

September 2005

London Development Agency Better food for London: the Mayor's Draft Food Strategy



Foreword from Ken Livingstone

Food is such a normal part of everyday living that its effects can easily be overlooked. Whether eating at home or dining out, Londoners benefit from a complex food system that daily meets the capital's enormous food requirements. This draft strategy sets out how - through the co-operation of all those involved – we can enhance our health, increase our pleasure from eating and dining, enrich further our experience of London's cultural diversity, and ensure a more sustainable future.

London's extraordinary social and cultural diversity is reflected in over 60 different cuisines provided in over 12,000 restaurants – more than half the nation's total. This variety and vibrancy extends to London's food retail outlets, with exciting well-known markets like Borough and Walthamstow alongside major supermarkets and independent corner shops. 'Food tourism' is an increasingly vital element of London's attraction for visitors. It has many of the best restaurants in the world, and an unparalleled choice of cuisine. Ensuring this diversity is enhanced and quality continually improved will add to the attractiveness of London as a place to live and do business.

However, there are also significant challenges. Obesity and diet-related illnesses account for a huge number of premature deaths in London, with many on low incomes suffering disproportionately. In many parts of London, people struggle to access affordable, nutritious food. Many of those involved in the food system are barely benefiting from it economically and the environmental impact of the food system is considerable.

There are many features of London's food system that we need to improve if we are to meet my vision of a sustainable world city. I believe there is much that can be done by both organisations and individuals. This draft Food Strategy sets the strategic context and outlines a plan of action to help us all make better and healthier choices. It celebrates our vibrant and successful food culture, seeks to maximise new opportunities and tackle and overcome areas of weakness. Your opinions will help shape this strategy and ensure that we address these issues in a way that is meaningful and relevant for London. I would like to thank London Food and all those who have helped to produce this draft Strategy and look forward to hearing your views on its contents.



Ken Livingstone, Mayor of London

Foreword from Jenny Jones, Chair London Food

This draft Food Strategy for London is ambitious yet practical. It sets out a framework and action to help deliver a food system that is consistent with the Mayor's objective that London should be a world-class sustainable city. It does this by building and encouraging best practice, whilst tackling and overcoming areas of weakness. It will help improve food in London's schools, hospitals and other public institutions, and will offer people on low income better access to healthy and affordable food.

The draft strategy also addresses the negative impact on local and global environments of high levels of food imports. It seeks ways to support local, regional and organic producers, and help connect them to London markets and consumers. This is important to ensure a safe and secure supply of food, that will also reduce London's ecological footprint.

I should like to thank the board members of London Food for their vital contribution towards this draft sustainable Food Strategy for London. The wide practical knowledge and expertise which they have brought to the drafting of the strategy has put a sustainable food system for London within our reach. We have been well supported by the London Development Agency, the Mayor's agency for business and jobs.



Jenny Jones, Chair London Food

NEXT STEPS

The deadline for responses to the public consultation of the draft London Food Strategy is **7th December 2005**

The final strategy will be published early in 2006. To ensure that your comments are incorporated into the consultation, please send your response to either one of the following:

a) Postal responses to be sent to:
Food Unit
London Development Agency
Freepost Lon18875
LONDON
E1W 1BR

b) Electronic questionnaire can be completed online at www.lda.gov.uk/londonfood

For further information on the consultation process and events, as well as other London Food activities please go to www.lda.gov.uk/londonfood, or send an email to londonfood@lda.gov.uk

The results of this consultation will be summarised in a report that will be available on the London Food web site when completed.

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Summary

Background to Food in London

Befitting its world city status, London has an extraordinary food culture. The city has high profile, world-class restaurants, shops of all conceivable sizes selling produce from around the world and cuisines as diverse as London's cosmopolitan population.

Behind the scenes, an extraordinary infrastructure of growers, producers, haulers and retailers ensure that millions of people in London – those who visit, work and live in the city – are able to choose from an unprecedented variety of foods and drinks, and to eat well.

The food industry impacts upon every aspect of the lives of all Londoners, whether economic, social or environmental. Supplying this huge, demanding and competitive market, for example, provides employment for many tens of thousands of people. Working in settings as diverse as world-scale retailers, niche manufacturers and contract catering companies and, by creating a wide range of economic opportunities contributes to the success of London's world-class economy.

However, as many are slowly becoming aware, there are problems associated with this abundance; and London both contributes to, and has responsibility for some of these problems.

Too many people in London, particularly young people, are suffering from obesity caused by current generations eating more and taking less exercise. Too many people in London are not able to exercise the choices enjoyed by the majority. Too many people in London are unaware of the way food is grown and produced, with consequences that work back through the food system to farms and farmers.

The environmental consequences of the food London eats are also profound. London's food system, including the transportation of food, contributes to the emission of climate changing gases such as carbon dioxide. Food-related waste is also a major component of London's overall waste.

For those working in the food sector, wages are often low. For those growing food, contracts are often extremely demanding. London has lost many street markets in recent decades, reducing the availability of cheap fresh fruit and vegetables. There are concerns that London's 'food security', its ability to cope in the event of major disruptions, is not as great as it should be.

In acknowledgement of the need, on the one hand, to maintain and enhance areas of success and, on the other, to tackle and overcome areas of weakness, the Mayor asked the London Food Board to lead on the development of this London Food Strategy.

The overall objective of the Strategy is straightforward; to ensure London has a food system that is consistent with the Mayor's objective that London should be a world-class, sustainable city.

The details of why London needs a Food Strategy, together with highlights of the strengths and weaknesses of London's food system, are presented in Section 1 of the main document.

Context

The London Food Strategy needs to take account of a wide range of influences. Global and European trends affect London's food system, whether through the operation of the world's free trade system, the European Common Agricultural Policy, or through the competitive pressures on the major retailers.

National issues are also of immense importance. The National Strategy for Sustainable Food and Farming, in particular, sets a vital context for the London Strategy, highlighting as it does the need to 'reconnect' consumers of food with producers of food.

Other national strategies are important to London's food strategy. The Department of Health's 'Choosing Health' White Paper, for example, sets out a wide range of food-related actions required by the health service. The Department for Education & Skills (DfES) is now moving forward on tackling the quality of school meals.

Within London, many of the Mayor's other strategies have an impact upon food issues. The Spatial Development Strategy (the London Plan) sets out the integrated social, economic and environmental framework for the future development of London and has policies which affect retailing, leisure, logistics and waste. The Transport Strategy influences the means by which people can access their food, the Municipal Waste Management Strategy addresses ways to tackle household food-related waste and the Economic Development Strategy (EDS) relates to issues of skills and employment affecting the food sector.

And, of course, London's people – diverse, changing and demanding – make millions of daily choices that dictate success or failure for the thousands of enterprises involved in London's food system.

It is also important for the Strategy to note the range of organisations involved. These include national bodies such as the Food Standards Agency, the Food and Drink Federation (FDF) and the major retailers, as well as regional bodies such as the Greater London Authority (GLA) family, the Regional Public Health Group of the Department of Health (DH) and the Government Office for London (GOL). It also includes campaigning groups and non-government organisations such as the Soil Association, Sustain and London Food Link, as well as London Boroughs, independent retailers and markets.

To fulfil its objectives, this Strategy needs to be a strategy for all these organisations, and needs to take account of the wider forces acting on the city. *Details of the context for the Strategy are presented in Section 2 of the main document.*

Strategic Objectives

The London Food Strategy focuses on five themes; health, environment, economy, social/cultural and security. These themes capture the breadth of issues affecting food and affected by food, and incorporate the Mayor's cross-cutting themes of health, equality and sustainability.

Corresponding to these five themes, the London Food Strategy has five broad objectives. They are:

- to improve Londoners' **health** and reduce health inequalities via the food they eat
- to reduce the negative **environmental** impacts of London's food system
- to support a vibrant food **economy**
- to celebrate and promote London's food **culture**
- to develop London's food **security**.

An explanation of the 'framework' for the strategy, together with extensive facts and figures on the current 'state of play' in London's food system, are presented in Sections 3 and 4 of the main document.

A Vision for London

In the light of the strategic objectives, the Mayor and the London Food Board have a vision of a world-class, sustainable food system for London.

"In 2016, London's residents, employees and visitors, together with public, private and voluntary sector organisations will:

- take **responsibility** for the health, environmental, economic, social, cultural and security impacts resulting from the food choices that they make, and their role in ensuring that food and farming are an integrated part of modern life
- demonstrate **respect** for all the many elements involved in the provision of their food, and respect fairly the environment, the people, the welfare of animals, the businesses and others involved in providing their food
- be more conscious of the **resources** used in growing, processing, distributing, selling, preparing and disposing of their food, and be more engaged in minimising any negative impacts arising from this resource use
- benefit from the **results** of this effort, such that all Londoners have ready access to an adequate, safe, nutritious and affordable diet that meets their health, cultural and other needs, and better protects the environments in which we live and those which we visit.

In order to identify where actions are required to achieve this vision, the Strategy separates eight stages of the food chain. This vision translates to the each of these eight stages.

- **Stage 1 – Primary Production.** London's principal role will be, through its purchasing habits, to contribute to a diverse and sustainable farming sector in the UK and beyond.
- **Stage 2 – Processing & Manufacturing.** London's role will be to specify and expect high standards from processors based outside the capital that are supplying London, to both expect and support such standards within London itself.

- **Stage 3 – Transport, Storage & Distribution.** London will have a food distribution infrastructure that is economically and environmentally efficient, as well as socially just.
- **Stage 4 – Food Retail.** Those responsible for selling food in London will be playing an even more positive role in promoting a healthy and more sustainable food system for the capital.
- **Stage 5 – Purchasing food.** The way in which Londoners, both individuals and organisations, buy and procure their food will be the principal means by which London contributes to a healthy and sustainable food and farming system in the UK.
- **Stage 6 – Food Preparation, Storage & Cooking.** By 2016 many more Londoners will have the opportunity and the means to safely prepare and cook their own food.
- **Stage 7 – Eating & Consumption.** Londoners will have the confidence, awareness and understanding to eat healthily, and in ways that contribute to wider environmental and social goals.
- **Stage 8 – Disposal.** London by 2016 will be taking far greater responsibility for its food-related waste, through waste reduction, recycling and composting, waste treatment and reducing food-related litter.

Full details of the vision are presented in Section 5 of the main document.

Actions & Implementation

To achieve the vision and meet the strategic objectives, a series of actions are proposed.

Six priority areas, which require coordinated action in order to gain maximum effect are summarised below. In each case, actions address the five objectives, on health, environment, economy, social/cultural and security, in an integrated fashion.

- **Ensuring commercial vibrancy.** Business support including training and aimed to support farmers, specialist food manufacturers, specialist markets, distribution partnerships and a diversity of food 'clusters', as well as promoting tourism, London's retail offer and London's food culture.
- **Securing consumer engagement.** Programmes of awareness raising, education, skills and other support, particularly in terms of health and waste reduction, to enable the full diversity of Londoners both to understand food issues and to be able to act accordingly.
- **Levering the power of procurement.** A range of actions to support and encourage both public and private sector organisations to incorporate sustainability within their food procurement decisions.
- **Developing regional links.** Developing brokerage and support systems to enable producers in and around London to understand and access the opportunities of the London market.

- **Delivering healthy schools.** A range of actions with both short and long term benefits and involving improvement to school meals, training and equipment for cooks, education, cooking skills and food waste awareness for pupils.
- **Reducing waste.** A range of initiatives to bolster London's efforts to tackle its food-related waste problems, for both households and commercial and public organisations, around reducing food and packaging wastage and increasing composting.

These are the **outline** areas for action. More detail is provided in section 6. A full and achievable action plan will be developed with partners during the consultation phase and incorporated into the final strategy. Actions will need to be prioritised, their costs estimated, budgets and sources of funding agreed.

Full details of the Action & Implementation Plan are presented in Section 6 of the main document.

Closing Remarks

As with other Mayoral strategies, the ambitions set out in the London Food Strategy can by no means be achieved by the Mayor acting in isolation. Concerted effort from a variety of organisations and individuals will be required if the vision set out in this strategy is to become a reality.

It is hoped that many people and organisations will take the opportunity to comment on this strategy, and their comments will undoubtedly strengthen it further. It is further hoped that having become engaged in and enthused by the strategy, many organisations and individuals will work on putting the strategy into effect in the years ahead.

Most of all it is hoped that the overarching priority – of developing a food system that is healthy and sustainable for **all** Londoners – is widely shared. London is a world city and deserves a world-class food system.

Guide to the Document

This Strategy document proceeds step-by-step. It starts with a variety of general arguments, presents a range of detailed information and builds to a specific set of proposed actions.

Section 1, the **Introduction**, sets the scene. It explains why London needs a food strategy, and introduces the key themes of health, environment, economy, equalities, culture and security that run through the document. It summarises why food is so important to each of these themes and also discusses a variety of food issues that sometimes provoke fierce debate.

In Section 2, the document highlights the wider **context** for the Strategy. There is a discussion of major policies that are relevant to the London Food Strategy, at both national and regional level, as well as a discussion of current 'big picture' trends affecting the food industry.

Section 3 has an important function, since it sets out the **framework** for the Strategy. The framework provides the organisation for the subsequent sections of the document. It is in this section that the stages in the food chain 'from farm to fork' and the key strategic themes introduced in Section 1 are brought together.

A great deal of detail is presented in Section 4, setting out the **current state of play** of food in London. Organised using the headings of the framework (from Section 3), and against the policy and market context presented in Section 2, section 4 draws on a wide variety of sources to flesh out the themes and debates touched upon in Section 1, and to provide the evidence for Section 5.

Section 5 presents a **vision** of the London food system in 2016. The vision emerges from the need to maintain and enhance London's strengths, and to tackle and overcome its weaknesses, as identified in Section 4. The vision is articulated in two main ways: using the London Sustainable Development Framework to capturing the issues of health, equalities and sustainable development that are the Mayor's cross-cutting themes, and for each of the eight stages of the food chain.

In order to achieve the vision, numerous **actions** will be required, and these are set out in Section 6. From among an extensive set of actions specific to the eight stages of the food chain, and which address the health, environmental, economic, social/cultural and security themes that run through the strategy, six priority clusters are identified. Section 6 explains these priorities, giving useful case studies as examples and concludes with proposals for next steps.

Finally, the document presents a number of Appendices. These include a Glossary, covering terms such as 'ecological footprint' and 'food miles', which are used throughout this document and which may not be familiar to the general reader.

1 Introduction

1.1 Why a Food Strategy?

This document sets out the Mayor's Food Strategy for London. It explores the significance of food in and for the capital; sets out a vision for the future of London's food system; and outlines the key actions and support required to achieve this vision.

The Mayor's London Food Strategy is predicated on a simple observation: that the 'food system' in the capital is not functioning in a way that is consistent with the ambition that London should be a world-class, sustainable city.

Many features of the food system in London are positive.

- Every day, millions of Londoners are able to access food they want and food they can afford.
- World-class retailers contribute to the commercial prosperity of the city, and provide employment for many thousands of people.
- Hundreds of businesses throughout London and the surrounding regions prosper by processing and manufacturing the food the city needs.
- The city's extraordinary social and cultural diversity is reflected in a restaurant culture that has seen it recently crowned the 'gastronomic capital of the world'.

