



Issue: **Support for the local economy**

Indicator: **Extent of local and regional sourcing and promotion**

A **store shelf survey of local and locality foods** stocked by retailers - focusing on apples, potatoes, fresh milk, pre-packed cheese, fresh beef and fresh lamb - was conducted by Sustain and the NFWI. The final survey sample for **Asda** consisted of 8 stores. This sample was smaller than desired, and had a more limited geographical coverage than desired, thereby reducing the extent to which the store survey findings can be taken as representative of the retailer's overall performance in terms of local sourcing.

In terms of actual stocking of local and locality foods, Asda scored well, in comparison with other retailers. This result needs to be considered in the context of the relatively large size of Asda stores, which allows them to stock a wider range of food lines, which allows them to stock a wider range of food lines, including in theory more local and locality varieties, than smaller stores such as the Co-op.

Only one Asda store (13%) had information leaflets for customers on local food, and none of the stores surveyed had any special in-store displays for local foods. None of the Asda stores had any local apples in stock, 38% had local potatoes, 38% had local milk, and 38% had local cheese. Only 13% had local beef and 25% had local lamb.

Far more Asda stores stocked locality varieties of these products: 38% stocked locality apples, 63% stocked locality potatoes, 75% stocked locality milk, 100% stocked locality cheeses, 75% stocked locality fresh beef, and 50% stocked locality fresh lamb.

On average the number of different varieties of the selected local products stocked in Asda stores was between one and three. For locality varieties the average numbers tended to be higher. For locality apples the average was only 2 varieties per store, but for locality potatoes it was 4.4. For locality milks the average was 1.8 varieties, there were about 8 varieties of locality cheese per store, about 4 varieties of locality fresh beef and 4 varieties of locality fresh lamb per store, in those stores that stocked any locality varieties of these products at all.

To score more highly, far more in-store information on local food to consumers would be provided, local and locality foods would be stocked in more stores, and a larger number of varieties of these foods would be available for customers to choose from.



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A store shelf survey of local and locality foods stocked by retailers - focusing on apples, potatoes, fresh milk, pre-packed cheese, fresh beef and fresh lamb - was conducted by Sustain and the NFWI. The final survey sample consisted of just 4 stores. This sample was smaller than desired, and had a more limited geographical coverage than desired, thereby reducing the extent to which the store survey findings can be taken as representative of the retailer's overall performance in terms of local sourcing. The small size of this particular sample was partly due to the fact that many **Co-op** stores around the UK are independent and have sourcing policies that differ from those of Co-op branches under the direct management of the Co-operative Group. At the request of the Co-operative Group, these independent Co-op stores were therefore excluded from the survey at the outset.

In terms of actual stocking of local and locality foods the Co-op gained the lowest score of the three participating retailers. This result needs to be considered in the context of the smallness of the sample size, and also bearing in mind the sizes of the Co-op stores, which may have been generally smaller than the Safeway and Somerfield stores surveyed.

None of the Co-op stores surveyed had information leaflets for customers on local food, nor any special in-store displays for any local foods. None of the Co-op stores included in the survey had any local varieties of the six foods selected for inclusion in the survey. None of the Co-op stores had any locality apples or locality lamb either, and only one had locality beef. 50% of Co-op stores surveyed (ie 2 stores) stocked locality potatoes, 50% stocked locality milk, and 50% stocked locality cheeses. The average number of different varieties of locality products stocked was also small: 1.5 varieties of locality cheeses, 1.75 varieties of locality potatoes, 1.75 varieties of locality milks, and 3 varieties of locality beef cuts.

Thus the Co-op store survey results suggest that the company's policies on local sourcing are not being translated into good performance. This may also reflect the fact that 2 of the 4 Co-op stores included in the survey were located in major cities (Cardiff and Newcastle), which tallies with the Co-op's policy of stocking more local products in market towns than in urban areas, due to greater consumer propensity to buy local products in market towns. However the results for the Redruth, Cornwall store and for the Peterborough store were also low.



tracking supermarket progress towards a fairer and greener food system

2003 company profile: Iceland

Module 4: Local Economies

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A **store shelf survey of local and locality foods** stocked by retailers - focusing on apples, potatoes, fresh milk, pre-packed cheese, fresh beef and fresh lamb - was conducted by Sustain and the NFWI. The final survey sample for **Iceland** consisted of 6 stores. This sample was smaller than desired, and had a more limited geographical coverage than desired, thereby reducing the extent to which the store survey findings can be taken as representative of the retailer's overall performance in terms of local sourcing.

