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Local food and the UK's leading food retailers: rhetoric and reality

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Abstract:

Within the UK, the market for local food seems to be growing rapidly. This paper explores how the UK's leading food retailers are responding to the growing demand for local food and offers some reflections on their responses. The paper begins with a discussion of the various definitions of what constitutes local food and the empirical information for the paper is drawn from the corporate websites of the UK's top ten food retailers and from a simple observational survey conducted within their stores in Cheltenham and Gloucester. The findings reveal that despite the retailers' publicly reported corporate commitments to local food, they make limited attempts to promote locally sourced food within their stores. The paper concludes that unless the UK's major food retailers rethink and reconfigure their supply systems to accommodate small local producers, then the volume of genuinely local food within stores is unlikely to grow substantially.

Keywords: local food; UK; leading retailers; sustainability.

1 Introduction

The market for locally sourced food appears to be growing steadily within the UK. Mintel (2011), for example, suggests that "growth of 27% to over £5.2 billion over 2005–2010 is estimated for locally sourced foods in the UK" and that it "expects the locally sourced food segment to grow to £5.8 billion in 2015". A range of factors have been put forward to explain the growth in consumer demand for locally sourced food. The market research and intelligence organisation, Mintel (2011), for example, suggests that "growing availability and consumer interest have supported growth in the" (local food) '*sector in the longer term*' and that local food "has continued to enjoy strong media support on mainstream TV". Elin Jones, the Minister for Rural Affairs in the Welsh Assembly Government, offers a public policy perspective in her '*Ministerial Forward*' to the "Local Sourcing Action Plan: Food and Drink for Wales", arguing that "people are demanding to know where their food comes from and are seeking reassurances on production methods and animal welfare. They are concerned about the negative impact of food distribution systems on the environment and want their money to support producers and growers directly" (Welsh Assembly Government, 2009). Within the academic literature, Jones et al. (2004), for example, argue that a number of factors are at work promoting growing interest in local food including "food scares and increasing consumer concern about food safety, a range of government agendas about sustainability and small businesses and the wider debates about globalization" while Nie and Zepeda (2011) suggest that the popularity of local food is '*an expression of identity*' in that growing numbers of people are increasingly "consuming the values that food provides".

Arguably the simplest access to local food is when people grow vegetables, and in some cases rear poultry and livestock, in their own gardens, allotments and small holdings but a number of routes to market have also come to be associated with local food. These include farmers' markets, encouragement for people to grow their own food in private and community gardens and on allotments, support for small specialist food shops, the development of 'food hubs' designed to allow a number of small scale food producers to work together and thus generate economies of scale, cooperative community food projects, pick-your own schemes and farm shops, vegetable box schemes, direct marketing and sales on the internet. However while such schemes provide valuable routes to market for local food the scale of this activity is currently totally overshadowed by the food sales of the large supermarkets and superstore chains which dominate the food market within the UK. Mintel (2010), for example, reported that "the UK is the most concentrated of all food retail markets" with just four retailers namely Tesco, Sainsbury's, Asda and Morrisons "accounting for 61.2% of all food retailer sales". However the rural pressure group, The Waterways Project (2011), has argued that "there is a growing willingness from supermarkets to support local food production as part of broader sustainability initiatives" and Mintel (2011) has suggested that "recent growth meanwhile has benefited from the leading supermarkets making local sourcing part of their corporate responsibility agenda". With such issues in mind this paper explores how the UK's leading food retailers are currently responding to the growing demand for local foods. More specifically the paper reviews the leading food retailers' public commitments to local food sourcing as publicly reported on their corporate websites, investigates the marketing communications messages used to promote local foods to customers within stores and offers some reflections on the findings.