Many features are much less positive.

- A rising number of Londoners, particularly children, are becoming obese.
- In some parts of London, people struggle to access affordable, nutritious food.
- The safe preparation of food, both in the home and in London's plethora of restaurants and cafes, remains a key issue.
- Many small or independent enterprises, such as retailers, farmers, food manufacturers, marketers, struggle to survive and their fragility may affect both the diversity and resilience of London's food system.
- The environmental consequences of the way London's food is grown, processed, transported and disposed of are profound and extensive.

Of course, London does not exist in a vacuum, and cannot act in isolation. The food system in London operates within a globalised setting, such that the negotiations of the World Trade Organisation (WTO) or the corporate strategies of global giants such as Wal-Mart or Tesco affect London in a very real way. European legislation on health and safety, product labelling, and the operation of the Common Agricultural Policy, are also part of the picture. And at national level, too, London's circumstances are influenced by the National Strategy for Sustainable Food and Farming, by the 'Choosing Health' White Paper and by national planning policy.

Neither can London escape the power of market forces and the preferences of consumers. As Sir Don Curry, whose Commission into UK food and farming led to the formulation of the National Strategy for Sustainable Food and Farming, pointed out, a strategy that fails to acknowledge the enormous power of these forces would be doomed to fail before it even began.

Equally, however, the effect of a Strategy that simply accepts such forces as 'given' is two fold. Firstly, it would not be able to avoid responsibility. Secondly it would

represent a failure to recognise market forces and consumer preferences as dynamic and changing phenomena. Furthermore, policy instruments, regulatory frameworks, information campaigns, targeted investment and political leadership can actively shape and encourage the direction of change.

London has the means to do this; and must accept the responsibility to act. There are many things that can and should be done within London so as to bring about a food system that is fit for the 21st century. Equally, the responsibility for these changes is widely distributed. The Mayor and the London Food Board, an extensive array of organisations, as well as individuals themselves, all have some sort of role in bringing about a fairer, healthier and more sustainable food system for London.

The Mayor and the GLA have statutory powers which relate to London's economic and social development or concern environment in the capital. All are affected by the food system described. The capital's food system is, of course, inextricably linked to bodies, individuals and places outside London and often abroad. This is why, as often as may be necessary, the Mayor will work with and through other partner organisations to achieve his vision for London itself.

1.3 A Framework for the Strategy

The London Food Strategy has been developed along two dimensions. The first covers the entire food system, stage by stage, from the growing and farming of food, through to its consumption and the subsequent disposal of waste. The second dimension covers five themes, the complete range of areas of possible impact – health, environment, economy, social/cultural and security.

Using this structure, the strategy attempts to cover all issues but within a coherent framework, avoiding repetition and overlaps as much as possible as there are many issues which are inter-related and could be dealt with under the various headings above.

1.4 The significance of food in London

Given London's status as a urban metropolis, the opportunities and challenges for food are, in several key respects, distinct from those in the other English Regions. Most strikingly, farming is a significantly smaller share of the economy in London than elsewhere, contributing only 0.25% of London's GDP and 0.03% of the workforce. Much greater consideration in the capital is therefore needed upon other aspects of the food system, for example in terms of public health, business development, retail strategies and land use planning. While farming remains an important consideration for London, this strategy is, explicitly and predominantly, a food strategy.

Some food issues, for example food safety, the cost of food, or the pros and cons of the latest diet, are already salient features of residents' lives. Other issues remain on the margins, such as the impact of food distribution on CO₂ emissions, or the impact of illegal meat imports on health in London and on biodiversity in the country of origin.

Few attempts have been made to consider food as part of an *integrated and interdependent system*. Indeed, the full extent of food's contribution in London – whether as an economic driver, provider of health or a key means of celebrating the city's cultural diversity – is rarely acknowledged or fully capitalised upon.

Food influences, and is influenced by, many of the Mayor's existing key policy agendas. It lies at the heart of the Mayor's cross-cutting themes of health, equalities and sustainable development. Diet, health and wellbeing are inextricably linked. Food waste both requires new composting facilities as well as offering potential for emerging renewable energy technologies; it is a fundamental part of the city's cultural events and underpins the vitality and vibrancy of London's regional and local town centres.

The *importance* of food within London can best be summarised through the five principal themes of the Strategy framework¹:

Health: The relationship between diet and health is increasingly acknowledged. The improvement of Londoners' collective diets could deliver significant benefits ranging from the incidence of cancer and coronary heart disease to type-2 diabetes. Some aspects of Londoners' diet have already improved markedly over the past 50 years. The consumption of fresh fruit, for example, has risen substantially in London. However, further progress is required as wide inequalities in diet persist across different social and cultural groups, where two billion people globally suffer from chronic under-nutrition - diseases related to over-consumption are increasingly common. Air pollution associated with road freight in London has a number of major health implications, and the incidence of food-borne disease remains a key concern.

Environmental: The food system has significant environmental impacts. At national level it accounts for 22 per cent of UK greenhouse gas emissions; it is responsible for 41 per cent of London's "ecological footprint"²; while food preparation, storage and consumption account for between 10-20 per cent of the average household's environmental impact. More than one third of domestic waste in London is food related. All told, it has been estimated that close to half of human impact on the environment is directly or indirectly related to the operation of the food system as a whole. Conversely, the potential for the food system to deliver environmental benefits is therefore vast; whether it be the countryside stewardship role of farmers, efficiency improvements in the transportation of food or the influence that consumers could exert throughout the food chain by virtue of their purchasing choices.

Economic: The "agri-food" sector, comprising the agricultural, fisheries, food & drink, and catering industries, accounts for eight per cent of UK GDP and 12.5 per cent of UK employment. In London the sector is similarly significant, employing a total of nearly 500,000 people: the food and drink sector in London is the capital's second largest and fastest growing manufacturing sector; food retail businesses in the city employ tens of thousands of people; and London's thriving restaurant culture accounts for around one quarter of total GB activity in the sector and is a major factor in the city's attraction to tourists. All told, Londoners spend £8.8 billion each year in food retail outlets, the driver for a sector that is fast moving and dynamic. As new markets emerge in response to technological advancement, so do lifestyle developments and changing consumer trends and preferences.

¹ Information in these sub-sections is drawn from Section 4 of the Strategy, where full references are provided.

² **Ecological footprint.** This is the land and water area, measured in global hectares, that is required to support indefinitely the material standard of living of a given human population. The food component accounts for all foods consumed inside and outside the home. The ecological footprint of harvesting, production and transport, as well as food wasted, its management and the benefits of composting.

However, wide inequalities exist in terms of the proportion of family spending on food. Among high income households the spending on food accounts for only 6% of total spending, whereas among low income households, as much as 26% is spent on food. Inequalities affect employment, too, with long hours and low wages influencing some parts of the food sector.

Social & Cultural: While at its most fundamental level, food provides us with the energy to sustain life. For most Londoners, however, this has long been surpassed by its important and central role in socialising, providing pleasure and sustaining our health and lifestyles. Our social relationship with food is undergoing rapid change. British consumers now have an unprecedented level of choice from over 40,000 products from across the world, while changes in lifestyle are profoundly impacting on the way we prepare and eat food. Fewer Londoners now prepare their meals from scratch, while many now opt to eat out or 'on the go' – a demand catered for by more than 12,000 restaurants (half the nation's total), 6,000 cafes and 5,000 pubs and bars.

Food Security: The concept of "food security" has a number of interlinked elements, including the ability of the food system to withstand an emergency or crisis event (such as flooding, terrorist attack or disruption of oil supplies); the degree of potential self-sufficiency within London (which is in large part influenced by the health of the agricultural sector in London, its neighbouring regions and the UK as a whole); the traceability of food and, related to this, the fitness of food and drink for consumption. Food security is a salient issue across the entire food chain, whether in terms of primary production, the distribution and supply of food, or food retail and purchasing.

1.5 Contested Issues

Whilst the framework for the Strategy ensures a systematic treatment of the many issues at stake, the fact remains that food is a highly contested domain. Virtually every element of the food chain, and every area of impact, offers the opportunity for strong differences of view.

In the case of food, there appear to be four major areas of debate:

The status of 'choice'

Some argue that Londoners have unprecedented choice with regards to their food. Conversely, others argue that the degree of choice is more apparent but that too many Londoners do not have as many choices as they should. For instance, being able to maintain a healthy diet is difficult. In some cases it is impossible for many people, due to either expense or inaccessibility or both, to support such a lifestyle. Also related to the issue of choice is the extent to which the State can intervene. Intervention is generally regarded as legitimate if it ensures that individuals are forced to take into account damaging social or environmental consequences of their choices (through taxation for instance). It is more contentious where the State wants to effect changes in consumer preferences and behaviours to improve society's welfare overall and over the long term.

A concrete example of this last issue related to choice concerns the nutritional content of ready-cooked meals. Is it the responsibility of government (whether at national or regional level) merely to alert the consumer to the health consequences of their choice and allow that consumer to choose the unhealthy option if they wish or should government regulate unhealthy foods – for instance controlling the amount of salt in ready meals - in the way it regulates other potentially harmful substances?

The issue of scale.

Echoing much of the debate about the pros and cons of globalisation, there is a contest between forward paths that rely upon large-scale solutions, and those that depend on small-scale solutions.

The large-scale solutions put the major retailers centre stage, highlighting the economic efficiencies that have been and can be achieved by such retailers, and pointing to the benefits to consumers (unprecedented choice, convenience), employees (flexible work patterns, health & safety provision) and to UK plc's (through impacts upon inflation, employment, profitability). A light-touch regulatory pressure would ensure that policy issues that might not automatically be addressed by such enterprises progressively become part of the 'terms of competition'.

Furthermore, with the mainstream managed in this fashion, runs the argument that the city's smaller retailers and producers are not systematically marginalised, since London's sheer size creates innumerable opportunities for the capital's niche enterprises and diverse communities.

In opposition to this approach is a view that small-scale, bottom-up solutions are the way forward. Such a view may incorporate issues such as locally-owned and/or social enterprises, locally grown food, local markets, High Streets dominated by independent retailers not chains. Social and environmental benefits are inherent to this approach, the argument runs. Economic costs – since, initially at least, such approaches may well imply the food will be more expensive – actually represent a long-overdue readjustment. The current 'cheapness' of food, from this point of view, is purely financial: it is simply the operation of the economic system which 'externalises' the very real social and environmental consequences of the current operation of the food system.

The special status of Spatial Planning

Perhaps because of the legislative status of the London Plan, or as a result of the examples of other cities around the world, or perhaps because of the difficulties of co-ordinating effort across many domains, there exists among some within London a strong view that many of the weaknesses within the capital's food system could and should be addressed predominantly through the spatial planning system.

This view suggests that the protection of some land for horticultural purposes, the provision of sub-regional food distribution systems, the protection of street markets, farmers markets and specialist markets, the maintenance of the High Street and a variety of other food-related issues should be resolved through spatial planning.

It is indeed the case that London's spatial plan can contribute in a variety of ways to the delivery of the objectives in this food strategy and, in turn, there may be implications arising from this food strategy for the forthcoming review of the London Plan.

However, there are also inevitably limits on the ability of the planning system (and, by extension, the London Plan) to deliver against the entire food agenda. It is therefore important to acknowledge that, whilst planning can indeed contribute to the delivery of the London Food Strategy, many other strategic and institutional forces will need to make a contribution too.

The complexity of culture and science.

There are a number of other debates which affect policy-making in this area.

Genetically-modified food prompts strong responses on all sides, from those that believe it is unethical, or those recommending the 'precautionary principle'; but also from those that think that sound science is being wasted as a result of misplaced public fears. The divergence of international practice in this area bears out the strength of this debate globally.

Some of London's diverse communities rely upon food and food products that can only be grown elsewhere in the world. Continuing to meet their needs (and, indeed, the preferences of Londoners more generally, which are becoming more open to global influences) may conflict with those seeking to reduce the environmental impact of such transportation, particularly by air. The phrase 'food miles' has been coined to capture the distance food has travelled from the place it was produced to where it is consumed. However, to understand the environmental damage caused by the transportation of food, many factors, rather than just 'food miles', need to be considered such as the mode of transport and fuel efficiency³.

Organic food and farmers markets are seen by some as middle-class conceits; and by others as a vital component of a shift towards a healthier and sustainable food system.

The promotion of cooking skills is seen by some as a vital educational device to help consumers 'reconnect' with their food and rebalance their dependence upon processed/fast/corporate food. It is seen by others as an impractical response to their lifestyle choice, impacting directly on the time people – particularly women – need to give up in order to prepare meals.

1.6 The Way Forward

Despite these contested issues, there is much upon which there seems to be agreement. The role of food in contributing to the health and well-being of Londoners and its potential to play a part in addressing health inequalities is widely acknowledged. The environmental consequences of meeting the capital's food needs should be minimised. The food system in London is a vital source of employment and prosperity within London. Celebrating London's food culture is an opportunity for delight and civic pride. Ensuring a resilient and secure food system for the capital is vital.

There is also an acknowledgement that things have to change.

The extent and pace of this change is, perhaps, the final contested issue. Should change be incremental and evolutionary or is something more dramatic required?

The Mayor's London Food Strategy – which also represents London's contribution to a wider programme of work to promote a sustainable farming & food system in England in response to the Independent Policy Commission's Report *Farming & Food: a sustainable future* (2002), and Defra's subsequent National Sustainable Farming & Food Strategy, *Facing the Future* (2002) - is based on the premise that, whilst not revolutionary, changes need to be rapid and profound. It agrees with the national strategy in believing that what is needed is a culture change, a shift in the attitudes and behaviour of everyone involved with food.

These shifts will require concerted action. This Strategy identifies six priorities where all stakeholders should focus their effort in the shorter term.

³ See 'The validity of food miles as an indicator of sustainable development (Defra, July 2005 ²⁰⁵),

- **Ensuring commercial vibrancy.** Better targeted business support, including training, aimed to support farmers, specialist food manufacturers, specialist markets, distribution partnerships and a diversity of food 'clusters', as well as promoting tourism, London's retail offer and London's food culture.
- **Securing consumer engagement.** Programmes of awareness raising, education, skills and other support, particularly in terms of health, to enable all Londoners both to understand food issues and to be able to act accordingly.
- **Levering the power of procurement.** A range of actions to support and encourage both public and private sector organisations to incorporate sustainability within their food procurement decisions.
- **Developing regional links.** Developing brokerage and support systems to enable producers in and around London to understand and access the opportunities of the London market.
- **Delivering healthy schools.** A range of actions with both short and long term benefits, involving improvement to school meals, training and equipment for cooks, and education and cooking skills for pupils.
- **Reducing waste.** A range of initiatives to bolster London's efforts to tackle its food-related waste problems, for both households and commercial and public organisations, around reducing food and packaging wastage and increasing composting.

The Strategy and these proposed areas for action are not the start of the process; many important and innovative projects and initiatives are already underway.

