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# Briefing Paper

## Communities Module

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Note. This paper is a position paper designed to present the case for increased scrutiny and benchmarking of supermarkets' policies and performance in relation to their impacts on the local economy and local communities, and to present methodologies for how that benchmarking may be carried out. It is written by the coordinators of the Communities Module and does not necessarily represent the views of members of the alliance of organisations involved in the Race to the Top project, or the project's Advisory Group. It is a working document which is being regularly updated.

### Introduction to the 'Race to the Top' project

### Why is this project needed?

Questions are increasingly being asked about the integrity and safety of our food, the impact of its production on the environment and animal welfare, and the fairness of trade between consumers and workers along the food chain. In the UK and across Europe, there is an opinion that society should be much more directly involved in setting the farming and food agenda, rather than leaving it solely as the domain of government policy and market forces.

Supermarkets exert a huge influence on the rural economy in the UK and overseas, by setting farming standards and by seeking ever greater efficiencies for customers, competition and shareholder value. Their product range and siting policies affect the health of our communities and the environment. Customers trust the supermarkets to look after the environment and be good corporate citizens.

## How will Race to the Top work?

The aim is to track the social, environmental and ethical performance of UK supermarkets, and catalyse change within the UK agri-food sector and beyond. An alliance of farming, conservation, labour, animal welfare and sustainable development organisations has developed several indicators of supermarket performance. These will provide comparative data to track progress towards fairer and greener food over the next five years.

By identifying and promoting best practice by supermarkets, the project will point to key issues for public policy, consumers, investors, retailers and campaigners. It will also provide objective data and analysis. An advisory group of independent experts provides advice and quality control.

There are seven groups of indicators:
- Environment
- Producers
- Workers
- Communities
- Nature
- Animals
- Health

Race to the Top will benchmark the major supermarkets annually using these indicators, and publish the results along with case studies of best practice by supermarkets and their suppliers. The RTTT project allows a consolidated, constructive relationship between civil society and supermarkets, rather than the single-issue action-and-reaction dynamic that has characterised civil society scrutiny to date. The project explores the boundary of corporate responsibility, the role for legislation, and responsibilities of consumers.

This briefing paper covers the **Local** module and pertains to the **local community and economy**. Other briefing papers are available which describe the other modules. Each seeks to identify the key issues within the module, and what actions UK supermarkets can take on these issues. There are many other issues which could be included within each module, but those identified are considered by the Race to the Top alliance of organisations to be highly significant representative issues on which retailers can act. Each of the issues is accompanied by an indicator that will be used to track positive supermarket action. It is hoped that these indicators will help to track supermarket progress towards a fairer and greener food system, and that they will provide a basis for discussion on how further progress towards this goal can be achieved.

## Regional sourcing and the local economy

### Introduction

The underlying basis for this module is that supermarkets should contribute to rather than detract from the local farming and food economy and the local community through greater emphasis on local and regional rather than national sourcing of goods and services where appropriate and feasible, and redefining the role of the store as one which assists wealth to circulate and multiply within communities and regions. This module does not address the environmental impacts of transport related to supermarket distribution systems (see transportation element of the Environment module). The Policy Commission for the Future of Farming and Food ("The Curry Commission") concluded that local food will be the next major development in food retailing, and that the supermarket sector should re-examine its supply chains accordingly.

The restructuring of supermarkets in the 1980s saw more than just the growth of out-of-town superstores,[i] it saw the growth of the multiples' power in the food chain. The five largest supermarkets now sell 70% of food in the UK.[ii] Retailers' sourcing strategies can therefore have significant impacts on the local economy and the viability of suppliers, particularly small-scale producers and growers. Coupled with increasingly streamlined accounting systems as well as centralised purchasing and distribution (suppliers deliver to regional warehouses), their huge market share has given the large supermarkets the ability to side-step wholesale markets and purchase direct from the supplier.[iii] They have worked to reduce the number of suppliers they deal with and are now able to plan and control supplies and specify to growers exact specifications, delivery times and quantities.

