Perhaps belatedly, this is now reflected in recent initiatives from private and public sector. Arguably, selling and consuming food in the locality where it is produced is more exceptional than it should be. Concerted efforts are needed to ensure not absolute local sustainability in food production – that is already beyond the grasp of consumers with raised expectations – but a substantially stronger relationship between town and local food producers even if that production is conventional rather than organic.

* The escalating problem of food miles – the distance food travels to the consumer – is serious and unsustainable in the longer term. While not denying the importance of international trade for all, economic differentials between producer and consumer societies ultimately weaken importer capacity for self-sufficiency. Nowhere does this matter more than for food production. The answer resides not in denial of international trade but in robust stewardship of the domestic capacity to grow and sell food.

The Foot & Mouth Disease outbreak has the potential to be a turning point in relations between UK producers and consumers. Media images of that prolonged tragedy may now be fading in urban minds, but private and public sector initiatives to help rural recovery might yet be longer lasting. Calls for shops to sell locally produced food give symmetry of purpose – if not of fine detail – to the organic lobby, the business sector and the UK Government. The Institute of Grocery Distribution's recent survey of consumer attitudes to food purchasing indicated 59% of respondents were interested in locally-produced foods and that, ... 'local foods offered an additional attractive quality by enabling them to support the local community, but this would always be balanced against the extent to which the product met their needs in all other areas'⁹⁷. Quality, appearance, cost and product availability remained important limiting factors in the translation of this interest into actual shopping behaviour. The auguries for improved sustainability are encouraging especially in the context of continued food quality uncertainties, but it may elude us yet unless consumers are also committed to the change agenda.

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