Rather, the Strategy, for the first time, sets out an image of how London's food system should look in the not-too-distant future, an image that embodies a rapid but feasible rate of change to provide everyone with a sense of direction.

Not all the contested issues have yet been, nor can easily be, resolved. By working together it is hoped that the common ground can be extended not just to cover the issues, but also the means of addressing them. Failure to do so would diminish London's prospects of being able confidently to claim it has a world-class, sustainable city.

2 Policy, Commercial and Consumer Context

Given the breadth of food issues in London, each cutting across the range of health, environmental, economic, social/cultural and security themes, this section outlines the national and regional policy backdrop to food, considers the prevailing commercial environment and assesses current consumer and lifestyle trends.

2.1 Food: national, regional and local policy

This Strategy has its origins in a wider national and regional programme of work to develop a sustainable farming and food system. It has also been influenced by a wide range of successful and innovative work already underway across London. This section considers the farming and food policy context at each of these spatial levels.

National

In the aftermath of the Foot and Mouth Disease in 2001, the *Independent Policy Commission on the Future of Farming and Food* - chaired by Sir Don Curry - was established. The Commission provided a sobering assessment of the current system and concluded that the industry is on a path that cannot be sustained in the long term. Their vision for the future has a central tenet of *reconnection* within the food chain - between farming, the economy, environment and consumers.

In order to put in place the measures to address the Commission's main concerns, Defra produced *Facing the Future* (2002), a national strategy for sustainable farming and food. A number of developments have flowed from this. Each of the English regions has been charged with developing and implementing a *regional delivery plan*; partnership work is underway between government and commercial and industry bodies to develop the recently-launched consultation on a *Food Industry Sustainable Development Strategy*; while a number of specific initiatives have been established, including the *Public Sector Food Procurement Initiative* and the *Organic Action Plan*.

A number of Government agencies are also undertaking significant programmes of work on food. For example, the Countryside Agency has developed the "Eat the View" programme, the Food Standards Agency – in addition to its core food safety role – has recently established the "Eat Well" consumer health awareness initiative, while the UK Sustainable Development Commission runs a *Healthy Futures* project on behalf of the NHS. Similarly, a number of non-governmental organisations are leading on farming and food issues, notably Sustain and the Soil Association.

Regional

There is a strong regional element to the delivery of farming and food initiatives. Following the national strategy, SEEDA and the Government Office for the South East published its regional delivery plan *Farming and Food: Our Healthy Future* (2003). While covering the South East region and London together, the plan recognised the different challenges and opportunities facing London and, accordingly, recommended the development of a specific food strategy for London.

In addition to the regional delivery plans, a range of organisations - including Defra, Food From Britain (FFB), the Regional Development Agencies, the Food Standards Agency and the Countryside Agency - are working together on a new structure of

support for regional food initiatives, covering trade development, competitiveness and consumer awareness.

Furthermore, Regional Food Groups (e.g. *Taste of Anglia*, *Taste of the West*) now exist in all the regions, with the exception of London. These are formed primarily of industry members involved in the production/preparation and marketing of speciality food and drink, who provide a range of market development services such as the preparation of trade directories and publicity material, public relations activities, information exchanges and organising shows and exhibitions.

London

In September 2004 the Mayor of London established the London Food Board to lead on food matters in the capital. The board, chaired by London Assembly member Jenny Jones and funded through the London Development Agency, represents the diversity of London's food system and has been working during the first months of its existence on the development of this strategy.

The LDA has a dedicated Food Strategy Unit to set out a direction and framework for the food system in London. The role of the London Food Board is to help steer and develop food policy for London, working jointly with regional and local agencies, businesses and voluntary sector groups.

A number of London Boroughs, including Newham, Ealing and Greenwich, have also developed food strategies which have built partnerships between, for example, Primary Care Trusts, Environmental Health, Planning and Education.

Specific schemes & initiatives

At a practical and delivery level there is already a range of food-based initiatives being undertaken across London. These involve local authorities, NGOs and others, and include pilot trials in specific areas (e.g. in schools and hospitals) and community projects in individual neighbourhoods. Sometimes these are recognised explicitly as "food initiatives", but in many cases food is a central means of achieving other policy agendas, for example social inclusion, public health or training and skills.

Similarly, a number of pilot projects and good practice examples from across the UK could potentially be implemented in London. Section 6 of this document includes references to a number of existing schemes in London and good practice examples from the across the UK.

2.2 Food: Key policy linkages

In addition to food-specific policies and strategies, many other policy domains impinge upon the food system. Some of the major linkages are highlighted in this section.

At **national** level, there are 5 principal considerations.

- **Health.** The *Choosing Health: Making healthy choices easier* White Paper, together with its associated *Food and Health Action Plan*, and initiatives such as the "5 a Day" programme, the "School Fruit and Vegetable" scheme and ongoing efforts to ensure food safety and food hygiene.

- **Environment.** Notably the new UK Strategy for Sustainable Development, the work of the UK Sustainable Development Commission, the national Waste Strategy and the work to implement the Kyoto protocol on climate change.
- **Economic.** As well as the general process of managing the UK economy through, for example, the pursuit of competitiveness and the maintenance of low inflation, the Treasury's "Tax and the Environment: Using Economic Instruments", the work of the DTI and the over-arching operation of the Planning & Compulsory Purchase Act of 2004 all have an impact on the operation of the UK food system.
- **Social/Cultural.** Including the Sustainable Communities Plan from ODPM, the National Strategy for Neighbourhood Renewal, and the work of key departments such as the Home Office and the Department for Culture, Media and Sport.
- **Security.** Notably the work of UK Resilience and the Civil Contingencies Secretariat.

Turning to London, there is a wide variety of linkages to other Mayoral strategies⁴, some of the more significant of which are mentioned below.

The importance of **agriculture** is explicitly mentioned in the London Spatial Development Strategy (The London Plan), the Biodiversity Strategy and Mayor's Animal Welfare Framework. The London Plan seeks to encourage and support a thriving agriculture sector in London as well as protecting the greenbelt, while the Biodiversity also highlights the importance of greater public contact with the natural world - be it through allotments, community gardens or city farms – and affirms London's opposition to commercial or experimental release of Genetically Modified Organisms (GMOs).

In terms of **food retail provision**, the London Plan again has great importance. For example, it focuses on the need to maintain and improve retail facilities, and to prevent the loss in provision of essential convenience shopping, as well as highlighting the importance of London's town centres in providing sustainable access to food. Alongside the London Cultural Strategy, the London Plan outlines several key policies and proposals to develop **culture and tourism** in the capital, which food both underpins and enhances.

The importance of delivering **London's economic success** – in which the food sector plays a key role - is addressed through the Economic Development Strategy, as well as the London Plan. The importance of supporting enterprises' competitiveness and boosting productivity are addressed. This also includes the marketing of London as a gateway to rest of UK and the promotion of London's diverse cuisines as mentioned in the Culture Strategy.

Existing synergies between the Mayoral Strategies on the subject of transport have important ramifications for the **distribution** of food. For example, London's Air Quality, Municipal Waste Management, Ambient Noise and Energy Strategies combine to address the need for accelerated take-up of cleaner and quieter vehicle technologies and development of a full range and integration of transport modes.

Food consumption, although affected by all other Mayoral Strategies, is directly addressed in the London Children and Young People's Strategy (which incorporates the implementation of the National Healthy Schools Scheme and a reduction in the level of harm caused to children by alcohol). The wider health of Londoners is

⁴ Appendix 2 provides a detailed schedule of these linkages.

integral to all Mayoral Strategies and is promoted specifically through the London Health Commission.

The Mayor's Municipal Waste Management Strategy is also a key document in terms of **food-related waste**. It aims to exceed national recycling and composting targets for household waste and seeks to consider regulatory measures such as extended producer responsibility and economic instruments such as eco-taxes. This has implications for, among other things, the promotion of home composting, local authority kitchen waste collection schemes, community composting sites and composting facilities/collection rounds for fruit and vegetable markets.

Furthermore, the avenues available to tackle organic waste are reinforced by the Mayor's Waste and Energy Strategies, which suggest that where waste cannot be composted London should explore new advanced conversion or waste treatment technologies, such as anaerobic digestion, which satisfy the Renewables Obligation Order 2002.

2.3 The Commercial Environment

The commercial environment for the many food-related enterprises operating in London is complex and fast-moving. As well as the many public policies referred to in sections 2.1 and 2.2, food-sector enterprises find themselves in an intensely competitive environment, with forces operating at all spatial levels – from international to neighbourhood – as well as the perpetual challenge of 'consumer preferences' (see section 2.4, below).

International Issues

Food is a global market with an estimated value of \$2.8 trillion annually. As such, it is affected to a significant extent by the rules governing international trade, as well as factors such as the low cost of transport relative to other production costs, relative labour costs around the world, competition regulations, state aid rules, patterns of subsidy around the world, and so forth.

These factors have combined over time to favour the development of long and complex international supply chains: and in many respects, Londoners have benefited hugely from these developments - the range of products available is as diverse as London's population.

Although they are beyond the scope of this London Food Strategy, it is nevertheless the case that, for example, the negotiations of the World Trade Organisation (WTO) and the new reforms to the European Common Agricultural Policy will indeed affect London, and will need to be borne in mind as this strategy is taken forward.

National Issues

Food is a highly competitive sector in the UK, as news of Britain's food retailers' changing fortunes regularly illustrates. It is also a highly consolidated sector in the UK – a small number of key retailers and producers between them account for a large proportion of the market. Their appeal lies in their ability to supply consumers, wherever they are, with a wide range of products, all year round. They have a global reach, and their supply chains provide consumers with a historically unprecedented choice of products, convenience and low prices. The cost of food has fallen steadily in real terms throughout the post-war period, and the average family expenditure on food has likewise fallen markedly.

In recent years many, particularly large, retailers and food businesses have begun to address wider health, environment and social issues. Representative bodies such as the British Retail Consortium and the Food & Drink Federation have produced sustainable development strategies, whilst the latter also helps its members address climate change issues; retailers including Sainsbury and Waitrose have extensive environmental management strategies in place (and increasingly use their achievements in this regard in their advertising); retailers, including Tesco and Morrisons, have adapted to the regeneration agenda such that issues of sensitive store location and mixed retail/residential developments are ever-more frequent; retailers such as Asda and Tesco participate in the EU emission trading scheme; while the rising awareness of healthy eating among the general public, policy on public health and corporate profitability strategies are, in many ways, coinciding to positive effect.

For example, Marks & Spencer have announced their coffee shop chain Café Revive will only be stocking Fair Trade coffee; Sainsbury's have signed a deal to supply 10% of energy from renewable sources; Heinz are reducing sugar and salt content in their soup in line with Food Standards Agency guidelines; and Birds Eye have removed artificial flavours, colourings and preservatives from their products.

Many smaller enterprises, by contrast, are less able even to begin to meet the wider challenges of sustainable development (in common with SMEs throughout the economy) as they vie for financial survival; while the efforts of larger enterprises are frequently attacked as inadequate or superficial.

From their own perspective, food businesses nevertheless face a series of challenges (aside from the general one of meeting consumer demand), summarised briefly below⁵.

- **Legislation and enforcement.** Many enterprises, particularly smaller ones, struggle to cope with the volume and scale of food-related legislation, and frequently consider it 'unfair'.
- **In-town/out-of-town.** Not surprisingly, smaller enterprises and/or those with a particular (investment) interest in town centres are unhappy at the way in which out-of-centre retail development has continued; and many call for improved investment in/support to High Streets.
- **Transport & logistics.** Many enterprises are unhappy about levels of congestion; some (particularly smaller enterprises) are unhappy about the Central London Congestion Charge; many acknowledge that the pattern of food transportation is inappropriate from a health/environment perspective; and some (particularly smaller enterprises) are keen on shared logistics systems.
- **Labour issues.** Many enterprises are struggling with skills issues, either in terms of securing people with the right skills, or funding training to deliver skills; and some acknowledge that issues of low pay and mediocre career prospects (either real or perceived) are problematic for the industry.
- **Diversity.** Some niche enterprises understand their target market well and prosper accordingly; some, however, struggle to understand the demands of complex and/or different communities and may need help to adapt.

⁵ This section draws upon a limited survey exercise undertaken during the development of this Strategy, as well as on relevant corporate documentation; and it should be noted that, even within the commercial food sector, there are occasionally very strong differences of opinion – see 'Contested Issues' in the Introduction.

- **Price wars.** Some smaller retailers and producers believe that are systematically disadvantaged by the power of large corporations; some, by contrast, feel that the focus of the large players on price competitiveness creates space in the market for differentiation among smaller players.
- **Markets.** Enterprises operating from markets – whether street markets, farmers markets or wholesale markets – are firmly of the view that government and local authority policies have for many years discriminated against them, and this should be redressed.

A common denominator across these issues are concerns that the power of very large retailers and producers is to the detriment of independent stores (and hence the social and economic viability of local neighbourhoods), alternative markets, the wide range of suppliers who cannot wield the same influence on prices, and even government's ability to regulate the sector.

A major criticism aimed at the current system is that it is dependent on externalising environmental and social costs (e.g. CO₂ emissions, health impacts) which are borne not by companies or consumers, but society as a whole. On a global level, furthermore, concerns have also been raised about the inequality in power between a concentration of food companies on the one hand, and producers in developing countries on the other.

It is important to recognise that this system has co-evolved over the past 50 years alongside – and in combination with - a number of other social and economic developments, including the growth in car ownership, the cost of travel, technological development, changing labour force participation among women, lifestyle shifts and changing consumer preferences/expectations. It is the interdependent evolution of these factors which has shaped the current operation of the food system – and it signals the importance of a co-evolutionary way forward, rather than a blunt 'fix it' approach.

London Issues

Many of the national issues referred to above relate directly to London. In addition to these, a number of London-specific issues warrant mention.

- London's population is expected to grow dramatically over the coming decade, with important (and, in certain key respects, uncertain) impacts on both the level and pattern of demand for food; and, by extension, impacts on transport/distribution, retail provision, food security and other policy areas⁶.
- London's status as a world city ensures a high degree of access to and trade with global markets, benefiting both Londoners and London's businesses, particularly London's diverse communities.
- Demand in London for ethnically- and culturally-specific food – such as Kosher and Halal – is both much higher than elsewhere in Britain (reflecting both London's sheer size as well as its exceptional diversity) and growing. Ensuring that all London's diverse communities continue to have access to culturally-appropriate food means that there are limits to the extent to which 'local' food can meet London's needs.

⁶ "Convenience Goods Floorspace Needs in London" GLA 2005 will inform the development of a strategic framework for more local studies of the need for convenience retail (which includes food retail) for individual boroughs and development proposals.

- London's complex fabric of retail provision and town centre network ensures that the majority of Londoners benefit from convenient access to a competitive range of food-purchase options; while the density of the city mean that a higher proportion of food shopping can (in theory at least) be conducted without the use of a car.
- London's 'eating out' culture is extremely well developed – there are more than 12,000 restaurants in the capital, serving every conceivable cuisine, across the full range of cultures, and including an extraordinary array of health-specific foods – but inevitably London's restaurants face their own challenges, in terms of recruitment, property costs, access to wholesale markets and so on.
- Both labour and property costs in London are higher than elsewhere in Britain and, for food processing, distribution and manufacturing activities especially, this poses particular challenges.