The rise of the multiple has brought considerable benefits to many consumers, particularly the convenience of choice from a large product range under one roof. However, in identifying and satisfying consumer preferences so effectively, and therefore increasing their market share, supermarkets have also brought some negative impacts including concentration in the food sector, particularly in fresh produce; a major decline in specialist, independent stores (butchers, bakers, greengrocers, etc); and a decline in the availability of local/regional produce. This module explores how deliberate, positive action by supermarkets, which takes into account local needs and conditions, and places more custom with local businesses - especially food suppliers - could have a strong and positive effect on local economies.

The recent Mintel report investigated the popularity of local produce among UK consumers, examining attitudes and practices towards British food in general, and towards buying local/regional produce. This the first time Mintel has dedicated a report specifically to this subject, a reflection of the growing level of interest in local sourcing.[1]

The Mintel survey revealed that British shoppers have a strong preference for locally grown and/or British produce. Half of those surveyed claimed that they try to buy British when shopping for fresh meat; 44% look for British fresh fruit and vegetables; and 31% prefer British fresh fish. In addition, 23% said that they are buying locally grown produce through farmers markets. A similar proportion said that they like to support the local economy by buying local produce and that they believe such produce is inherently fresher.

The Mintel survey revealed considerable frustration among consumers who said they are unable to buy British when they want to because the produce is not stocked by their retailer. Almost a third (30%) complained that British produce is not always available; one fifth (21%) blamed supermarkets for not stocking enough British-grown fresh fruit and vegetables, and 11% claimed that these same retailers do not carry enough fresh British meat.

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[1] Cranfield School of Management for DTLR, DTI and Home Office: *Supply Chain Vulnerability: Final Report*, Cranfield Institute, 2002

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## Losing the local and regional food supply

With their large purchasing and marketing power, supermarkets have out-competed smaller independent stores. From 1980 to 1994 the percentage of food sold by independent retailers fell from 31 per cent to 22 per cent. Over the same period, the number of independent retailers declined by 25 per cent, with numbers employed declining by 35 per cent. Villages and market towns lost half of their small shops between 1991 and 1997.[iv]

Supermarkets' quest for easily transportable, cosmetically attractive, and broadly acceptable produce has favoured the cultivation of uniform varieties, and the production of uniform foodstuffs over the more locally distinct, quirky and genetically diverse varieties that prevailed as part of former farming practices and food traditions.

It is commonly argued that the benefits gained from the prevalence of smaller independent food stores can include:

- promotion of local diversity/food culture;
- fresher produce;
- boosting the local economy by supporting local businesses and therefore jobs, and indirectly, other businesses (the multiplier effect).

This module seeks to explore how multiple retailers could achieve these benefits through changing the way they manage their sourcing. The local sourcing debate often centres on the merits of direct sourcing. However, significant downsides to sourcing direct from suppliers include:

- variable and unknown quantities and qualities of produce;
- possible losses of quality in local operations that cannot match the highly 'efficient', climate controlled national systems; and
- possible increases in food miles (the distance food travels from producer to consumer) if the system is not efficiently organised and coordinated.

Supermarkets argue that to operate due diligence, and achieve the required volumes and quality control, they must have a centralised system of delivery. In general, store managers of the multiples are not responsible for orders and therefore have no control over local supply, although in some cases store managers are able to suggest local suppliers who they would like to use, who are then subject to central management and procedures. In *Local Sourcing*, the recent briefing by the Institute of Grocery Distribution (IGD), some pointers are given which include the potential for assisting suppliers, for instance, in providing advice, produce pick-ups, or connecting them with other suppliers to help share costs.[v]

## Supermarkets and the local economy

As supermarkets have gained market share from independent and specialist stores, the wider local economy has been affected. Whereas a local store would probably use a local printing shop or firm of solicitors, a major multiple is likely to use national services contracted centrally. Food retailing employs 4% of the national workforce. According to the BRC, in 2001, 72,700 net new jobs were created by the retail industry, 68% of the net new jobs across the economy as a whole.[vi] Yet one estimate suggests that less than 16% of supermarket turnover translates into local wages, purchases and services.[vii] The same study found that every £10 spent with a local food initiative is worth £25 to the local economy, compared with just £14 when the same amount is spent in a multiple supermarket. The same amount is worth more with local schemes as it stays in the vicinity, where its value increases as it is reinvested many times over.[viii] This is often referred to as the multiplier effect.