2 Local food

The term local food slips easily off the tongue and while a common sense approach might suggest that local food is produced and defined within a narrowly defined geographical area there is no broadly agreed definition. On the one hand there is a set of quantitative definitions essentially based on geography and which predominantly defines local in terms of the distance between producers and consumers though "various organizations apply different criteria depending on their particular goals and priorities" (Welsh Assembly Government, 2009). Thus the National Association of Farmers' Markets suggests that a producer must be located within a 30 mile radius of the market to be classed as local. In a similar vein the retailer Waitrose states that all food described as local in one of its stores is produced no more than 30 miles from that store. In some of the Cooperative Group's stores the 'Local Harvest' range is described as being sourced within 40 miles of that store and much more expansively the London Farmers' Markets stipulates that to be accredited as local, produce must be raised, grown, made, caught or baked within 100 miles of the M25. Having reviewed such geographical definitions, Ilbery and Maye (2006) conclude that local food is '*an elastic concept*' and they further suggest '*population density is important*' in that what '*counts as local*' in '*very sparsely populated areas*' may be '*very different*' from what is considered local in densely populated areas.

On the other hand there are a set of qualitative definitions based on what might be best described as emotional reach. Here the accent might in part be seen to be on consumers recognising products as being local though the sense of locality will vary from one customer to another. At the same time some meanings of the term look to embrace the nature of food production. DEFRA (2003), for example, outlines definitions provided amongst others by Sustain, the Alliance for Better Food and Farming, the Soil Association and the Foundation for Local Food Initiatives and such definitions tend to regard local food as that which meets a number of criteria including not only the geographical distance between producers and consumers but also a number of loosely defined environmental, animal welfare, employment, fair trading relations, producer profitability and cultural conditions. More politically, Feagan (2007) argues that the "local food systems movements, practices and writings pose increasingly more visible structures of resistance and counter-pressure to conventional globalizing food systems".

A number of benefits are claimed for local food and these embrace environmental, economic, social and cultural issues (Facilitating Alternative Agro-Food Networks, 2010) and, in many ways, are perceived to be bound up with the concept of sustainability. A greater emphasis on local food is said to reduce the food miles and potentially to enhance the viability of environmentally friendly farming systems. Economic benefits claimed for local food include the creation and security of employment opportunities within the local area, support for local businesses and the retention and circulation of money within the local economy. Socially there are arguments that the purchase and consumption of local food can enhance trust and confidence between producers and consumers, reconnect consumers with the sources of their food and enhance their awareness of the links between food and the environment. In addition an increased emphasis on local food is seen to offer greater food security and such food is perceived as fresher, more wholesome and more flavoursome and of a higher quality. At the same time a number of disadvantages are also associated with local food. There are problems with diseconomies of scale in that small local food producers effectively find it difficult to compete with large food producers and for many consumers locally produced food is often seen as more expensive, less convenient, less varied and less available. Supplies from small scale local production can be intermittent, seasonal and affected by adverse weather conditions.

3 Frame of reference and method of enquiry

In an attempt to obtain some basic insights into how the UK's leading food retailers are responding to the increasing demand for local food, the UK's top ten food retailers (Table 1) which account for 79.8% of food sales (Mintel, 2010), were selected for study and data was collected at both the corporate and the store level. At the corporate level the authors undertook an internet search of each of the top ten food retailers' corporate websites and corporate responsibility/sustainability reports in June 2011 using the key words 'local food'. The aim here was to discover if, and the extent to which, the retailers were publicly reporting on their commitment to local food sourcing. While the precise pattern of navigation varied from one company to another depending on the structure and layout of each site, the authors were satisfied that the information accessed met the reliability and validity criteria for information collected via the internet as set out by Saunders et al. (2009).