Ultimately, London offers food-related enterprises a remarkable mix – on the one hand, a great concentration of diverse demand, presenting tremendous opportunities for success; and, on the other, fierce competition at every level, bringing failure to those that fail to compete.

2.4 Lifestyle trends and consumer preferences

In London, as elsewhere in the UK, our relationship with food has undergone profound change in response to lifestyle changes and shifting consumer preferences and expectations. Seasonality, for example, is no longer the driver of food choices that it once was given the global reach of the supply chain; while the long hours working culture of the UK (and London in particular) and increasing female participation in the workforce have reduced the amount of time for cooking and shifted traditional patterns of responsibility for shopping, cooking and eating.

Furthermore, and in addition to the market trends outlined in section 2.3, the consumer has also had a part to play in the co-evolution of the current food system. As a society, we are richer, busier, more culturally diverse and more cosmopolitan, and as a result we have come to demand ever more convenient, elaborate and exotic food.

Consumption and lifestyle patterns are influenced and shaped by a complex and co-evolved set of interactions between demography and settlement patterns, technology and markets, social structure and culture, and institutions¹. In London's case, given its rich history and diverse communities, these patterns are even more complex than in many other locations.

There are also times when the prevailing institutional and social constraints acting upon consumers, which the OECD refer to as the "infrastructure of consumption", leads to consumer "lock in", a situation where a particular technology or market trend becomes so embedded in patterns of behaviour that it continues to dominate even when (apparently) superior alternatives exist. The dependence of modern lifestyles on the car is one such example of a consumer "lock in".

Given these wider forces that both influence - and are themselves influenced by - consumer and lifestyle trends, the notion of "consumer sovereignty" is not sufficient on its own. As Jackson (2004) notes, the policy framework inevitably shapes consumer behaviour and lifestyles, whether directly (e.g. through planning, fiscal

measures or regulation) or through its influence over the social and cultural context within which people make their individual choices.

For London – and for this Strategy – what this means is that the move to a more sustainable and world-class food system for the capital will require action on several fronts simultaneously. Simply providing better information to consumers will have no effect if they are unable to act upon their new knowledge; equally, producers may be unwilling to innovate if consumer demand is not apparent. Sections 5 and 6 of the Strategy set out how such action can be co-ordinated and put into effect.

3 A Strategic Framework for London

This section presents the architectural framework for the London Food Strategy. Given the complexity and range of issues, it is crucial to develop a means of capturing the full spectrum of issues relevant to food in London.

In the case of the London Food Strategy, therefore, a systematic approach has been designed to comprehensively account for all the food issues that arise in London and to illustrate the various relationships within the system. The framework is based upon three main components.

- **The eight stages of the food chain** comprise: primary production; processing and manufacture; distribution and transport; retailing; food purchase; food preparation and cooking; consumption; and disposal, and presented in each row of the framework. This allows specific components to be identified and their relationships explored.
- **The five key policy themes** are health, environment, economy, social & cultural and food security, presented in the columns of the framework;
- **Ownership, providers and power** outline the range of actors involved throughout the food system, presented in the second column of the framework.

The use of the framework as a tool to “map out” the food system in London not only ensures that all issues are covered, but also demonstrates how embedded they are within the food system. Some issues fit easily within a single quadrant – see the diagram opposite - and are specific to a single stage of the chain and/or a key theme. Others appear at multiple stages or have, for example, a range of implications.

All elements of the framework do, of course, have a spatial dimension. Not only are the various elements of the chain distributed differently across London (agricultural land is concentrated in outer London; manufacturing activity is concentrated in a number of industrial locations; retail provision is distributed across London’s town centre network and out-of-centre developments), but so too are the strategic themes (health inequalities are more severe in some locations than others; environmental impacts are borne more heavily in some locations than in others).

This spatial dimension puts the Mayor’s Spatial Development Strategy for London – the London Plan – into a particularly important position with respect to the London Food Strategy. In due course, particularly in the period leading up to the first alteration to the London Plan, the full ramifications of this relationship will need to be worked through. At the present stage, key linkages to the London Plan are highlighted in Appendix I; and, in the Action Plan (Section 6), the London Plan is identified as key delivery ‘partner’ where appropriate.

More generally, the framework is designed to take into account the dynamic and interconnected nature of London’s food system. For example, there are a variety of *feedbacks* within the system - pressure at one stage (e.g. consumer demand) creates a pressure elsewhere (e.g. in terms of primary production and manufacture). The food chain might also vary in length in relation to the *number of stages* - so, for example, a product grown in a London garden may simply involve primary production and then eating, in contrast to commercial practices which also see the product potentially manufactured, certainly distributed, sold, bought, possibly prepared, eaten and then disposed of.

Furthermore, the *geographic length* of the food chain varies according to the product, method of production or control of the supply chain. So, for example, primary production may occur in London, in the UK, or internationally, which will itself influence the rest of the chain (e.g. distribution distance).

The framework is used throughout the remainder of this document to structure the material: in Section 4, the eight stages of the food chain are treated in turn as the 'state of play' is spelled out; in Section 5, the vision for food in London is articulated for each of the eight stages; while in Section 6, actions are identified for each stage.

3.1 The Strategy Framework

	Stages of the Food Chain	Key organisations	Health	Environment	Economic	Social & Cultural	Food Security
Supply factors	Stage 1: Primary production	Abattoirs, allotments, city farmers, community growers, cooperatives, farmers, fisheries, market gardens.	Public access to nature (health benefits), labour standards & pesticide exposure, health & safety, farmer welfare, public health and antibiotics use, nutrient content, animal feed (quality and sourcing of).	Biodiversity, energy/water use, climate change, agri-environmental schemes, pest-icides, GM crops, non-food crops, flooding, soil erosion, environmental management, soil fertility, quality assurance standards, pollution (air, water & soil), fishing by-catch, fish stocks, bush meat trade.	Income, employment, labour skills, access to markets, farming methods, diversification, non-food crops, crime (incl. vandalism, fly-tipping, theft), subsidies, economies of scale and farming intensity, quality assurance standards.	Public access to nature (educational benefits), labour standards, animal welfare, migrant labour & gang masters, quality assurance standard, ethnic food production, skills.	Biodiversity & genetic crop diversity, energy & water scarcity, GM crops, climate change, flooding, soil erosion, skills, potential for self sufficiency, animal & human disease, food scares.
	Stage 2: Processing & Manufacturing	BME processors, farmers, large processors, packaging companies, SME processors.	Health & safety, public health (nutrition, additives & flavourings), labour standards.	Energy use (incl. heating & cooling), climate change, air quality, water use, packaging, waste & recycling.	Employment, skills, income, access to markets.	Labour standards.	Disruption to fuel supplies, human & animal diseases, food scares.
	Stage 3: Transport, Storage & Distribution	Distribution companies, farmers, logistics companies, retailers & supermarkets.	Mode of transport impacts, vehicle design, delivery schedule, pollution (noise & air), congestion, infrastructure maintenance, nutrition.	Mode of transport, vehicle design, load profile, driver training, fuel type, air quality, food miles & CO2 emissions/climate change, energy use, packaging.	Mode of transport & costs, employment, vehicle design, load profile, information & communication technology, refrigeration, storage & warehousing.	Labour standards, skills & training.	Emergency/disruptions, oil dependency, 'Just-in-Time' delivery, mode of transport, infrastructure maintenance, international relations, climate change.
Demand factors	Stage 4: Food Retail	BME retailers, catering companies, convenience retailers, direct selling (box schemes internet, markets), importers /exporters, target groups, markets (street & farm), off licences, public sector, restaurants, SME retailers, co-operatives, social enterprises	Transport impacts, food safety and hygiene	Transport impacts, congestion, climate change, production methods.	Price, employment, pricing system (e.g. farm gate price) & contract criteria, quantity, reliability, WTO rules, import/export duty, quality assurance standards.	Eating out and 'on the go'	Emergency disruption to supplies, price, quantity, reliability, food access, nutritional value, transport infrastructure, climate change, biodiversity, energy supply, diversity of supply.
	Stage 5: Purchasing Food	Consumer, public procurement.	Nutrition, consumer preference, labelling.	Transport mode, vehicle efficiency, journey profile, air pollution, congestion, energy, consumer demand for organic food.	Household incomes, food price, consumer demand & preferences, emerging markets (e.g. ethical goods, internet shopping).	Lifestyles/habits, income, convenience & physical access, work patterns, cooking skills, nutrition /food knowledge, education, consumer preference, labelling.	Emergency/disruption to supplies, diversity of purchasing.
	Stage 6: Food Preparation, Storage & Cooking	Catering companies, community groups, individuals, public sector, restaurants, take-away outlets.	Lifestyles/habits, nutrition/vitamins, skills, ethnic food and health & safety, food safety and hygiene, target groups (age, ethnicity, pregnant mothers).	Energy & water use, climate change, air quality, cooking skills & shopping preferences.	Skills, cooking equipment, employment.	Lifestyles/habits, skills, cooking clubs, ethnic food and ethnic food skills, work patterns, target groups, cultural/special events.	Skills, facilities, disruption to utilities.
	Stage 7: Eating & Consumption	Business, care homes, community groups, individuals, public sector, restaurants.	Lifestyle habits, nutrition/vitamins, health/well-being, breast-feeding, dieting, nutrition standards.	Climate change, food-related litter & disposable packaging	Eating out, tourists, ethnic food, corporate procurement, public procurement, taste/quality, take-away, employment.	Lifestyle habits, family groups, breast-feeding, recipes, work patterns, cultural/special events, maslow, dieting, books & magazines, recipes, work patterns, take-away, cultural /special events.	Contamination of food & water supplies.
	Stage 8: Disposal	Community groups, households, individuals, local authorities, markets, manufacturers public sector, re-tailers, restaurants, waste companies.	Possible health impacts from landfill as well as visual pollution and smell; possible health impacts of incineration	Loss of land to accommodate landfill, leachates from landfill, methane and CO2 emissions, emissions from incineration, congestion and air quality issues from the transport of waste.	Transport costs of collection/infrastructure, increasing costs of waste management, need for investment in new facilities, job creation through recycling.	Waste recycling and composting collections, home composting, lifestyles/habits (e.g. convenience food and eating out), propensity to compost influenced by lifestyles/habits.	Threat of disruption to the collection and disposal of waste

4 Food in London: The Current “State of Play”

Using the framework presented in the previous section, this detailed fourth section of the strategy presents the existing evidence base on food in London.

For each of the eight stages of the food chain, Section 4 presents a mix of information, from a wide variety of sources, covering (except where the issue is not relevant, or no relevant information has been found) the five key policy themes of health, environment, economy, social & cultural, and security.

There is a great deal of detail in this section, fleshing out the broad brush comments made in Sections 1 (Introduction) and 2 (Context). The detail provides the platform from which was developed the vision for London’s food system presented in Section 5, and the evidence to justify the specific policies and actions proposed in Section 6.

STAGE 1: PRIMARY PRODUCTION

Background

- There are 12,064 hectares of farmland in Greater London, representing approximately 8% of London's land area. This proportion is significantly smaller than in the South East (62%) and England as a whole (81%)².
- Of the 472 registered holdings many are small (over 60% cover 5 hectares or less³) and located predominantly in five boroughs which between them contain 85% of London's farmland: Bromley (30%); Havering (24%); Hillingdon (13%); Enfield (12%) and Barnet (6%).
- London's commercial farmland is primarily used for the production of arable and horticultural crops.

Health

- Levels of trace minerals in fruit and vegetables fell by up to 76% between 1940 and 1991⁴.
- The health benefits of organic food (as opposed to "conventional" food) have been the subject of recent debate. The Soil Association, for example, claim that organic foods contain higher levels of Vitamin C and essential minerals⁵. A study at Aberdeen University suggests that organic milk contains higher level of Omega-3 fatty acids, while a Danish study⁶ found that Organic crops contain 10-50% more antioxidants than conventional crops.
- However, it is important to note that evidence is often scarce and contested, and there is a diversity of approaches within "conventional" agriculture. Therefore, a level of caution is required in interpreting the current evidence base to avoid over-simplification of the issues.
- Pesticide exposure is an issue of concern both for the farm workers applying the chemicals (acute exposure) and the general public ingesting them (chronic exposure). While evidence concerning the health impacts of exposure to pesticide residues is scarce, government expert groups have expressed the need to minimise exposure on the grounds of precaution⁷. There is concern, in particular, about the so-called "cocktail effect" which refers to multiple pesticide residues acting in combination, producing a synergistic impact *over and above* the sum of the individual residues⁸. Children may also be particularly susceptible to pesticide residues⁹.
- The use of antibiotics in agriculture is rising. Evidence now links the use of antibiotics in animal feed with rising numbers of humans infected with bacteria that respond poorly to treatment with the same antibiotics¹⁰.

Environmental

- Studies have put environmental benefits from agriculture (in the UK) in the range of £600-900m per year, and damages at £1-1.5bn (from the effects of emissions, water pollution and impacts on biodiversity)¹¹.
- Agriculture currently has a number of **negative environmental impacts**. For example, it makes a significant contribution to total UK emissions of greenhouse gases, accounting for 7.5%¹²-12%¹³ of CO₂ emissions, 40% of methane emissions, and 83% of ammonia emissions¹⁴.
- Agriculture represents a significant, but declining, proportion of Category 1 and 2 water pollution incidents in UK rivers (the most serious categories) - in 2003 it accounted for 13% of incidents, compared to 18% in 2001¹⁵. There has been a marginal improvement in the concentration of phosphate and nitrate in rivers in the Thames region, although when compared with the other regions they still rate relatively poorly (recording the 2nd and 3rd highest levels, respectively).
- There has been a decline in hedgerows which provide valuable habitats for many species. While this decline has been halted in the past 10 years, the number remains significantly below the number in 1984, and furthermore the Countryside Survey 2000 showed that the condition of habitats in the wider countryside continues to decline¹⁶.