The focus of this module is primarily on supermarket sourcing of local and regional food. Supermarkets' annual spend is primarily on purchases and on labour. Annual reports show that they spend a far higher proportion on their purchases than on labour, and the bulk of those purchases are food products. It therefore makes sense to focus on the food portion of supermarket spending as a way to assess the impact they have on the local economy.

Other forms of local food supplies, often referred to as 'local food links' have been gaining an albeit small market share. These include vegetable and fruit delivery schemes, direct mail and delivery schemes, community supported agriculture, farmers markets, and community food initiatives such as consumer buying cooperatives (see case study below). Studies in the UK and the US suggest that increasing such initiatives would have a positive local economic and environmental impact. It is therefore important to compare the relative merits of this approach with an increase in local and regional sourcing by the supermarkets.[ix]

## Case study: Local food links[x]

Farmers Markets – A comparison could be made with farmers' markets, which offer food that is locally produced – they are described as 'the British farming industry's most high-profile shop-window'. A Farmers' Market is one in which farmers; growers or producers from a defined local area are present in person to sell their own produce, direct to the public. All products sold should have been grown, reared, caught, brewed, pickled, baked, smoked or processed by the stallholder. National Association of Farmers' Markets Criteria interpret the radius from the market as generally being used to define "local": 30 miles from the market would be a typical definition. The actual distance depends on circumstances and on the consumers' own perception of "local". Information on the market's policy and stallholders should also be readily available.[xi] Customer surveys show that the public are keen to support their local producers and 400 farmers markets are now supplying regional and local food to customers on a regular basis. Some supermarkets, notably Asda, are now running farmers markets on their car parks on a regular basis. These would score highly in terms of use of local suppliers, promotion of local and seasonal, and returns to local economy.

Independent stores – Studies have shown that small independent local stores are likely to use more local suppliers and have a significant multiplier effect on the local economy.[xii] It has been estimated that the rate of closure of small shops is costing local economies about £550 million per year as a result of the lost 'multiplier effect.[xiii]

Farmers diversifying - In Wye, Kent, a project, co-ordinated by WyeCycle, ensures that food produced locally is marketed at farmers' markets and through box schemes and local wholesalers, which minimises food transportation and packaging. Farmers have responded to strong demand by diversifying to ensure that demand is met with adequate supplies.[xiv] The aim of diversification is two-fold – an increase in the number of different foods and varieties of each, and the provision of food throughout the year. One farm in the region can now supply a range of fruit and vegetables all year round. It offers over a hundred different varieties of apples as well as a selection of plums, pears, cob nuts and other fruits and vegetables.[xv] An additional idea being developed is for 'Superfarmers' – high street stores supplied direct by local producers with addition space for dry and household goods - to compete with supermarkets directly.

Direct marketing - this is another comparable retail operation. Approximately 40,000 households in the UK receive a box of organic produce, delivered to their door or nearby each week. The largest box scheme, Riverford, based in Devon, delivers 3500 boxes of organic vegetables per week. West Devon Environmental Network found that there was a massive demand for local organic produce, which far exceeds the available supply. They have estimated that if local producers met this demand it could add £4.9 million to the local economy every year, and create at least 61 new jobs.[xvi]

The independent local food sector in Devon, Somerset and Dorset includes 900 businesses involved in food production, processing, wholesaling, retailing and catering. The farms employ an average of 3.4 full time jobs, compared to an average of 2.34 full time jobs for the South West as a whole, meaning that in all there are 954 more jobs in agriculture. On average these businesses spend £30,000 per year in the local economy, a total of £27 million per annum.[xvii] A Campaign for the Protection of Rural England (CPRE) report presented quantitative evidence of the detrimental impact of an out-of-town store on farmers, local stores and employment in Suffolk. It showed that complex local networks of supply and demand would be destroyed by a new superstore, and with it, jobs, shops and wholesalers.