In terms of actual stocking of local and locality foods Iceland scored relatively poorly in comparison with other retailers, which may well reflect Iceland's policy on sourcing local foods.

None of the Iceland stores surveyed had any information leaflets for customers on local food, nor any special in-store displays for any local foods. None of the Iceland stores included in the survey had any local varieties of the six foods selected for inclusion in the survey.

As for the locality foods, all six were stocked in at least one of the Iceland stores surveyed. 50% of Iceland stores had locality cheeses, and 50% had locality lamb cuts. Locality potatoes and locality milks were only stocked in 33% of the Iceland stores, while only 17% of stores (1 store) had locality apples and 17% had locality beef.

In terms of numbers of varieties, the average numbers for those stores who stocked these locality foods were quite low: 1.25 varieties of locality potatoes, 1.5 varieties of locality apples, 1.89 varieties of fresh lamb, 2.5 varieties of fresh beef and about 6 varieties of locality cheese.

To score more highly, in-store information on local food to consumers would be provided, local foods would be stocked and more locality foods would be stocked in more stores, with a larger number of varieties of these foods made available for customers to choose from.



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A **store shelf survey of local and locality foods** stocked by retailers - focusing on apples, potatoes, fresh milk, pre-packed cheese, fresh beef and fresh lamb - was conducted by Sustain and the NFWI. The final survey sample for **Marks & Spencer** consisted of 10 stores. This sample was smaller than desired, and had a more limited geographical coverage than desired, thereby reducing the extent to which the store survey findings can be taken as representative of the retailer's overall performance in terms of local sourcing.

In terms of actual stocking of local and locality foods Marks & Spencer scored relatively poorly in comparison with other retailers. This low result probably reflects the Company's policy of sourcing British rather than 'local' foods. It must also be taken in the context of the fact that Marks & Spencer food halls generally have far fewer food lines than other much larger major retailers.

None of the Marks & Spencer stores surveyed had information leaflets for customers on local food, nor any special in-store displays for any local foods. 20% of the Marks & Spencer stores surveyed (2 stores) had local cheeses. None of the Marks & Spencer stores included in the survey had local varieties of the other five foods selected.

None of the stores stocked locality apples. However 100% of the surveyed stores stocked locality potatoes and locality cheeses, and 70% stocked locality beef cuts. 40% stocked locality milks, and 30% stocked locality lamb cuts.

The average number of different varieties of locality products stocked was consistent but low: 2 varieties of locality milk, 2.14 of locality beef cuts, 2.35 varieties of locality potatoes, and 2.5 varieties of locality beef cuts. On average 7.55 varieties of locality cheese were stocked.

To score more highly, in-store information on local food to consumers would be provided, local foods would be stocked in stores and a larger variety of locality foods would be available for consumers to choose from.



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A **store shelf survey of local and locality foods** stocked by retailers - focusing on apples, potatoes, fresh milk, pre-packed cheese, fresh beef and fresh lamb - was conducted by Sustain and the NFWI. The final survey sample for **Morrisons** consisted of 6 stores. This sample was smaller than desired, and had a more limited geographical coverage than desired, thereby reducing the extent to which the store survey findings can be taken as representative of the retailer's overall performance in terms of local sourcing. The smallness of this sample is in part due to the fact that Morrisons has a more northern distribution while other larger retail chains have a more widespread distribution across the country.

In terms of actual stocking of local and locality foods Morrisons scored slightly below average in comparison with other retailers.

None of the Company's stores included in the survey had information leaflets for customers on local food, nor any special in-store displays for any local foods. None of the stores surveyed had any local varieties of apples, potatoes, fresh beef or fresh lamb. 17% (1 store) had locality milk and 17% had locality cheese.

Stocking levels of locality foods were higher for some foods, but not for others. No locality apples were stocked in any store, only 17% of stores stocked locality beef and only 17% stocked locality lamb. Locality potatoes were stocked in 33% of stores, while locality milk and locality cheese were each stocked in 67% of stores surveyed.

As for average number of varieties of these foods stocked in those stores that did have them, the average number of local milk varieties stocked was 0.5, and of cheese was 3. The average number of locality potato varieties stocked was 3.5, for locality milks the average number of varieties was 2, for locality beef it was 3 and for locality lamb it was also 3. Far more varieties of locality cheeses were stocked in stores, the average figure was one of the highest at 9.38.

To score more highly, in-store information on local food to consumers would be provided, far more local foods would be stocked and a better selection of locality foods would be available for consumers to choose from.