STAGE 1: PRIMARY PRODUCTION (cont'd)

- Wild bird populations are considered to be a good indicator of the broad state of the wildlife and countryside. The overall index of populations in British breeding birds has been relatively stable over the last 20 years. However, the farmland birds index almost halved between 1977 and 1993, while the woodland bird index fell by about 30% between 1974 and 1998. Rare bird populations have generally fared better due to conservation efforts¹⁷.
- Britain uses, on average, 0.58 tonnes of pesticides for every square kilometre of arable land, more than twice the OECD average¹⁸. Pesticides can contaminate water used to supply drinking water (with the total annual cost for removal estimated to be £120 million¹⁹) and damage biodiversity. There are also possible impacts on health (see "Health").
- In response to these environmental pressures there have been a number of recent **positive developments**. For example, over 1 million hectares of land in England are now managed through Agri-environment schemes (compared to 400,000 hectares in 1995), covering nearly 12% of the total agricultural area of England²⁰.
- The environmental impact of agriculture varies according to the type of farming. For example, certain forms of meat production (e.g. intensive cattle ranges) place greater demands on resources (e.g. water, energy, feed) than cereal production.
- The agricultural process is significant – comparisons between organic and "conventional" systems (although crude given the diversity of "conventional" systems) have shown environmental benefits. For example, it is estimated that organic farms use 50-70% less energy per unit of production (mainly as a result of different fertiliser consumption, depending on the product); there are clear benefits to biodiversity; soil erosion and deterioration is expected to be lower (although there is little empirical evidence as yet); and there is expected to be a reduction in the run-off of nitrates (although again evidence is scarce)²¹. Similarly, certain fishing practices result in very high levels of "bycatch" (non-target species which are caught in nets, killed and discarded). For example, the bycatch-to-shrimp ratio can reach 10:1 in some fisheries because of the sea-bed trawling methods applied²².
- There are currently no **Genetically Modified crops** being grown commercially in the UK and no commercial cultivation is expected before 2008 at the earliest. The Government has concluded that there is no scientific case for a blanket ban on the cultivation of GM crops in the UK, but that proposed uses need to be assessed for safety on a case-by-case basis²³.
- However, a number of local authorities have declared themselves "GM Free" areas. 45 Local Authorities have joined individually, while the Local Government Association (LGA) - representing around 500 Local Authorities - is a supporter of a "Five Year Freeze" campaign.
- In London, the Mayor opposes the commercial or experimental releases of Genetically Modified Organisms (GMOs) into the environment in London (Proposal 32 of the London Biodiversity Strategy).
- London's demand for **illegal meat imports** and endangered species (such as tiger parts in traditional medicines) has a huge impact on biodiversity in the country of origin.
- Latest research suggests the impact of **climate change** on both crop yields and crop quality (protein content and toxin levels) will be more severe than previously thought²⁴. Studies have suggested that the beneficial "fertilisation" effect of increased levels of CO₂ could be less than previously estimated. Furthermore, agriculture will itself impact on the climate system. Crops will use water more efficiently and lose less to the atmosphere under increased levels of atmospheric CO₂, and if this occurs over a sufficiently large region it could lead to reduced rainfall in that region.

Economic

- Farming in London contributes £32 million to the economy, accounting for around 0.25% of London's GDP²⁵.
- There are 1,310 farm employees in London, representing 0.03% of London's total workforce²⁶.

STAGE 1: PRIMARY PRODUCTION (cont'd)

- Farmland in London declined by 30% between 1965 - 1997²⁷. Although horticultural holdings in London continue to represent 17.5% of all farm types (compared to a UK average of 3.8%), they have declined due to urban development pressures and, in particular, the development of Heathrow. Livestock numbers are steadily dwindling, and only seven dairy farms now remain.
- The last 50 years have seen a **significant reduction** in agriculture's share of the UK economy: in 1950 it accounted for 5% of GDP and 6% of employment²⁸; now the figures stand at 0.8% and 1.8% respectively²⁹. Since the early 1980s there has been a shift in the composition of the labour force with an increase in the proportion of part-time workers (rising from 25% to around 50% of the total). The decline in both the number of farm holdings and the agricultural labour force in the UK is itself part of a wider EU trend³⁰.
- The long term trend in aggregate income has been downwards³¹. Following a sharp decline in the late 1990s – culminating in a low point in 2000 - total income from farming increased for the third year in a row in 2003, so that, in real terms, it is now 77% above the level in 2000 but still less than half the peak in 1995. Average *net income* in 2003 was £12,200, while the provisional projections for 2004 suggest a significant increase to £20,500.
- The headline figures mask variations across different regions of the UK, farm types and sectors. For example, while 20% of farms have net incomes of £30,000 or more, 40% have net incomes of less than £5,000. Furthermore, sectors such as pigs and poultry are in a relatively healthier position than dairy or lowland cattle and sheep.
- There has been a reduction in the number of small abattoirs from 780 in 1987 to 278 in 2004 (of which 27 are organically certified)³².
- The UK market for cut flowers is worth £1.2 billion annually, with 85% currently imported. There are currently no regulations governing the use of pesticides on cut flowers, and there are concerns about the environmental impact of the industry and working conditions³³.
- The majority of farmers are 45-54 years old and there are concerns about the lack of younger recruits and the image of the industry.
- **New economic opportunities** are emerging.
 - 48% of UK farms have a diversified business³⁴. The average output of diversified enterprises on farms is highest for food processing and farm retailing, compared with letting buildings, tourism, and sport & recreation.
 - Non-food crops offer growth potential: Defra's Energy Crops Scheme provides grants towards the cost of establishing producer groups set up to supply short rotation coppice to power stations and other energy end users (although adoption of these technologies has been slow to date – only 4% of the grants available for planting energy crops have been taken up by farmers).
 - UK supply of organic food was up from 30% in 2002 to 44% in 2003, and production is set to reach Defra's target of 70% of total UK organic supply by 2010³⁵. Current supply of organic produce such as eggs, milk, chicken and turkey is typically 100% sourced from the UK³⁶, although supply of apples (3%) and pears (6%), for example, is much lower (compared to 20% and 17% respectively for "conventional fruit").
 - The development of farmer cooperatives - with the potential for economies of scale, purchasing power and marketing - is more pronounced in other EU countries. For example, the market share of fruit and vegetable cooperatives in the UK is 35-45% compared to 60% in Germany³⁷.
- A survey of London Farmers shows that one third want better opportunities to tender to supply food for institutional catering contracts in schools, hospitals and prisons. The survey also shows farmers face challenges from trespass and vandalism, illegal camping, fly tipping; while eight out of ten farmers now sell produce direct to the public³⁸ (via farm-shops, farmers' markets, etc.)
- A barrier to farmers adding value to their produce is the lack of knowledge and self-confidence³⁹.

STAGE 1: PRIMARY PRODUCTION (cont'd)

Social & Cultural

- There is widespread public opposition in London to GM foods⁴⁰.
- There are concerns that the decline in farming has a more widespread impact on the viability of rural areas. The Policy Commission on the Future of Farming and Food found that there is a very strong interdependence between farming and the wider rural economy.
- Farmers and farm workers are identified as a key suicide “risk” group⁴¹. Agriculture also has the worst fatal injury rate of any broad employment sector (on average one fatal accident per week). Over 100,000 working days are lost a year as a result of accidents in the agriculture sector, costing the British economy around £130 million⁴².
- Animal welfare conditions are currently the subject of competing pressures. On the one hand, consumer pressure, assurance schemes and legislation (e.g. the impending EU directive on the Welfare of Laying Hens) raise standards. In contrast, competition from countries with lower animal welfare standards (and therefore lower costs) represents a downward pressure on standards – the so-called “race to the bottom”. The increase of scientific knowledge alongside the improvement of technology over the last twenty years has led to the development of intensive farming methods. These have resulted in the use of animal breeds with production rates that were previously inconceivable, raising concerns for animal welfare. Furthermore, there are specific concerns about the transportation of live animals (in 1998 12.3 million pigs, cattle and sheep were traded live, within the EU⁴³).
- The Chartered Institute of Personnel and Development estimates that a third of companies are recruiting migrant workers to fill a range of jobs – many of which are in the agricultural, food processing and hospitality sectors. In London, that figure may rise to more than half. However, recent concerns have been expressed about the extent of dependency on illegal and legal migrant labour in the UK agricultural sector, the presence of “gangmasters”, and the working conditions/lack of employment protection safeguards for these workers⁴⁴.
- There are 59 City farms in the UK, 18 of which are in London. Across the UK, city farms and community gardens provide approximately 2,500 training places for adults with learning disabilities each year; employ the equivalent of approximately 500 full-time paid staff and over 15,000 volunteers; have a combined annual turnover of around £8 million; and attract over 3 million visitors and regular users every year - around 50,000 of these visitors are school pupils⁴⁵.

Food security

- The UK’s potential self-sufficiency in food is considerably higher than in the 1950s. British farmers can produce 64% of the food we eat, or 77% of indigenous food⁴⁶. For comparison, the figures for 1956 were 47% and 61%⁴⁷ respectively. However, potential self-sufficiency has declined since its peak in the late 1980s. Further, although we may be capable of a large degree of self-sufficiency, this does not mean that we eat all that we grow: both imports and exports, measured in tonnes, have roughly tripled in the last 20 years.
- In Britain we have lost 97% of our fruit and vegetable varieties since 1900. Globally, 75% of the genetic diversity of crop plants was lost in the last century⁴⁸.
- The food industry is vulnerable to public health/food safety issues, highlighting the need for traceability and food labelling. For example, the overall cost of Foot and Mouth Disease to the food and farming sectors in the UK is estimated at £3bn⁴⁹.
- 30,000 people in London rent allotments to grow vegetables and fruit, and 14% of households grow vegetables in their garden⁵⁰. There is a shortage of allotments in all the Inner London Boroughs⁵¹, and concern about the impact of contaminated land on attempts to increase local growing schemes⁵².

STAGE 2: PROCESSING & MANUFACTURING

Health

- By and large, standards of food processing in the UK are high, and have been improving in recent years.
- Some types of processing have undesirable impacts upon health, however. For example, phosphoric acid in fizzy drinks is linked with osteoporosis, tartazine food colouring with hyperactivity, and aspartame sweetener with headaches, mood swings and nausea. Certain types of processing also add high levels of salt and/or sugar to products. (It is noteworthy that the Department of Health and Department for Education & Skills recently announced new minimum health specifications for processed foods in schools from September 2005).

Environmental

- The Food and Drink sector is the UK's fourth highest energy user after iron & steel, engineering and chemicals. Most manufacturing sub-sectors have negotiated Climate Change Agreements (CCAs) with the Government to reduce energy use⁵³.

Economic

- Food and drink manufacture in the UK contributes 2.5% of national GDP and employs 534,000 people⁵⁴. It is the third largest manufacturing sector behind engineering and chemicals. In London, it provides approximately 31,000 jobs – almost half of which are in West London - representing 0.7% of London's employment.
- While 40,000 jobs nationally have been lost in this sector in the last two decades, from 1995 onwards there has been an increase in the number of jobs in London⁵⁵.
- Gross weekly pay for those in the Food Preparation Trades in London is £308.01/week. The overall average wage in London across all sectors is £637/week⁵⁶.
- The Labour Force Survey 2002 shows that in the food and drink manufacturing sector nationally 32% of the sector's employees are female; 8% are from ethnic minorities; 14% are disabled people; and 31% are over 45 years of age
- The sector covers a range of different sized companies – in the UK 83% of food businesses employ 9 staff or fewer, while just 320 large companies (with more than 250 employees) account for 76% of employment. In London, over 80% of food manufacturing businesses employ fewer than 20 people. Large food & drink manufacturers in Greater London include Allied Bakeries, Coca Cola and Tate & Lyle.
- In 1999 there were approximately 3,500 speciality food producers in the UK, employing 60,000 people and with sales of approximately £3.6bn. Within London, there are approximately 360 such businesses, producing a range of speciality foods including bread, cake, chocolates, honey, salad dressings, sausages, etc.⁵⁷ Small food processors face challenges in terms of marketing costs, ensuring high volume production for supermarkets and the costs associated with health & safety auditing and approval.
- The UK food and drink sector work-force has a relatively low level of skills. Research suggests that the number of employees with educational qualifications is 30% lower than the EU average and 40% less than Japan; while the number of employees with vocational qualifications is 20-30% lower than the EU and Japan. UK companies tend to be more likely to manufacture low value added products; have higher levels of product proliferation (and hence lower levels of automation), and lack marketing skills⁵⁸.
- Many of London's food and drink manufacturers are Black and Minority Ethnic (BME) businesses. Research suggests that many are optimistic about their prospects⁵⁹ (relative to BME companies in other sectors - see "Retailing").
- Skills shortages are a problem for some businesses and, as such, there is a demand for migrant labour.

STAGE 2: PROCESSING & MANUFACTURING (cont'd)

- There is a need to adapt to changing consumer preferences, for example for healthier products, ethnic foods, and convenience meals.
- There are concerns about the threat of litigation to food manufacturers whose product portfolios contain a high proportion of “unhealthy” foods⁶⁰.
- Food processing is the fastest growing manufacturing sub-sector in London – growing by 9% in employment terms between 1998 and 2001⁶¹.

STAGE 3: TRANSPORT, STORAGE & DISTRIBUTION

Health

- Some studies show that specialisation and standardisation, coupled with long distance transport, are having a detrimental impact on the nutritional value of our food. Some nutrient losses, in particular vitamin C, A and E, will occur even with excellent storage conditions⁶².
- The distribution of food – whether by road, air, shipping or rail - generates air pollution which has a number of implications for health. For example, there are concerns about the emissions of PM₁₀ and NO_x (a precursor of ozone) from road freight. Ozone is linked to the incidence and severity of asthma⁶³. Nationally, it is estimated that around 24,000 deaths may be hastened each year in the UK by periods of high pollution, and a further 24,000 hospital admissions triggered⁶⁴. In London, there are 1,600 premature deaths each year alongside a further 1,500 hospital admissions.
- The London Lorry Ban was introduced in 1985 and places restrictions on the use of HGVs on certain roads and at nights and weekends. The ban is to be reviewed as part of the Mayor's Transport Strategy (Policy 4K.3).
- Goods vehicles still account for the majority of the worst polluting vehicles in London. However, progress has been made and a growing number of commercial and municipal fleets operating in London have adopted the latest emissions reducing technology or, in some cases, alternative fuels. The shift to the latest Euro 111 standards from the pre-Euro I emission standard lorries can lead to reductions of both NO_x (by two thirds) and PM₁₀ (by three quarters). These technologies can also reduce the level of engine noise.

Environmental

- Food is travelling much further – between 1978-1999 “Food Miles” increased by 50% and now some 40% of all freight is related to food⁶⁵. 29% of the vegetables and 89% of the fruit we eat, for example, are imported⁶⁶. However, most trade is still within EU borders, accounting for 58% of our imports and 77% of our exports⁶⁷.
- Food road haulage within the UK accounts for 2.5% of the UK's total CO₂ emissions⁶⁸. Although relatively small alongside the emissions from agriculture (7.5-12%) this is one of the few components of the food system where CO₂ emissions are projected to increase. Furthermore, this figure does not include the unquantified emissions which are generated during the course of transporting foods from overseas. Indeed, emissions resulting from international air and sea freight are not included in national inventories or the Kyoto Protocol.

Economic

- The UK has a highly consolidated distribution network which has been referred to as the most efficient in the world⁶⁹.
- A strong argument for consolidated distribution is the improved efficiency and reduced congestion/fuel consumption. However, most existing approaches work against small and local producers, favouring larger businesses and longer supply chains.
- Traffic congestion and parking are highlighted as problems for those trying to transport, buy and/or sell food in London. In this respect the evidence suggests the Congestion Charge has had a beneficial impact: research suggests that 67% of those companies surveyed have seen improvements in business travel since the charge became operational⁷⁰.
- The rise in the supermarkets' market share and their efficient distribution systems has led to a reduction in wholesale markets in favour of direct sourcing from suppliers.
- In terms of economic and energy efficiency, the level of empty vehicle running in the food supply chain tends to be lower than in the freight industry as a whole – 22.7% for foodstuffs compared to 26.4% for the average across all sectors⁷¹. Moreover, when they are carrying loads the vehicles tend to be filled to around 70% of their deck area⁷². However, on approximately a third of loaded journeys and fifth of the total distance travelled (including the return journey) vehicles are less than half full when measured either by volume or weight.