In relation to local jobs, a 1998 National Retail Planning Forum report showed that, on average, when a superstore opens, 276 full time equivalent jobs disappear, as a result of closure of food retailers, and subsequent effects on suppliers and nearby non-food retailers. Government research in 1998 showed that out-of-town or edge-of-centre supermarkets have resulted in disinvestments in market towns and district centres. This has lead to a decline in market share of principal food retailers by 13-50%.[xviii] In their defence, the supermarkets argue that their superstores are beneficial to local communities, creating jobs and 'clawing back trade'. Over 470,000 people are currently employed by the Big Four, and in 2000 they pledged to create 28,000 jobs.[xix]

## Multiples changing to local?

As a result of recent food scares, increased demand for local food and concern about food miles, there has been considerable pressure in the last two years for multiple supermarkets to source their products and services more locally. There are five perceived benefits associated with this:

a. to renew the relationship between producer and consumer;
b. to strengthen local economies and reduce 'leakage' of both finance and other resources (including labour and nutrients) from the local economy;
c. to create opportunities for more secure and sustainable food supplies;

d. to improve relationships with local authorities and citizens e.g. to facilitate planning decisions, and
e. to reduce the environmental impact of complex, lengthy distribution patterns of food.[xx] (See Module 1: Environment for more on this issue).

The last three years have seen a plethora of policy announcements and initiatives by the main supermarket chains on local sourcing. Whilst such initiatives are relatively young, there is some evidence that there could be some discrepancy between rhetoric and reality of store sourcing.[xxi]

The move to encourage supermarkets to buy and sell local does have implications for local independent food initiatives, some of which are negative. They could both reduce the availability of local produce and lessen the main marketing advantage of local food initiatives. However, in recognition of the fact that supermarkets are now the primary food supply for the majority of households, it is suggested that positive results could be gained from a supermarket policy of sourcing and promoting more local produce. Use of local services could also have a big impact by recycling money within the local economy, i.e. 'plugging the leaks'.

We would hope to see decentralisation of purchasing decision-making, combined with the development at Head Office of a local and regional sourcing policy. Supermarkets should invest some time into developing a framework to implement local sourcing, which may mean considering where they could give more autonomy to local or regional managers to buy direct when in season and when practical. They could also develop training schemes for suppliers and supplier groups on delivering quality and quantities of products direct to store. Larger food retailers are making links with new farmers and those wishing to acquire business skills through the IGD's Small Business Mentoring scheme. The Masterclass course sponsored by Tesco at the Harper Adams University College is an example of one company's initiative to help inform new and upskilling farmers.[xxii] In the long term, it should be possible to organize operations differently so that regional distribution centers act as depots for regional, rather than nationally distributed produce, so that more produce can reach the stores without leaving the region.

In summary, the arrival of a new supermarket tends to reduce employment and financial flows within the local economy. Deliberate action by supermarkets, which takes into account local needs and conditions, and places more custom with local businesses - both suppliers and service providers - could have a strong and positive effect on local economies. A change for the better will require greater emphasis on regional rather than national distribution patterns, and on redefining the role of the store as one which assists wealth to circulate and multiply within communities and regions.

## Indicators

The issue of local sourcing is relatively new. We are currently looking for evidence of commitment to the issue through company policy and the extent to which these policies have been successful. Three indicators are used in this module, to assess the level of support provided by supermarkets for the local economy.

The three indicators currently used are:

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1. Company policy on sourcing food 'locally' and 'locality' foods, and on promotion
2. Extent of local and regional sourcing and promotion
3. Extent of local and regional sourcing and promotion - store shelf survey

In future years, depending upon the ease of data collection and the standardisation of reporting procedures, other indicators may be added.

Verification will also be done through looking at company policy documents and any available independent data on local/locality sourcing by supermarkets and local/locality suppliers to supermarkets.