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A store shelf survey of local and locality foods stocked by retailers - focusing on apples, potatoes, fresh milk, pre-packed cheese, fresh beef and fresh lamb - was conducted by Sustain and the NFWI. The final survey sample consisted of just 7 stores. This sample was smaller than desired, and had a more limited geographical coverage than desired, thereby reducing the extent to which the store survey findings can be taken as representative of the retailer's overall performance in terms of local sourcing.

Bearing these limitations in mind, of the **Safeway** stores surveyed it was found that none had local apples, local milk or local beef in stock, and only 14% (i.e. 1 store) stocked local potatoes, 14% stocked local cheese and 14% stocked local lamb. Of the local foods stocked, there were few varieties (on average 2 local potatoes, 1 local cheese and 1 local lamb cut).

Stocking rates for locality foods were better, with 14% of stores stocking locality apples, 43% stocking locality potatoes, 71% stocking locality milk, 86% stocking locality cheese, 57% stocking locality beef, and 71% stocking locality lamb. The average number of different varieties of these locality foods were: 1.2 varieties of locality milks, 2 varieties of locality apples, 2 varieties of locality beef, 2 varieties of locality lamb, 2.7 varieties of locality potatoes, and 9.1 varieties of locality cheeses in stores.

None of the Safeway stores had any customer information leaflets on local foods, and just 14% of the stores surveyed (ie 1 store) had an in-store display of local foods.

These results indicate that in practice Safeway is stocking a small selection of local products. Safeway's stocking of locality products in mainland stores was higher than one might have expected based on the limited policies and information provided in the response to the Module questionnaire.



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2003 company profile: Sainsbury's

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A **store shelf survey of local and locality foods** stocked by retailers - focusing on apples, potatoes, fresh milk, pre-packed cheese, fresh beef and fresh lamb - was conducted by Sustain and the NFWI. The final survey sample for **Sainsbury's** consisted of 7 stores. This sample was smaller than desired, and had a more limited geographical coverage than desired, thereby reducing the extent to which the store survey findings can be taken as representative of the retailer's overall performance in terms of local sourcing.

In terms of actual stocking of local and locality foods, Sainsbury's scored relatively highly in comparison with other retailers. This result needs to be considered in the context of the relatively large size of Sainsbury's stores, which allows them to stock a wider range of food lines, including in theory more local and locality varieties, than smaller stores such as the Co-op.

None of the Sainsbury's stores surveyed had information leaflets for customers on local food, nor any special in-store displays for any local foods. None of the stores included in the survey had any locally sourced apples, fresh local beef or fresh local lamb. 14% of the stores surveyed (1 store) had local milk, 29% had local potatoes and 43% had local cheese.

The Sainsbury's stores surveyed generally had far higher levels of locality foods, except for locality apples – only 14% of stores had these. 100% of stores had locality potatoes and locality cheese, 71% had locality milk and 71% had locality fresh beef, and 86% had locality fresh beef.

Average numbers of varieties of local foods were low - 1 variety of local potatoes, 1 variety of local milk and 1.67 of varieties of local cheese. Average numbers of varieties of locality foods stocked were quite varied – 0.5 of locality apples, 4.93 of locality potatoes, 2.7 of locality milks, 10.9 of locality cheese, 2.6 of locality beef cuts and 1.75 of locality lamb cuts.

To score more highly, in-store information on local food to consumers would be provided, far more local foods would be stocked in far more stores, and a better selection of locality foods would be available for consumers to choose from.



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A store shelf survey of local and locality foods stocked by retailers - focusing on apples, potatoes, fresh milk, pre-packed cheese, fresh beef and fresh lamb - was conducted by Sustain and the NFWI. The final survey sample consisted of just 6 stores. This sample was smaller than desired, and had a more limited geographical coverage than desired, thereby reducing the extent to which the store survey findings can be taken as representative of the retailer's overall performance in terms of local sourcing.

Bearing these limitations in mind, the survey revealed that no local apples, local potatoes or local milk were stocked. However 50% of the **Somerfield** stores surveyed stocked local cheeses, 32% stocked local beef and 17% stocked local lamb. Overall therefore Somerfield performed better on stocking of local foods than the other two participating retailers.