STAGE 3: TRANSPORT, STORAGE & DISTRIBUTION (cont'd)

- Warehousing and storage trends point in the direction of bigger and fewer distribution centres as the supermarkets attempt to reduce costs. These are served by a network of local consolidation centres which initially consolidate the goods before they make their way to regional or national distribution centres. This makes economic sense in terms of the balance of transport costs versus land costs and difficulties securing planning permission⁷³. In London, a review of the capital's five wholesale markets is underway, with a view to consolidating into three markets.
- A major logistical development has been the emphasis on more frequent, timely and reliable deliveries which seek to minimise stock at all stages of the supply chain – often referred to as “Just in Time” (JiT) deliveries. The pressure for this shift has come from the supermarkets, and in the years 1996-2002 the top four supermarkets reduced their average stockholding of fast moving grocery products from 10.6 days to 9.6 days⁷⁴. There is a debate as to the efficiency of this system and concerns that it has led to smaller deliveries in less efficient vehicles. However, this is contested territory – research has found no evidence that at aggregate level JiT is reducing vehicle loading⁷⁵.
- Between 1968 and 1998 international food trade increased faster (by 184%) than world population (91%) and world food production (84%)⁷⁶.
- There appears some correlation between shorter supply chains and lower overall lifecycle CO₂ emissions⁷⁷. However, proximity is not always a good measure of carbon sustainability, for three main factors: the mode of transport (road, rail, sea or air); the efficiency of the supply chain network; and wider life cycle considerations in the food chain. It is, for example, less CO₂ intensive to import certain crops than grow them locally where that would require greenhouses with intensive inputs of energy, water and chemicals.
- Some forms of freight transport have greater environmental impacts than others. Shipping is one of the best options, since road transport generates six times more CO₂ and airfreight 50 times more⁷⁸.
- The majority of food entering and leaving the UK will travel by ship – 94% (by weight) of the food we import from non-EU countries and 89% of our exports (the corresponding figures are lower if measured in terms of value)⁷⁹. Food air freight is much smaller when measured by weight – 0.7% of EU food imports and 1.6% of imports from non-EU countries.
- In spite of the predominance of sea freight, it is the road and air freight sectors which are growing. In the last ten years the amount of food transported on UK roads has increased by around 22% and the average distance travelled by 26%⁸⁰. Between 1989 and 1999 there was a 90% increase in road freight movements of agricultural and food products between the UK and Europe⁸¹. In London, 118 million tonnes of road freight (of all types) has either its origin or destination in London, and accounts for 14% of all vehicle kilometres on major roads. In the absence of intervention, total goods vehicle traffic in London is projected to rise by over 10%.
- Food is also the largest air-freighted sector (accounting for 13% by weight) and in the last three years total imports of foodstuffs by air have grown by 47% (by value). Globally, around 50% of air-freighted goods are carried in the belly of passenger planes that would be flying anyway, although the growth in the use of dedicated freighters (12.1% per annum) has been significantly higher than the growth in aircraft belly hold (7.9% per annum)⁸².
- The aviation industry in general is expected to contribute as much as 15% of global CO₂ emissions by 2050 (though largely as a result of the growth in passenger flights). Furthermore, these estimates do not take into consideration concerns that CO₂ emissions from aviation at high altitude could have a greater climate forcing impact (through the production of vapour trails and additional cirrus cloud which themselves have a warming effect).
- Road and air freight may not be energy efficient but, at present, are cost efficient. It is argued that this is primarily a result of the failure to reflect the full range of environmental and social externalities within current transport prices. There is currently no tax on aviation fuel, and air freight prices are falling at 3-4% per annum⁸³.

STAGE 3: TRANSPORT, STORAGE & DISTRIBUTION (cont'd)

- In spite of organic food's environmental benefits at the point of production, over half of that consumed in the UK is currently imported (although this is declining as UK production capacity increases – see "Growing"). Sustain found that one basket of imported organic produce could release as much CO₂ as an average four bedroom household does through cooking meals for eight months⁸⁴. The same would, of course, hold true for an identical basket of non-organic produce (and without the environmental benefits offered by organic production).

STAGE 4: FOOD RETAIL

Environmental

- Supermarkets account for 5% of total UK Greenhouse gas emissions⁸⁵.

Economic

- Around 25% of all London businesses sell food⁸⁶. Many are small businesses employing less than 10 staff.
- Nationally, non-specialised food stores (i.e. supermarkets) employ 1,027,000 whilst specialised (i.e. small) stores employ 142,000 for the sale of food and a further 63,000 for the sale of beverages and tobacco products⁸⁷.
- Nationally, food drink & tobacco manufacture employs 432,000 people; of whom two thirds are male and one third female. One in every twenty five men, and one in every four women works part-time⁸⁸.
- In the food, drink and tobacco *retail* sector nationally, within the total employment of 1.2 million, 36 per cent of employment is accounted for by men (of whom 46% work part-time) and 64% by women (of whom three-quarters work part-time).
- In the restaurant and catering sector, women account for 58% of the 836,000 jobs nationally; and part-time rates are 67% for women and 35% for men.
- There is a wide range of sellers in the London food market, including non-specialised food stores (i.e. supermarkets, convenience stores, independent retailers, etc.), specialist food stores (i.e. butchers, delicatessens, etc.), restaurants, caterers, and markets.
- The largest four **supermarkets** currently control 75% of the market in the UK⁸⁹. The level of concentration in grocery retailing in London is higher than for the UK as a whole – 70% of one-stop shopping in London is accounted for by Sainsbury's and Tesco, compared to 55% for the largest two supermarkets across the country as a whole⁹⁰. The supermarkets are now expanding into the convenience market through 'local', 'metro' or 'city' stores.
- Analysis by the Competition Commission (CC) suggests that many of the conditions necessary for firms to engage in anti-competitive behaviour exist in the UK with respect to grocery retailing, although no supermarket retailer has been found guilty of such behaviour. To address potential adverse impacts it was recommended that a code of practice be introduced to govern supermarket-supplier relationships.
- Research by Imperial College⁹¹ suggests that there is considerable heterogeneity in the nature of relationships between suppliers and supermarkets, with evidence of good practice in some relationships but considerable room for improvement in others. The Office of Fair Trading has also recently released research suggesting that Supermarkets are, by and large, complying with the Code⁹². The research found little evidence of breaches, although there have been some in relation to supermarket requests that suppliers make lump sum payments for loyalty and continued supply.
- The major retailers are exploring the potential to expand the quantity of local and regional produce they sell. However, there is currently a tendency for supermarket stocked 'local' foods to be those which have a distinct and unique quality (tending towards the speciality market), rather than commodity goods⁹³. The supermarkets also already account for around three quarters of organic sales in the UK.
- There are 12,155 **restaurants** in London (half the nation's total⁹⁴) 6,155 cafes and 5,245 pubs/bars⁹⁵. Furthermore, around 300 hotels have full restaurant facilities⁹⁶. London boasts 31 Michelin-starred restaurants, more than any other city with the exception of Paris.
- Many areas of London are particularly associated with local ethnic cuisines, such as Brixton, Brick Lane, Haringey, Southall and China Town.

STAGE 4: FOOD RETAIL (cont'd)

- It has been estimated that, on average, 120 new restaurants open each year in London and approximately half that number close⁹⁷.
- Many respondents in a recent survey of those caterers thought receptive to local food found that local sources are hard to find and the effort involved often put them off⁹⁸. There is also a lack of awareness of assurance schemes (e.g. the “little red tractor” or RSPCA’s ‘Freedom Foods’), confusion and criticism of the lack of stringency.
- The economically valuable catering sector, while serving as a useful employer for transient workers such as students and newly-arrived immigrants, remains volatile and poorly paid. According to the Office of National Statistics, of the 10 sectors with the lowest wages nationally, 7 are from the food sector (including restaurants, agriculture and retail)⁹⁹
- The **contract catering** sector is growing. The Institute of Directors lists 4,005 contract caterers in the UK, with 5 large companies controlling 85% of the market share. The total number of meals served by contract caterers in the UK grew by 3% in 2002, and annual turnover rose by 5.1% to £3.7bn¹⁰⁰.
- According to Sodexo (with a market share of 22%), 90% of business and industry catering is now contracted out, compared to 50% of private schools and 40% of government departments. The sector is suffering from a skills shortage in the face of its rapid growth.
- **Speciality food shops** account for a small share of the UK food and grocery sector (8.7%) having largely lost out to the major supermarkets¹⁰¹. This is speculated to be higher in London, however, due to its diverse and wealthy population, and high levels of tourism.
- **Food markets** continue to play a significant role in London.
- There are currently five wholesale food markets in London (Billingsgate, New Covent Garden, Smithfield, Spitalfields and Western International). They are changing their role as middle points between farmers and retailers and are increasingly used for selling produce to caterers (which now accounts for 14-42% of their trade). The London wholesale markets together have a combined turnover of approximately £1.6bn, and represent 20% of the total supply of fresh meat, fish, fruit and vegetable supplies to London and the South East. A review of wholesale markets in London, testing the scope to reduce the number to three, is currently underway.
- A recent review by the House of Commons Agricultural Select Committee concluded that London’s wholesale markets are a convenient and important source of supply for a growing number of SMEs, especially small catering establishments, the remaining independent retailers and street markets (and in particular ethnic traders).
- London already has a number of successful large scale markets (e.g. Borough).
- There are 70 street markets in London accredited to the National Market Traders’ Federation. Recent research by NEF for the LDA found that street markets have a particularly strong role in addressing food access for low income groups¹⁰². Price comparison analysis suggests prices are considerably lower than those of supermarkets and custom is drawn from the local area. The research also found that support for street markets appears to vary across London boroughs.
- There are also around 27 Farmers’ Markets, operating or planned, in Greater London. They are located at a range of locations (school playgrounds, town centres, church car parks) and are run by four organisations with different rules and varying levels of control. The National Association of Farmers’ Markets accreditation state that producers selling must come within 30 miles of the market, but in London this is extended to 100 miles. In total the farmers’ markets in London generate spending of up to £3.9 million¹⁰³.

STAGE 4: FOOD RETAIL (cont'd)

- 95% of **independent food retailers** in London are of Asian origin¹⁰⁴, and many are pessimistic about their future prospects¹⁰⁵. Food businesses owned and managed by minority ethnic groups face a number of challenges common to other small businesses in London but also additional barriers (including: less capital to draw upon initially to start or purchase a concern; a lack of training programmes in London for chefs specialising in most ethnic cuisines; poor networks with regard customers, suppliers and investors, thereby restricting their growth; and poorly developed supply chains).
- Centralised networks are resulting in a decline in independent retailers¹⁰⁶. The New Economics Foundation claimed that 30,000 grocers, banks, pubs and post offices closed between 1995 and 2000¹⁰⁷. Local food stores are not just under pressure from competing food retailers, but also from the "Clerkenwell effect" – bars, restaurants and nightclubs moving into the area and pushing up the price of property.
- The **online grocery market** is growing in the UK, although there is great variation in estimates of its current size: Verdict quotes £1.2bn while Keynote estimate £465m. Keynote also says that 90% of the market is accounted for by the large multiples (and Tesco.com alone handles around 120,000 orders each week) with smaller niche suppliers accounting for around 10% (or £50m). According to Verdict the UK has approximately 5.9 million on-line shoppers, growing to a predicted 8.5 million over the next five years. Higher income groups and people in full-time employment are most likely to be active in the market¹⁰⁸.
- There are now over 200 **produce box schemes** in the UK, with many either operating in, or delivering to, London. Combined with sales from farm shops, this market is estimated to be worth £108m a year. Although still very much a niche market, it recorded strong growth of around 16% in 2003-4¹⁰⁹.

Social & Cultural

- Safeway was the first major multiple to offer a range of Halal meals in selected stores, and others are now following suit.

STAGE 5: PURCHASING FOOD

Environmental

- The growth in the organic food market (noted above) has a range of environmental benefits (e.g. reduced pesticide run-off, enhanced biodiversity).
- Travelling to shops for food causes air pollution and accounts for 1% of total UK greenhouse gas emissions¹¹⁰. While there is less pollution per vehicle than goods transportation, this is balanced by the number of car trips. Of the average 893 miles an individual travels for shopping, over a third (349 miles) are for food. The majority (60%) of these trips are by car. Food shopping accounts for 5% of all car mileage (an increase from 2% in 1996/98)¹¹¹. London has markedly different travel patterns to the country as a whole and this may have different effects on greenhouse gas emissions.
- The external cost of UK agriculture up to the farm gate is estimated to be £1.5bn/yr.
- It is calculated that a switch to organic production could lead to avoided costs of £1.13bn/yr

Economic:

- The market in London is vast, with 7.4 million residents and a large extended commuter population.
- Spending on retail is the largest component of expenditure in London (accounting for just under one third of all consumer spending) and spending on food and non-alcoholic drink is the biggest expenditure item within this category (accounting for almost 30% of residents' retail spend¹¹²). In 2002 Londoners spent around £8.8 billion in food retail outlets¹¹³.
- As incomes have risen, the proportion of family spending on food has steadily declined and now stands at around 10%¹¹⁴. This masks wide variations between high and low income groups (where food accounts for 6% and 26% of spending respectively).
- Furthermore, in real terms food has become cheaper. Between 1975 and 2000 the price of food fell (in *real terms*) by 31% when compared with the All Items Retail Price Index (RPI)¹¹⁵. Since 1995 food prices have risen by only 10%, whilst prices of all items have risen by 22%¹¹⁶. The price of food in London is, however, about 3% higher than the UK as a whole¹¹⁷.
- A study for the Competition Commission found that 70% of consumers carry out their main grocery shopping once a week. It found that 80% per cent of consumers nearly always, or usually, use the same supermarket for grocery shopping and that 80% of their grocery shopping expenditure was on their main shop¹¹⁸. Nevertheless, as many as 79% still use other shops to 'top up' their weekly shop¹¹⁹.
- Convenience and price almost exclusively drive use of supermarkets; convenience and quality drive use of local greengrocers; quality and 'just passing' influence use of farmers markets; and quality and trust are the main reasons for shopping at a local butcher¹²⁰.

Social & Cultural:

- The British consumer now has an unprecedented level of choice – over 40,000 different products sourced from all over the world¹²¹. In London there is a range of different culinary choices - ethnic meals, for example, constitute 17% of sales¹²², and London offers at least 60 different cuisines from around the world¹²³.
- However, concerns have been raised about inequalities in terms of **food access** to this global choice of products. The concept of a food "desert" – which describes an area with no healthy food within a reasonable walking distance and/or at a reasonable price – encapsulates such concerns.