# Indicator 4.1

## Issue: Support for the local economy

## Indicator: Company policy on sourcing food 'locally' and 'locality' foods

- Case study: Booths supermarket
- What could retailers do about this issue?
- How this indicator will be measured

There is considerable ambiguity in the available literature and publicity about definitions of local versus regional and national sourcing. There is also ambiguity over whether local produce is actually transported to central distribution depots and then returned to the local store.[xxv] The following four criteria can be used for assessing how local/regional the produce is:

- *Source*: Identification (with verification) of the farmer/supplier from within a defined locality
- *Distance*: Description of the distance the food has travelled (e.g. farmers markets definition of within a 30 mile radius)
- *Distribution*: Description of the degree to which the product is stocked across the store network, say a region or county.
- *Seasonal*: Seasonal and locally distinctive products at appropriate times.

A survey carried out by CPRE in 2002 questioned 10 supermarkets chains about their policy on local foods, and found that all ten appeared to recognise local food as a sector with potential, and most said they wanted to increase the amount of local food they sold. Some had targets in place, and most said they wanted to increase the number of locally and regionally produced food lines. However, food from clearly identifiable but large regions such as Wales, Scotland and Northern Ireland, and to a lesser extent the south west and south east, dominates much of what is considered by supermarkets as 'local food'.[xxvi]

The Mintel survey published in January 2003 shows that, when it comes to locally grown fruit and vegetables, 14% of consumers claim not to know where to obtain such local produce.  This is due in part to a shortfall of information, labelling etc by retailers. It may also be due to a lack of effective advertising by local fruit and vegetable producers, which retailer could help to remedy.

Recent consumer research by the IGD also reveals a demand for locally sourced foods in supermarkets. IGD asked 1,000 consumers what changes they would hope to see at their local supermarket over the next year. 15% of respondents said that locally produced foods made available at the supermarket would make their shopping better in the coming year. This was the third priority after price and promotions, and scored more highly than ‘more information on packaging’, ‘food that is easier to prepare and cook’ and ‘methods of production’. [2]

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[2] IGD Consumer Tracker (part of Consumer Watch), February 2003, IGD.

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## Case study: Booths supermarket

It is worth looking at one small supermarket chain which has made a clear policy of sourcing a large percentage of its produce from within a defined region. Booths has 26 stores and is based in four northern counties: Lancashire, Cheshire, Cumbria and Yorkshire. Promotions are often based on regional foods, stressing the provenance, variety and quality of regional foods.

In terms of the number of suppliers it works with, Booths sees its approach as different from the other multiples. It sees dangers in the trend towards ever fewer and bigger suppliers (part of the drive towards 'efficient consumer response' using 'category partners' to manage the supply chain). It maintains a large supplier base in order to maintain choice for the company and for customers, and has built up strong links between buyers and suppliers. Some buyers have been working in the same product area for many years, whereas the average turnaround for many buyers working in the multiples is just nine months.

The effort Booths makes in promoting regional produce is significant and they see this as a key element in their promotions and marketing strategy. As with other multiples, few lines are supplied direct from suppliers to store, however the company does source 20-25% of produce from the four counties. It approaches quality assurance at the store end and store managers are tasked to assess produce at the back door and send back unsuitable produce. This means that store managers are knowledgeable on quality and other assurance areas. In terms of general support to the local economy, Booths is little different from other multiples as its purchasing is centralised.

Booths provides a useful example of how supermarket chains could operate by keeping a strong local or regional identity, reducing the flow of produce into and out of regions, and allowing more store autonomy on produce assurance.

## What could retailers do about this issue?

The ideal supermarket would provide a window on local agriculture by achieving high levels of support for regional foods and local economies. To further the development of local sourcing customers need to be with well-presented, accurate information and guidance. Leaflets currently available have been informative, such as the Tesco's *Local* leaflet, yet are often ambiguous. In addition, in-store promotions of local produce are infrequent and often misleading.

There is, however, an increasing commitment shown by the major stores, in particular Sainsbury's, to label county of origin and farm addresses, mainly on 'speciality' foods like cheese. Given the huge educational role supermarkets now play, such initiatives and wider promotions can help generate increased consumer awareness of local producers. We would hope to see supermarkets using the whole range of promotional options to generate interest and involvement by the customer. This could include:

- in-store point-of-sale displays,
- innovative labelling,
- articles in customer and staff magazines,
- IT and web site information,
- advertising promotions, and
- in-store actions such as meet-the-producer events.