At the store level a straightforward observational survey was conducted in an attempt to gain some insight into how the UK's leading food retailers were using marketing communication messages to draw customers' attention to locally sourced produce. More specifically 'a walk through combining structured visual observation and data recording' survey was undertaken by two of the authors in the largest store operated by each of the UK's top ten food retailers namely Tesco, Sainsbury's, Asda, Wm. Morrison, Cooperative Group, Marks and Spencer, Waitrose, Spar, Iceland and Lidl (Mintel, 2010) in Cheltenham and Gloucester in the West of England. The stores varied considerably in size with the Tesco and Sainsbury's stores, for example, having some 40,000 square feet of shopping space and offering a wide range of food and non-food goods while the Iceland and Spar stores had less than 1,000 square feet of floor space and concentrated exclusively on a relatively narrow range of foodstuffs. In order to provide a structured framework whilst undertaking the survey the authors 'adopted' the 'shadow persona' of a two adult/two child family. Such an approach offered two distinct advantages. Firstly it was simple to conceptualise, easily executed and readily replicable. Secondly the authors believe that it captured an accurate insight into the ways in which messages about local food were, or were not, being presented to customers within store and as such successfully captured the richly detailed reality of the customers' retail experience and their engagement with local food at the point of sale. At the same time it locates local food sourcing and purchasing in a dynamic retail setting and provides a view through the lens of the customer and as such the approach adopted reflects daily realities and routines as executed repeatedly by customers throughout the UK and a such potentially offers more realistic and accurate insights than more detailed modes of empirical enquiry. More specifically the survey systematically explored the extent to which local food messages were being used in marketing communications on banners and posters, on the shelves and shelf edges, on the products themselves and on information leaflets and promotional leaflets and flyers.

Table 1 Top Ten UK Food Retailers 2010

Company	*Sales (£ million)*
Tesco	38,558
J. Sainsbury	19,964
ASDA	19,836
Wm. Morrison Group	15,410
Cooperative Group	7,516
Marks & Spencer	4,416
Waitrose	4,317
Spar	2,611
Iceland	2,203
Lidl	1,980

Source: Mintel (2010)

4 Findings

The search of the retailers' corporate websites revealed considerable variation in their publicly reported corporate statements on local food. Thus while a number of the retailers claim, in some cases, a strong commitment to local food, often in response to consumer demand, others make more limited, less clear cut or no mention whatsoever of a role for local food in their sourcing policies. ASDA, for example, claims "local sourcing is a fundamental part of our business and continues to be so as customers tell us more and more that they want local food on our shelves" and that "local sourcing is about being at the heart of the local community". Further ASDA describes the activities of its "dedicated local sourcing and buying team whose sole aim is to identify local products and work with small suppliers to enable their products to reach our stores". As part of its commitment to local suppliers the company recognises that "local products often come from very small suppliers" and that "it is important for us to make it cheap, easy and risk free as possible for these suppliers to do business with us". Waitrose claims to be "working in partnership with small producers" and argues that it "helps boost the economy in many rural areas and its customers get to sample the very best foods made locally". Waitrose also reports that the company's "initiatives to promote local sourcing include inviting local farmers into shops to meet customers, supplier conferences and industry workshops which help smaller producers to understand food legislation and to ensure best practice is shared throughout the supply chain". The Cooperative Group argues that it "will continue to support significant local sourcing initiatives, whilst noting that these are driven not by a concern for food miles or carbon reduction, but the desire of some customers to support local UK products". Morrisons, report that "at all our Market Street counters you'll find locally sourced favourites as well as foods from around the world' and that 'for local specialities, we serve only the best and freshest from the area: like local pies straight out of the oven, such as the Hot Pot pie in Lancashire; unusual varieties of cheese sourced from local dairies at the Deli counter; or the month's guest ale from a local brewery".