STAGE 5: PURCHASING FOOD (cont'd)

- Only few attempts have been undertaken to assess or map the significance of 'food deserts'. Among the research that does exist, it is estimated that 4 million people in the UK have difficulty in obtaining a healthy diet¹²⁴. In London, forthcoming research from the GLA (on grocery retailing) and the LDA (on the planning issues associated with food deserts) will throw further light on the problem.
- As noted above, food accounts for a greater proportion of low income households' spending, and furthermore some studies have shown that a healthy diet costs over 50% more than an unhealthy one, with expenditure on fruit and vegetables accounting for most of the difference¹²⁵.
- In London – where some 39% of London households (49% in inner London) have no car, 27% of Londoners fall into the lowest income quintile and 53% of inner London children and 33% of outer London children live below the poverty line¹²⁶ - there are concerns that the issue of food access may be more pronounced. For example, thirteen wards across three London boroughs have been identified as 'food deserts' areas where there is no provision of healthy food¹²⁷. In Newham more than two thirds of residents live more than 500 metres from the nearest shop selling fresh fruit and vegetables.
- In response to this problem, there are social food projects in at least 8 boroughs. Projects operating within the membership of the Newham Food Access Partnership cumulatively turn over £105,000 a year¹²⁸. However, there is an acute problem of long-term viability with many schemes¹²⁹, and their size relative to the overall food market in London is tiny.
- There is conflicting evidence about the potential for food access projects to source locally from farmers. Some food access projects close to London's green belt appear to have set up mutually beneficial support arrangements with local growers, but projects in Inner London have found locally grown produce to be too expensive for local residents.
- A growing recognition of the purchasing power of the public sector has led to a greater focus on **public procurement**. For example, the NHS provides over 300 million meals a year at a cost of £500 million¹³⁰ (including 250,000 litres of orange juice, 12.3 million loaves of bread, 62 million litres of milk and 1.3 million chicken legs). The NHS is also the largest employer in the country. Currently, hospitals have a budget of around £2.75 per person per day to supply three meals and eight beverages¹³¹.
- Recent developments include government guidance from Defra, ODPM guidance for local authorities, and a number of pilot schemes. In London, a two year project run by London Food Link is underway which aims to increase local and/or organic food supply into four NHS hospitals to 10% of their routine catering provision¹³².
- Consumer demand for **alternatively-sourced foods**, or foods with an ethical/environmental dimension, is growing (and indeed the UK is among the biggest markets for such products across Europe). Fairtrade products hold a UK market share of 2.4%¹³³. The figure for organic food is 1.5% and sales exceeded £1bn for the first time in 2004. More significant progress on "single products" has been achieved – fair-trade ground coffee now commands 14% of the UK ground coffee market, and free range eggs account for 40 per cent of total retail egg sales.
- The Food Standards Agency annual Consumer Attitudes to Food survey has revealed that more and more people are looking for ethical information on food labels, such as methods of production, from 14% in 2003 to 19% in 2004¹³⁴.
- Mintel are forecasting continued growth in the organic sector – albeit at a slower rate of 9% per year up to 2007¹³⁵. However, the markets remain small and niche (and even at the current rates of growth are set to remain so for the foreseeable future).

STAGE 5: PURCHASING FOOD (cont'd)

- There is also a significant gap between the number of consumers who *say* environmental and ethical issues are important, and the number who *actually purchase* such products. For example, 59% of consumers say there are either 'fairly' or 'very' interested in buying 'local' food (IGD). However, support is passive, and the top three influences of consumer choice remains price, convenience and time¹³⁶. Ethical, environmental and social factors are lower-order considerations (by some margin).
- There also appears an important distinction between *significance* and *salience*. That is, while these issues are important to people, they are not sufficiently 'top of mind' in day-to-day life to bring about behaviour change. For example, a survey by the FSA found that, when prompted, 88% of people rated the conditions in which animals are raised as being very/quite important to them. However, having previously been asked the most important factors that influence their choice, only 10% mentioned production method, while just 1 per cent mentioned explicitly animal welfare. Indeed, market research in Yorkshire & Humber¹³⁷ suggests that only a small minority of around 5% of consumers proactively purchase ethical/environmental products, compared to around 45% who are positive but passive, and around half who are not engaged at all.
- Sales of **vegetarian food** in the UK total £580m per year and have grown significantly over the past decade. Almost one third of vegetarians state health as their primary motivation, alongside personal ethics¹³⁸. The UK market for "**Functional Foods**" (those which have additional health benefits such as yogurt drinks or 'healthy' margarines) grew in value by 10.8% in 2002/3¹³⁹. Almost one in three (29%) consumers say there are interested in foods claiming to "assist heart health and maintain healthy cholesterol".
- **Consumer labelling** is the principal means of providing consumers with point-of-purchase information about products and their purchasing decisions (for example in terms of health information, country of origin, allergy or intolerance-related risks or method of production).
- Certain labelling schemes or marks are increasingly well recognised. For example, recognition of the Fairtrade symbol has increased to 42% of consumers in 2004 (from 12% in 1998)¹⁴⁰. However, research for the NCC suggests that only 31% of consumers 'always' look for labelling information, while a further 26% 'usually' look. Close to one in four (24%) 'rarely' or 'never' refer to labelling¹⁴¹. Furthermore, many are confused by the proliferation of labels. Research by the FSA suggests that only 29% of consumers correctly state the main ingredient from a typical ingredients list, while understanding of the terms "use by", "sell by" and "best before" is poor among around a half of consumers. Many consumers appear confused by the term "local food" and often understand it to be synonymous with "British"¹⁴².
- Others are cynical about the trustworthiness of the information and the ability to audit and enforce guidelines. A survey in Yorkshire & Humber found that only 16% have "a great deal" of trust in labelling schemes¹⁴³.
- The average time spent shopping per day (for all types) is 31 minutes, with a difference between men (24 minutes) and women (38 minutes)¹⁴⁴.
- Research by the FSA suggests that Black and Minority Ethnic communities are particularly predisposed to using local markets (31% compared to 19% of the UK population in general)¹⁴⁵. This work is consistent with research by the National Consumer Council in Hackney¹⁴⁶.
- There is a growing "food tourism" market; national research¹⁴⁷ suggests that 6-8% of people are "food tourists", who seek destinations on the basis of the quality of food and drink in the vicinity of the area. A further 30-33% are "Interested Purchasers" who feel that food & drink can make a positive contribution to the quality of their holiday. The remainder of people fall into the "un-reached" (15-17%), "un-engaged" (22-24%) and "laggards" (17-28%) categories.

STAGE 6: PREPARATION, STORAGE & COOKING

Environmental

- Food related activity in the home accounts for 2.6% of UK CO2 emissions. Although not as large as agriculture (7.5-12%) or supermarkets (5%), it is roughly equivalent to UK road haulage and also shows mixed trends as to whether it will increase or decrease in the future. For example, the increasing size of appliances may increase emissions, while reductions in cooking may depress them. Research suggests further and significant improvements in the energy efficiency of food-related appliances are possible (in the range of 50-75%)¹⁴⁸. Food cooking also leads to air pollution, especially for gas ovens and hobs and in terms of local exposure to pollution, especially in cooking spaces with poor ventilation.
- Research by IGD demonstrates that consumers who cook from scratch tend to be more interested in food, and place the greatest importance on food preparation and meals¹⁴⁹. Similarly, research by the Food Standards Agency finds that factors behind more interest in sustainable food & farming include the enjoyment people get from cooking, the time they spend cooking, and whether they use fresh/raw ingredients.
- The environmental impact of the trend toward convenience foods depends on a variety of factors. Several lifecycle analyses have compared freshly made and convenience meals, with ambiguous results. One study found roughly comparable impacts so long as one person was eating the meal. If the meal is to feed more than one, the home made meal requires less energy. The balance moves further in favour of home meals if cooked using natural gas instead of electricity.

Social & Cultural

- The way in which we prepare, cook and eat food has changed rapidly in the past twenty years, with a decline in cooking from scratch and family meals, and an expansion in 'single eating' and ready meals, as well as a greater choice in terms of where and how to eat.
- In terms **food preparation**, the average time taken to prepare the main evening meal fell from 90 minutes in the 1980s to just 20 minutes now. The Time Use Survey 2000 shows that the time dedicated to food preparation across the whole day is 42 minutes per person, with a significant variation between men (26 minutes) and women (57 minutes). 97% of UK households now own a microwave and 25% a dishwasher¹⁵⁰.
- People who are proficient in **cooking from scratch** are now beginning to represent a declining proportion within the population¹⁵¹. Indeed, the inclination to prepare a meal from scratch is waning¹⁵², and the proportion of people agreeing with the statement "I love/really enjoy cooking" fell from 46% in 1989 to 41% in 1999¹⁵³.
- Knowledge appears to be a significant barrier. One survey revealed that nearly 90% of British people do not know that beer is made from barley, 20% do not know that yoghurt is made from milk and a tenth think that rice is grown in the UK¹⁵⁴. Young people's knowledge of how their food is produced seems particularly limited. Some research shows, for example, that only 54% of British children aged 7-15 know how to boil an egg¹⁵⁵, and that 44% of 18-24 year olds think that shop-bought pizza and a salad is "home cooking"¹⁵⁶.
- Research suggests that the amount of time spent cooking is determined not just by skills and inclination but also structural factors such as shrinking family size, longer working hours, increasing female participation in the workforce and longer shopping travel times¹⁵⁷. For example, those in employment spend 40% less time cooking than those who are not in work.
- The UK has **long working hours culture**. For example, a higher proportion of employees work 45 hours and over per week than the EU average¹⁵⁸. A study by the University of Durham¹⁵⁹ finds that the top 10 areas in Britain with the highest percentages of men working long hours include five London Boroughs. Kensington & Chelsea, the City of London and Westminster make up the top three, closely followed by Hammersmith & Fulham and Richmond. On average, one in four London men work more than 48 hours a week. However, at a national level, recent data shows that the number of people usually working more than 45 hours per week is declining¹⁶⁰. Research by Working Families finds that long hours at work leads to people drinking more alcohol and eating unhealthy food¹⁶¹.

STAGE 6: PREPARATION, STORAGE & COOKING (cont'd)

- In Ofcom's qualitative research many mothers talked of having no time to do 'proper cooking' and there was a feeling that real cooking is hard work. An abundance of processed products which don't need forward planning and require little if any preparation time, make it easy to produce food for children quickly and conveniently. The lack of preparation is also important to older children who are likely to be preparing their own snacks. Indeed, there is a growing "grazing/snacking" culture amongst children, which favours the consumption of high fat, salt and sugar foods.
- Nevertheless, there still appears a strong interest in food - in 2002 British TV screened 4,000 hours of food programmes, and 900 food books and 25 million words about food and cookery were published¹⁶². Furthermore, Reuters EU-wide 'Home Cooking' study cites home working and young people living with their parents for longer as potential drivers for home cooking in the future.
- As home cooking from scratch has declined and time become more limited, there has been a large increase in **ready meals**. The Meat and Livestock Commission publication, *Meat Demand Trends*, claims that about 30% of adults in the UK eat at least one ready meal per week. The demand for ready-meals in Britain grew by 44% between 1990 and 2002, while growth across Europe as a whole was 29% - Britain is now consuming double the amount of ready-meals consumed in France and six times the number in Spain.
- The chilled ready meal sector in the UK is now twice the size of the frozen ready meal market, and chilled ready meal sales totaled £1.4bn in 2003. London has the lowest overall level of penetration by region, although as many as 67% of people still buy them. Consumption of ready meals is highest among young people. The upgrading of ready meals in terms of premium brands has been shifting the composition of consumption of ready meals by social grade.
- Growth in ready meals is forecast to continue, albeit as a declining rate. Growth is expected to be particularly driven by the continued introduction of premium range products and the chilled food sector - *"The market is heading towards ever greater convenience, and increasingly the purchase decision-maker in the typical UK household is a time-strapped professional"*¹⁶³.
- Other venues for eating also compete with home cooking. For example, the **home delivery market** is estimated to be worth £1.2bn, mainly for pizza, Chinese and Indian meals. There has also been notable growth in "**food-to-go**" market - *"The food-to-go sector is booming in the UK market as meal preparation times hit the floor"*¹⁶⁴.
- London spending on **eating out** is higher than the rest of the country¹⁶⁵ - it generates £1.6 billion through consumer spending¹⁶⁶. Indeed, London accounts for around 18% of all food and drink consumed outside the home within the UK. There is a particularly high demand for 'ethnic meals'. In total, eating out accounts for 38.4% of spend on food in London (compared with 28.2% in the South West, for example)¹⁶⁷.
- **Fast food restaurants** have also proved very popular with consumers. However, the fast food (non take-away) share of the restaurant meal market has been falling steadily since 1999 (its share decreased by 3.3% 2000-2003), and total expenditure on fast foods fell for the first time from 2002-3 by £100m¹⁶⁸.
- While food preparation in the home on a regular basis may have declined, recent research suggests that **home cooking for entertainment/socialising** is growing. A survey for the Prudential finds that the average British Household now hosts around 14 dinner events for friends, equating to £39.5bn a year.
- There are clearly distinct differences in food choices across London's **diverse communities**. Nevertheless, research suggests that different ethnic groups are sharing in the shifts in lifestyle trends. Their busy lives reduce meal preparation times and combined with younger generations as a whole possessing fewer cooking skills than the older generation, families are tending to eat more processed foods; snacking during the day; and buy 'ready-meals' or 'take-aways' to eat at home.

STAGE 7: EATING & CONSUMPTION

- In 2000 6.9 million tonnes of food was consumed in London.