We would want to see consistency in approach and a real commitment to increase promotion and reduce ambiguity. A further approach could be for supermarkets to set targets for selling produce and for developing a code for promotions which ensures consistency, accuracy and comprehensibility and which follows the above criteria for defining local/regional produce.

Ideally, each company would implement a policy, with board level support, of sourcing and selling locally, based on the four criteria suggested above for assessing how local/regional the produce is. This policy would be implemented by adopting targets for local and regional produce with minimal reliance on unseasonable imports. Overall the company would have a high percentage of goods sourced locally and regionally compared to nationally and imported. It would be continuously seeking to increase that percentage by developing new lines and delivery operations with producers, and undertaking market research on the products in demand. There would be special provision for the needs of 'small and developing' suppliers. The company would also assist in developing local producer capacity by providing selling or storage space to local co-operatives and sharing customer marketing information to generate ideas on local food needs.

Logistics systems would be greatly modified to handle local/regional sourcing. For instance, the operation of Regional Distribution Centres would be modified to increase the proportion of stock circulated within the region compared to stock for national distribution. Each branch would have a commitment to source directly from neighbouring farms and businesses when produce is available/in-season. Meet-the-buyer events would be run at a local level to discuss possible new products and long term diversification. Suppliers would be trained to meet standards complying with due diligence requirements.

## How this indicator will be measured

A questionnaire will be used to identify whether supermarkets have made an initial commitment to supporting local economies through their official policies. This will be the basis for assessing and comparing progress in the following years. The questions acknowledge that different supermarkets may be using different definitions, and focuses attention on the need for a common set of criteria to be established and used as the basis for future work.

The questions will ask how retailers define 'local' and 'regional/locality' food products, and what policies they have on sourcing these. They will ask for information on targets, on the promotion of local/locality foods, and on the level of discretion local store managers have to identify and recommend sourcing of local food products.

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# Indicator 4.2

## Issue: Support for the local economy

## Indicator: Local and regional sourcing and promotion

- What supermarkets could do on this issue
- How this indicator will be measured

This indicator seeks to give some indication of the degree to which the supermarkets succeeded in putting their policies into practice during the last financial year. Recent surveys conducted by other organisations provide some useful insights into the current situation at supermarket head office and store levels. Some of their findings on supermarket performance with regard to local food sourcing are presented below. These examples indicate that the awareness of local food as an issue exists, but that there is a long way to go before it becomes an everyday component of supermarket food supply.

When Friends of the Earth surveyed the major UK supermarkets across the country in the autumn of 2001 to find out where their apples and pears were sourced, they discovered that most UK supermarkets obtain the majority of these fruit from abroad. This was in spite of a bumper British harvest of apples that year. The survey found that even less of the organic fruit was home-grown.[xxvii]

A survey of supermarkets in Nottingham carried out by Nottingham Friends of the Earth published in June 2002 found that most supermarkets seemed to regard 'local' as meaning 'British' or 'produced in the UK'. Few actually sourced produce locally (from within 30 miles or even from within the region) except on occasion for certain speciality items such as Melton Mowbray pies.[xxviii]

## What supermarkets could do on this issue

Overall the ideal company would have a high percentage of goods sourced locally and regionally compared to nationally and imported. It would be continuously seeking to increase that percentage by developing new lines and delivery operations with producers and undertaking market research on the products in demand. Nationally there would be several staff dedicated to developing local and regional brands. There would be special provision for the needs of 'small and developing' suppliers.

The supermarket would have a code of practice for promotion of regional/local food products and this would be available for customers to read and comment on. Each store would have the opportunity and resources to run regional/local promotions each year, based on local knowledge of available produce. Information would be provided about buying produce at its seasonal best and on the impacts of buying imported produce. The store would also ensure that its own promotions did not undermine the viability of local produce in local stores and outlets, for instance, by undercutting prices.