Several of the top ten food retailers conflate local, regional and national sourcing on their corporate websites. In describing its '*regional ranges*' J. Sainsbury, for example, argues "we continue to see increased demand from our customers for regional products, primarily because they want us to help them support their local economy" and claim that "we try to make it easier for our customers to seek out these regional and local products both within store, through press releases and leaflets, and online" and that "we are also helping local and small suppliers to develop their businesses where we see real potential". In a similar vein Waitrose claims that its "commitment to local and regional sourcing is one of the most established in the food retail sector and covers nearly 2,500 locally and regionally sourced products from over 450 producers". Spar claims "we are local, our stores have local owners and our products are supplied by local and regional companies". While Tesco report stocking "approximately 3,000 local lines in our UK stores' and argues that 'buying local products helps to develop and sustain the communities in which we operate, and is often what our customers demand". Tesco explains that "local lines are those produced and sold within a county or neighbouring county in England or within the country in Ireland, Scotland and Wales". The company claims to be "the first UK retailer to launch a website dedicated to local foods" but the site lists just five varieties of bottled beer and three varieties of pies within a fifty mile radius of one of the author's postcodes in Cheltenham. At the same time there is also some intermingling of local and national food sourcing messages. Morrisons, for example, claims "our business programme is concerned with how we buy, make and sell food. In championing British farming, for example, we shorten our supply chains, support our national and local economy and are buying into standards that people trust". Marks and Spencer makes no explicit statement to sourcing local food per se, though more generally the accent is on "increasing our use of small and small local suppliers" with a target of "improving the understanding of our buying teams of the needs of small producers by 2012". More widely the company reports its commitment to "sourcing as much food as possible from the UK and the Republic of Ireland". Lidl reports "being proud to offer a range of produce that is grown and packed in Britain" and Iceland makes no comment on local food sourcing arguing "Iceland sources products from around the world to ensure tremendous value for our customers".

The survey undertaken within stores revealed only limited evidence that the top ten food retailers were actively promoting locally sourced food to customers and across the stores as a whole where there was a sourcing message the emphasis was overwhelmingly on British rather than local produce. In only two of the stores surveyed, namely the Coop Group and Spar, was the customers' attention specifically drawn to local produce. Within the Cooperative Group's store two prominent banners hanging from the ceiling with the headline '*Local Harvest*' proclaim "we sell products which have been sourced within a 40 mile radius of this store" and "we are committed to supporting local producers" and this commitment is reinforced by a small number of shelf edge labels which convey the same message. In the event the volume of produce specifically designated as being local is limited namely five shelves carrying a variety of '*Hand Maid*' cakes and a small number of jars of '*Kits Runner Bean Chutney*' and '*Three Counties The Connoisseurs Mustard*' all of which are accompanied by shelf edge labels proclaiming '*I'm a locally sourced product'*. The store also had a display of wholefood products accompanied by the message "Mid Counties Cooperative: supporting Oxford Wholefoods for over 20 years" but the producers are based some 41 miles from the store and thus do not qualify as being 'local' within the company's current 40 mile radius definition. The Spar carried a small range of bread and cakes from '*Drapers Bakery*' in Tewkesbury. Despite ASDA's strident website commitment to '*local sourcing*' cited earlier there were no messages within their store to direct customers to local products and a short article entitled '*Local Hero*' in the company's house magazine available within the store focused on a lettuce grower in East Yorkshire.

There was some limited evidence of regional sourcing, in the Wm. Morrison store, for example, some of the milk was described as being sourced '*from dairy farms in the West country*' and a poster behind the fresh fish counter in the J. Sainsbury store read '*regionally caught from sustainable sources*'. However the most obvious sourcing message, in all the stores surveyed, focused on British produce. In the Waitrose store, for example, a number of banners carried the message '*Championing British the Waitrose Way*' and a similar banner hanging above the vegetable displays in the ASDA store read "We work with hundreds of British growers to ensure only the best quality". The Cooperative Group describes its apples and pears as being '*British to the core*' and under the banner '*Deliciously British*' proclaims that "all our fresh beef is 100% British all year round". A banner behind the fresh meat counter in the Tesco store read "British through and through. All meat on our counter is 100% British" and a similarly placed poster in the J. Sainsbury store proclaimed that all its meat is "100% British from farmers we know and trust". Wm. Morrisons badged a range of their fish products including mackerel fillets, smoked haddock and smoked salmon as being '*Scottish sourced*'. In the majority of stores surveyed a wide range of fresh and chilled produce, including vegetables, fruit, herbs, chicken, beef, pork, gammon, bacon, sausages, cheese, eggs and milk were marked '*British*' and prominently carried the Union Jack symbol. In a number of stores '*Hovis*' bread was described as being made with '*British Wheat*' and in some stores a number of ready meals were marked, for example, as containing '*British Beef*' or '*British Chicken*'.