The average number of different varieties of these local foods in stores that stocked them was 2.5 local cheeses, 3 local beef varieties and 1.5 lamb varieties. The stocking levels for locality foods were varied but better, with 33% of stores stocking locality apples, 33% stocking locality milk, 83% stocking locality cheeses, 83% stocking locality beef, and 67% stocking locality lamb. None of the stores surveyed stocked locality potatoes. The average number of different varieties of the locality foods stocked varied. On average there were 1.5 varieties of locality apples per store, 2.5 varieties of locality milks, 5.3 varieties of locality cheese, 3.25 varieties of locality beef, and 3.5 varieties of locality lamb, in those stores that stocked any at all.

The store surveyed confirmed the information provided in the questionnaire regarding in-store promotion – no leaflets or special displays on local foods were found in any store.

Somerfield's policy on stocking local foods was to some extent supported by the shelf survey findings for cheese, beef and lamb, but not for apples, potatoes or milk. Stocking of locality foods was relatively good.



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A **store shelf survey of local and locality foods** stocked by retailers - focusing on apples, potatoes, fresh milk, pre-packed cheese, fresh beef and fresh lamb - was conducted by Sustain and the NFWI. The final survey sample for **Tesco** consisted of 12 stores. This sample was smaller than desired, and had a more limited geographical coverage than desired, thereby reducing the extent to which the store survey findings can be taken as representative of the retailer's overall performance in terms of local sourcing.

In terms of actual stocking of local and locality foods Tesco scored slightly above average in comparison with other retailers. This result needs to be considered in the context of the relatively large size of Tesco's stores, which allows them to stock a wider range of food lines, including in theory more local and locality varieties, than smaller stores such as the Co-op.

None of the Tesco stores surveyed had information leaflets for customers on local food, and only 17% (2 stores) had a special in-store display for local foods.

None of the stores included in the survey had any local varieties of apples or fresh beef. Only 8% of surveyed stores (1 store) had any local potatoes, local milk or local lamb. Only 17% of stores (2 stores) had local cheese.

Of the Tesco stores surveyed, far more had locality varieties of these foods. 33% of the stores had locality apples, 83% had locality potatoes, 58% had locality milks, 92% had locality cheeses, 58% had locality fresh beef and 25% had locality fresh lamb.

In terms of average numbers of varieties of the local foods stocked, there were on average only 1 local milk variety, 0.89 local cheese varieties, 1 local potato variety and 1.67 local fresh lamb varieties. Average number of varieties of locality versions of these foods were slightly higher: 1.1 varieties of locality apples, 2.6 varieties of locality potatoes, 1.6 varieties of locality milk, 5.5 varieties of locality cheese, 2.4 varieties of locality fresh beef and 3.16 varieties of locality fresh lamb.

To score more highly, more in-store information on local food to consumers would be provided in more stores, more local foods would be stocked in more stores and a far better selection of locality foods would be available for consumers to choose from.



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A **store shelf survey of local and locality foods** stocked by retailers - focusing on apples, potatoes, fresh milk, pre-packed cheese, fresh beef and fresh lamb - was conducted by Sustain and the NFWI. The final survey sample for **Waitrose** consisted of just 4 stores. This sample was smaller than desired, and had a more limited geographical coverage than desired, thereby reducing the extent to which the store survey findings can be taken as representative of the retailer's overall performance in terms of local sourcing. The smallness of this sample is in part due to the fact that Waitrose has a more south-eastern distribution while other larger retail chains have a more widespread distribution across the country.

In terms of actual stocking of local and locality foods, Waitrose scored well, in comparison with other retailers.

25% of the Waitrose stores surveyed (1 store) had information leaflets for customers on local food, but none had any special in-store displays for any local foods. None of the Waitrose stores included in the survey had any local varieties of apples, potatoes or fresh lamb. Only 25% (1 store) had local milk, 25% had local cheese and 25% had local fresh beef.

However Waitrose scored well on locality foods: 25% of stores surveyed had locality apples, 50% had locality potatoes, 75% had locality milk, 100% had locality cheese, 75% had locality fresh beef and 100% had locality fresh lamb.

As for average numbers of varieties of these foods stocked in stores, of local foods the number of varieties stocked was low: 2 local milk varieties, 1 local cheese variety and 1 local beef variety per store. However, for locality foods the average numbers of varieties stocked was relatively high. There were an average of 3.86 varieties of locality potato per store, 7.16 varieties of locality milk per store, 10.86 varieties of locality cheese per store, 2 varieties of locality fresh beef cuts per store, and 4.56 varieties of locality fresh lamb cuts per store.

To score more highly, more in-store information on local food to consumers would be provided in more stores, more local foods would be stocked in more stores, and an even better selection of locality foods would be available for consumers to choose from.