### How this indicator will be measured

This indicator seeks to enable monitoring of supermarkets' progress in this area over the next five years. Retailers will be asked to provide information on the percentage of all food lines sourced as ‘local’ to the store, and the percentage of all food lines which were ‘locality’ foods from UK regions. They will be asked about their promotions for 'local' and 'locality' foods, and about the number of their staff that are responsible for helping the company and individual stores to source 'local' and 'locality' foods.

# Indicator 4.3

## Issue: Support for the local economy

## Indicator: Company policy on sourcing food 'locally' and 'locality' foods – store shelf survey

This indicator seeks to gather information to verify data provided in response to Indicators 4.1 and 4.2. Data for Indicator 3 will be collected from a store shelf survey to be carried out in a number of locations around England and Wales during the summer. The survey will assess the number of food lines sourced locally for a selection of products (particularly apples, potatoes, cheese, fresh beef and fresh lamb). The survey will record the number of stores with ‘local’ and/or ‘locality’ food promotions, and ‘mystery shoppers’ will also seek information in stores about local products.

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[i] over 25,000sq ft

[ii] Food Miles: still on the road to ruin? Sustain 1999 IGD Issues December 2000 Market Share figures, Press release 3rd Dec 200, Institute of Grocery Distributors.

[iii] Jo Foord, Sophie Bowlby and Chrstine Tillsley, 'The changing place of retailer-supplier relations in British retailing' Retailing, consumption and capital, Neil Wrigley and Michelle Lowe (editors) (Harlow: Longman, 1996); J. Frances and E. Garnsey, 'Supermarkets and suppliers in the United Kingdom: system integration, information and control. Accounting, organizations and society 21: 591-610 (1996)

[iv] University of Nottingham Business School, Neighbourhood Shopping in the Millennium, October 1998.

[v] *Local Sourcing*, IGD/Rural Action/Business in the Community, 2001

[vi] BRC Sub SUBMISSION TO THE POLICY COMMISSION ON THE FUTURE OF FARMING AND FOOD

[vii] NEF Cusgarn Organics Local Money Flows, Tim Boyde, 2001. A New Economics Foundation (NEF) study has shown that money spent on locally-produced food generates almost twice as much income for the local economy as the same amount spent in a typical supermarket. The finances of a Cornish vegetable box scheme, Cusgarne Organics, based near Truro were tracked in a survey. The study followed the trail of income to monitor exactly where its turnover was spent, how much of it was spent locally, what happened to this money at the next level of spending and so on.

[viii] Local food better for rural economy than supermarket shopping. News Release, Caroline Hill, New Economics Foundation, August 2001.
[ix] Eating Oil, Sustain 2001 and Food, fuel and freeways, Leopold Center for Sustainable Agriculture, US, 2001…
[x] Local food schemes also include Urban Agriculture. For more information see the websites of Sustain at www.sustainweb.org; The Foundation for Local Food Initiatives at www.localfood.org.uk and the Food Futures and Local Food Links programmes run by the Soil Association at www.soilassociation.org.uk.
[xi] NAFM Website
[xii] see Food Webs, CPRE 1988
[xiii] Local Food in Britain: a research review for CPRE, November 2001, CPRE
[xiv] Changing Places. BBC Radio 4, 24/9/2001.
[xv] Memorandum by WyeCycle (DSW 05). Submission to the Select Committee on Environment, Transport and Regional Affairs, September 2000
[xvi] Elm Farm Research Centre Bulletin March 2001
[xvii] Local Food Links in the South West of England. Charles Couzens, Emma Delow and Sarah Watson, f3 - The Foundation for Local Food Initiatives, November 2000.
[xviii] DETR. 1998 The impact of large foodstores on market towns and district centres. DETR, 1998, London
[xix] 'Supermarkets expand' The Times Business News 11th January 2000
[xx] See Eating Oil: food supply in a changing climate, Sustain December 2002
[xxi] Local Food Sourcing - PR or reality? Internal report by Sustain, 2000
[xxii] BRC Submission to the Policy Commission on the future of farming and food, 2001