5 Discussion

While the findings reveal considerable variation in the top ten UK food retailers' publicly reported corporate commitment to local food sourcing they also suggest all of these retailers currently make only limited attempts to promote local foodstuffs to customers within their stores. Messages designed to promote locally sourced food were generally limited and there was no evidence of a discernible coherent approach to the marketing of local produce in any of the stores surveyed. Three sets of issues merit reflection. Firstly if at least some of the retailers are as genuinely committed to local food sourcing as they claim to be and if this goal is, as a number of the retailers also claim, driven by consumer demand, then it seems strange that a much wider range of locally sourced food is not prominently promoted at the point of sale within stores. In part the retailers' support for local food sourcing may be considered to be aspirational not least because of the problems they face in routinely sourcing food locally. Ilbery and Maye (2006), for example, suggest that "the sheer lack of local quality food is most significant, compounded by an apparent void of suitable intermediaries to process and transport local products" and that "other difficulties include sourcing the right quantities of product from producers as and when required with local sourcing often seasonal and limited by their size and small number". More structurally on the supply side there are suggestions that small producers will find it increasingly difficult to compete in food markets. In his review of the future possibilities for land use within the UK, Munton (2009), for example, argues that increases in agricultural commodity prices and adverse and increasingly uncertain weather conditions will see the encouragement of "intensive systems of food production" and that this will, in turn, "be likely to encourage further expansion of the largest and most efficient farm businesses whilst prompting the disappearance of small farms".

At the same time a number of the major food retailers themselves have reported that 'small suppliers of food and drink products typically faced producers' barriers to entry and expansion arising from quality standards and other requirements relating, for example, to IT systems and distribution capabilities' (Competition Commission, 2008). Corporate Watch (2010) argues that "the current structure of supermarket transportation and delivery systems makes it unlikely that they" (namely the major food retailers) "will deliver on their rhetoric of local food" and that they "have no intention of making the wholesale switch from global/national sourcing to sourcing all types of goods, for all consumers, locally". Tesco and Asda, for example, report establishing 'dedicated teams' to support local sourcing. However if the leading retailers simply want to try to find ways to enable small scale producers to adopt and adhere to the company wide supply procedures designed for large scale suppliers, rather than to adapt or change and simplify their systems to accommodate such producers, then the volume of local food available within their stores seems unlikely to show any substantial increase.

Secondly many of the leading food retailers' construction of 'local' seems to embrace regionally and nationally sourced food and as such it certainly seems to be at odds with traditional interpretations of local food. However there is an argument that within the wider context of increasingly international and globalised food sourcing 'national' is the realistic definition of the new 'local' and one that reflects, Ilbery and Maye's (2006) view of local food as '*an elastic concept*' as mentioned earlier. So constructed, the leading food retailers' claimed commitments to local sourcing might be seen, in part at least, to be confirmed in the promotion of a range of British products within their stores. Such a sourcing policy may well support small scale food producers and suppliers and in turn help to strengthen local economies in many parts of the UK, though not necessarily in the area local to the store in which the products are stocked. This in turn affords greater local credibility, for example to J. Sainsbury reporting on its "regional teams with buying offices in Scotland, Northern Ireland and England continue to look for the best regional products from local suppliers" and on its buyers helping "12 Scottish suppliers secure distribution of their products outside of Scotland". Rather more critically, Corporate Watch (2010) argues that the large food retailers' commitments to local food "look increasingly like exercises in finding new products for store shelves than a real move towards local sourcing" and they suggest that for the most their local food sourcing strategies are predominantly designed to "boost their corporate social responsibility rhetoric" and that "they are poised to suck whatever profits they can out of the local food sector".

Thirdly while many of the top ten food retailers claim to be actively promoting local food sourcing there are problems in making any independent assessment of the veracity of such claims. Only Waitrose and the Cooperative Group provide a specific definition of precisely what local means for them and all other public statements about local sourcing have to be taken on trust. At the same time none of the top ten food retailers offer any systematic evidence of their actual achievements, as opposed to their public statements about local sourcing in either the main body of their corporate social responsibility reports or in the external assurance statements that accompany some of these reports. More independently, research undertaken amongst six specialist food producers in the Scottish/English borders by Ilbery and Maye (2004) reveals that such local producers often source their inputs "from various places, often many miles from the place of production, and sometimes from overseas" and this further blurs any definitions of local food while also leading the authors to argue that "this places a different perspective on the very notion of a short, and thus sustainable, food supply chain".

Finally this is turn signals that the concept of local food has become part of much wider debates. Dupuis and Goodman (2005), for example, have argued "most food activist discourse makes a strong connection between the localization of food systems and the promotion of environmental sustainability" and that many academics "have embraced localization as a solution to the problems of global industrial agriculture". However, Hinrichs (2003) has argued "that desirable social or environmental outcomes may not always map neatly onto the spatial content of local which itself involves the social construction of scale”. Turning first to sustainability, following a series of case studies of food purchasing behaviour in five separate areas of the UK, Winter (2003) warned that claims to be embedding sustainability into the food supply chain via an emphasis on, and the encouragement, of local food supplies, though often seen to be a characteristic feature of a move to a more sustainable future, ‘*requires critical scrutiny*’. He argued that it remains to be seen if greater reliance on local produce will “herald a more ecologically sound agricultural sector” (Winter, 2003) and Hess (2008) has argued that “the connection between localism and environmental dividends is variable and tenuous”. More generally, Ilbery and Maye (2006) have suggested that “local food is often promoted as an alternative model, closed geographical system and separate from the conventional agro-food system”. However, given that the leading food retailers have come to dominate food buying behaviour within the UK by “significantly reconfigured supply chains, developed sophisticated outlets and distribution systems and importing huge volumes of produce from around the world”, (Ilbery and Maye 2006) it is difficult to see them fundamentally reconfiguring their thinking or their operations to favour local producers. In a similar vein, Winter (2003) concluded that “it is open to question whether ‘…..’the turn to localism as the first steps towards an alternative food economy which will challenge the dominance of globalised networks and systems of provision” while DuPuis and Goodman (2005) “caution against the reification of the local ‘..’ as a bulwark against anomic global capitalism”.

6 Conclusions

In the introduction to five European case studies of local food systems, Facilitating Alternative Agro-Food Networks (2010) argued that the central idea of “such systems is a commitment to social cooperation, local economic development and close geographical and social relations between producers and consumers”. As consumer demand for and interest in locally sourced food has grown within the UK so many of the leading food retailers, which dominate food retailing and whose operations are characterised by large scale corporate transactions, branded goods and national and increasingly global sourcing, publicly claim to be committed to local sourcing on their corporate websites. However there is only limited evidence that the leading food retailers are stocking and promoting what is generally, if loosely, defined as local food preferring instead to use their own construction of locally sourcing to focus on British produce which is more attuned to their dominant business model. Unless these major food retailers rethink and reconfigure their supply systems to accommodate small local producers then the volume of genuinely local food that they stock seems unlikely to grow substantially in the short to medium term. Even if such growth were to materialise it remains to be seen whether it will increase food security and challenge the increasingly international hegemony of the large food retailers and their suppliers.

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Top ten UK food retailers' websites

Tesco, available at http://www.tescoplc.com/.
J. Sainsbury, available at http://www.j-sainsbury.co.uk/.
ASDA, available at http://www.asda.com/.
Wm. Morrison Group, available at http://www.morrisons.co.uk/.
Cooperative Group, available at http://www.co-operative.coop/.
Marks and Spencer, available at http://www.marksandspencer.com/.
Waitrose, available at http://www.johnlewispartnership.co.uk/.
Spar, available at http://www.spar.co.uk/.
Iceland, available at http://www.iceland.co.uk/.
Lidl, available at http://www.lidl.co.uk/cps/rde/xchg/lidl_uk/hs.xsl/index.htm.