Health

- Diet has a crucial role in the promotion of health. Research suggests that an increase in fruit and vegetable consumption could in fact reduce the incidence of cancer by at least 20%, while around 30% of coronary heart disease is diet-linked¹⁶⁹. In London Coronary Heart Disease (CHD) is the leading cause of death accounting for 41% of premature deaths in London in 1996, followed by cancers at 24%. The range of death rates from CHD in people under 65 varies from 25 per 100,000 in Richmond to 66.6 per 100,000 in Tower Hamlets¹⁷⁰.
- There is also evidence that diet is a factor in a wide range of other health conditions, including some mental ill-health conditions, attention deficit disorders¹⁷¹, Type 2 Diabetes and oral health. A Young Voice study of 1,000 young Londoners found that concerns about eating badly, not exercising, depression and body size featured strongly.
- There have been **significant improvements in diet and nutrition** over the last 50 years.
 - The percentage of energy derived from fat has declined and now stands at 38.2% (compared to a recommended level of 35%)¹⁷², and it is lowest in London (which also has the lowest proportion of total energy derived from saturated fatty acids)¹⁷³.
 - Consumption of fresh fruit has increased by 55% since 1975, and in 2003 recorded an annual increase of 4.3%¹⁷⁴. Furthermore, consumption is higher in London (1,376 grams per person per week) than the average for England (1,242 grams pppw).
 - In contrast, consumption of fresh vegetables has changed little since 1975, although there has been a decline in the consumption of green vegetables and potatoes¹⁷⁵. In London, consumption is in line with the average and stands at 1,139 grams pppw.
 - In 2002, children and young people in London had the highest fruit consumption of any English Region (mean 3.1 daily portions aged 5-15 and 16-24) but this still falls short of the recommended five daily portions¹⁷⁶.
 - This polarisation between fruit and vegetable consumption is forecast to continue 2004-2008¹⁷⁷. This is probably due to the trend towards convenience eating as fruit usually needs little/no preparation whilst vegetables do.
 - Londoners drink less than the GB average¹⁷⁸. 23% of men in London drank 22 or more units of alcohol per week in 2001/02, compared with 27% in Great Britain as a whole. 12% of women drank 15 or more units a week compared with 15% in Great Britain.
- In spite of these improvements, there are marked **socio-economic differences** in diet. For example, households in the highest income decile consume 2.5 times more fruit and vegetables than those in the lowest income decile. The high fruit and vegetable consumption of some ethnic groups in London (e.g. Chinese men and women) hides the very poor diet of other groups, such as the Bangladeshi and Irish communities.
- Furthermore, **obesity** is becoming more of a problem - 23.5% of women and 21% of men in the UK are now classified as obese (compared to 8% and 8% respectively in 1980)¹⁷⁹. In London this is slightly lower (23% of women and 18% of men), but overall this still equates to 20.5% of London adults¹⁸⁰. A further third of London adults (37%) are classified overweight – 43% of men and 31% of women – which is once again slightly lower than the UK average (47% and 33% respectively). Across London the highest levels of obesity are found in South West and North East London. A national survey found that obesity varied significantly across different ethnic groups (lowest in Bangladeshi and Chinese individuals and highest among Irish and Black Caribbean individuals).

STAGE 7: EATING & CONSUMPTION (cont'd)

- The NAO estimate costs of obesity to the NHS to be at least £0.5bn per year and costs to the wider economy to be £2bn a year. In 2003, obesity was implicated in about 4,000 deaths in London, including 600 from heart attacks, 450 from stroke and high blood pressure, and over 300 from cancers.
- There are various public health campaigns around diet, such as “Sid the Slug” campaign (run by the FSA) which urges people to cut down their salt intake; and the 5-A-Day fruit and vegetable campaign.
- Concerns have also been raised, not least through Jamie Oliver’s television series, about the quality of **school meals**. Official government figures for secondary schools suggest that 83% of formal school meals meet existing minimum nutritional standards, although the standards are basic (and are about to be strengthened). There are also concerns about the quality of children’s **packed lunches**. The Food Standards Agency *Lunch Box Survey* (2004) found that 74% of lunch boxes failed to meet the government’s nutritional standards for school meals.
- Government figures suggest 82% of secondary schools lunch meals provide **drinking water** at the beginning of the service, and 91% provide the option of fruit and/or fruit on most days¹⁸¹. However, wider access to water is considered to be a problem. Results from a survey of drinking facilities in primary and secondary schools revealed that 10% of schools failed to provide drinking water at all, while for many others the facility was deemed inadequate¹⁸².
- Behaviour is not always linearly related to attitudes and awareness. The Food Standards Agency, for example, note that while there has been a significant rise in the proportion of people who understand they should eat five portions of fruit a day (51% to 59%), there is currently little change as yet in the proportion actually doing this (27% to 28%).
- Around 80,000 cases of **food poisoning** were recorded in the UK in 2003, down from a high point of just over 100,000 in 1998¹⁸³. However, it is generally accepted by the Food Standards Agency that this underestimates the true number of incidents which go unrecorded. The FSA estimates that food-borne illnesses currently cost the economy around £1.5bn a year¹⁸⁴.
- It is estimated that up to two people in every 100 in the UK have a diagnosed **food allergy**, and an additional one person in 100 has an intolerance to gluten¹⁸⁵.
- The proportion of babies **breastfed** in the UK at birth rose by 3 percentage points between 1995-2000 to 71%¹⁸⁶. However, the proportion falls to 57% after week 1, 43% after 6 weeks and 22% after 6 months. Mothers in lower social class groups are less likely to breastfeed than those from higher social groups (63% as opposed to 83% at birth), while breastfeeding also rises with increasing age of the mother and her age on leaving formal education.

Environmental

- It has already clear that the products that consumers buy – and then consume – can have a significant impact on the environment, whether simply in terms of the specific process of preparation and consumption (cooked Vs ready meal, etc.) and more widely – and importantly - in terms of the influence consumers can exert across the food chain as a whole. The trend towards organic food, for example (see “Retailing”) leads to a pressure on food retailers to supply these products, which in turn puts pressure on producers and manufacturers, and so on. Similarly, consumer demand does not only apply to specific products. Demand for ‘safe’ food (in response to BSE or other food scares) exerts a pressure on manufacturers and producers to improve production methods and ensure traceability and transparency.
- Meat consumption is perhaps one of the most important dimensions of diet from an environmental point of view¹⁸⁷. Several – but not all – forms of meat production are energy intensive. A Swedish study compared four different meals with the same energy and protein contents in terms of their GHG emissions. It found life-cycle emissions ranging from 190g CO2 equivalent for a vegetarian meal with local ingredients to 1800g for a meal containing meat, with most ingredients imported. However, that is not to say vegetarian meals are inherently more sustainable. Indeed, the study finds that vegetarian meals can have higher life cycle CO2 emissions than meals containing meat if the ingredients travel a significant distance and the meat is produced locally.

STAGE 7: EATING & CONSUMPTION (cont'd)

Social & Cultural

- Changes in eating patterns appear to be influenced by **health and/or appearance** concerns. For example, public opinion research suggests that current drivers for eating habits in London include “a desire to lose weight” (35%), “greater awareness of dietary requirements and effects on health” (33%) and “changes in taste and preference” (18%). Concern about animal welfare, the environment and/or Fairtrade is far less significant (7%)¹⁸⁸. 24% of women said they were on diets in 2002, up from 12% in 1987¹⁸⁹.
- Overall, there is a decline on the number of occasions that a **family eats together**¹⁹⁰. With increasingly busy lifestyles, consumers appear to be replacing ‘formal’ cooked family meals with a more irregular pattern of eating, including a tendency to eat out. Families are less likely to eat the same meal but cater to individual tastes instead¹⁹¹. A King’s Fund survey of nearly 400 young Londoners from secondary schools found that 45% of respondents did not have breakfast before school.
- Working patterns have led to a decrease in the average **working lunch break**; this has fallen from 36 minutes in 2000 to 27 minutes now¹⁹². One in four women work through their lunch break, compared to one in six men. UK workers spend, on average, £2.02 on their lunch compared to £1.95 in 2002. In London, the figure is higher at £2.49.
- There has been much interest in the potential benefits of health & diet **on behaviour among offenders**. A recent study¹⁹³ concluded that anti-social behaviour in prisons, including violence, are reduced by vitamins, minerals and essential fatty acids with similar implications for those eating poor diets in the community. Similarly, the impact of diet on the behaviour and concentration of school children is a subject of some interest.

STAGE 8: DISPOSAL

Environmental:

- The food system as a whole generates a significant level of waste. Estimates suggest that it takes 10 tonnes of raw material to produce 1 tonne of processed food. The remaining 90% is discarded as 'waste', including 12 billion plastic bags and 29 million food and drink cans every year in the UK¹⁹⁴.
- As the table below demonstrates, the food system – notably in hotels & catering, wholesale and the food, drink and tobacco industry - makes a significant contribution to **commercial and industrial waste**.

Contribution of Food Industry to Industrial and Commercial Waste			
Type	Percentage of total	Percentage of type	Amount (Mtonnes p.a.)
Industrial waste	69%		48-69
Food, Drink & Tobacco		16%	7.7-11.0
Other industrial		84%	40.6-58.0
Commercial waste	31%		22-31
Hotels & Catering		16%	3.5-5.0
Wholesale (inc. food & drink)		39%	8.5-12.0
Other commercial		45%	9.8-14.0

Source: *United Kingdom Food & Drink Mass Balance*, Biffaward, 2004

- According to Biffa, supermarkets and other retailers throw out about 500,000 tonnes of food a year, of which only a small proportion goes to charities. Supermarkets are reluctant to say how much food is wasted, but it is possible to estimate from information on their websites and in annual reports¹⁹⁵.
- Londoners throw away 3,326,000 tonnes of household waste each year¹⁹⁶. Kitchen and garden waste accounts for around 34% of waste collected from London's households and the general trend has been increasing¹⁹⁷. Second, estimates suggests that packaging makes up about 25% of all household waste and that around 70% of this is food related¹⁹⁸ (thus around 17.5% of all household waste is food-related packaging). Therefore, the total household waste associated with food – organic and packaging combined – is a significant fraction even though household waste accounts for only around 20% of all waste.
- **Packaging waste** is significant at various points in the food system. The UK's current target is to recover 50% of all packaging waste, and much of this responsibility falls to retailers ¹⁹⁹.

Economic

- The **composting of food waste** either centrally or at home has the potential to save money and reduce waste sent to landfill. However, to protect human and animal health the rules of the disposal and use of animal by products have been tightened, specifically in the UK by the Animal By-Products (Amendment) (England) Order 2001. These regulations affect the design or operation of composting collection by waste authorities which have to work within these controls. The Mayor's Municipal Waste Management Strategy sets out a policy for waste authorities to maximise waste composting where reduction and reuse are not possible. This includes encouraging home and community composting, schemes to collect kitchen waste from homes, and working in partnership to separate fruit and vegetable waste from markets for composting. A number of London boroughs are now collecting or piloting the collection of kitchen waste. There are also opportunities to employ **new technologies** which link the treatment of food waste to renewable energy generation (e.g. anaerobic digestion plants).
- Leading industry representatives, restaurant groups and retail outlets are supporting a voluntary code of practice which promotes joint working and community engagement with the aim of reducing **litter** associated with food outlets.

STAGE 8: DISPOSAL (cont'd)

Social & Cultural

- There is also a significant level of **household food wastage**. A variety of studies have suggested, for example, that £424 per UK adult per year is wasted on food²⁰⁰; that one in six people in the UK now discards more than 10% of their weekly groceries because they are past their sell by date or no longer fresh²⁰¹ (particularly “Yubbies” - Young Urban Bin Baggers); and that food loss costs the average US family \$586.76 annually²⁰². Although recycling rates for many packaging materials have increased, wastes from household food consumption are among the least affected by these trends²⁰³.
- While research by Encams²⁰⁴ suggests that the cleanliness of streets is improving, the research finds that certain types of rubbish, especially late-night snack **litter**, are growing. Areas littered by snack packaging rose by 18% in 2003/4, while levels of dumped drink cans and bottles rose by 34%.

5 The Future of Food in London: A Vision for 2016

The previous section set out, in considerable detail, the current state of play in London's food system. The facts and figures highlight where London is doing well, and where there is a need for improvement.

Looking forward, the overall aim is to maintain and enhance areas of strength; tackle and overcome areas of weakness; and thereby to deliver a food system in London that is sustainable, and world class.

Using London's Sustainable Development Framework as a starting point, the vision for a sustainable and world-class food system can be stated as:

"In 2016, London's people, residents, employees and visitors and organisations public, private and voluntary sector - are:

- taking **responsibility** for the health, environmental, economic, social, cultural and security impacts resulting from the food choices that they make, and their role in ensuring that food and farming are an integrated part of modern life
- demonstrating **respect** for all the many elements involved in the provision of their food, and are treating fairly the environment, the people, the animals, the businesses and others involved in providing their food
- conscious of the **resources** being used in growing, processing, distributing, selling, preparing and disposing of their food, and continuously engaged in minimising any negative impacts arising from this resource use
- benefiting from the **results** of this effort, such that all Londoners have ready access to an adequate, safe, nutritious and affordable diet that meets their health, cultural and other needs."

This vision, which incorporates the Mayor's cross-cutting responsibilities of health, sustainable development and equalities, is translated into a series of objectives. The objectives correspond to the five key themes that have run through the Strategy – health, environment, economy, social/cultural and security:

- to improve Londoner's **health** and reduce health inequalities via the food they eat
- to reduce the ecological footprint and **environmental** impacts of London's food sector
- to support a vibrant food **economy**
- to celebrate and promote the diversity of London's food **culture**
- to develop London's food **security**.

The vision and objectives can in turn be expressed more specifically for each of the eight stages of the food chain: this is set out overleaf.

Stage 1: Primary production

London's principal role will be, through its purchasing habits, to contribute to a vibrant and sustainable farming sector in the UK, and beyond.

- Food consumed in London will be produced to the highest possible environmental, nutritional and ethical standards, including the protection of habitats and Green Belt, adaptation to and mitigation of climate change, minimisation of pollution, fair treatment of producers and respecting animal health & welfare.
- More of London's food will be 'local' and diverse – that is, wherever practical, it will come from the surrounding area, neighbouring regions and from elsewhere within the UK and reflect the consumer preferences of London's increasingly diverse population.
- London's farmers will be competitive and achieving strong economic success.

Stage 2: Processing & Manufacturing

London's role will be to specify and expect high standards from processors based outside the capital that are supplying London; and to both expect and support such standards within London itself.

- All food processing enterprises that supply London will operate to the highest environmental standards, and they will provide the highest possible standards of working terms and conditions for their employees.
- The economic viability and diversity of the food and drink processing sector in London will be supported, and the sector will be encouraged in its endeavours to contribute to the wider health of London's local economies.
- The processing of all types of food will be more sustainable – whether fresh food, lunchtime snacks, ready-meals, food-to-go or otherwise – in terms of packaging, energy use and so on. Food and drink processors/manufacturers will operate to the highest nutritional standards, they will incorporate ingredients with a low environmental impact, and they will reflect the full range of London's culinary and cultural diversity.

Stage 3: Transport, Storage & Distribution

London will have a food distribution infrastructure that is economically and environmentally efficient, as well as socially just.

- By 2016 the overall negative environmental impact of the food distribution system will have been reduced.
- Clear measures will be in place to reduce the level of greenhouse gases, air pollution, congestion and noise arising from the transportation of food.
- There will be effective distribution and delivery systems throughout London; and effective and affordable wholesaling and distribution channels will be available to producers/processors of all sizes and ownership structures.
- Clear mechanisms will be in place, in particular strategic arrangements between private and public sector partners, to ensure London's food security (i.e. the availability of sufficient food) in the case of extreme events (such as terrorism, major floods, fuel crises).

Stage 4: Food Retail

Those responsible for selling food in London are the conduit between those that produce food, and those that consume it. They are therefore in a critical position to bring about the 'reconnection' called for by the Curry report, and by 2016 must be playing a transparently positive role in progressing towards a healthier and more sustainable food system for the capital.

- There will be a robust, balanced and "healthy" diversity of food retailing, in terms of both size and type of ownership, and including different forms of delivery (including town centres, High Streets, markets and internet retailing).
- Good employment and operational conditions will prevail throughout the food retail and catering sectors. Employees should be equipped with the skills necessary both to support the prosperity of the enterprises for which they work and to help Londoners make healthy and sustainable food choices. Businesses will operate to the highest environmental standards, with good health and safety records and good terms and working conditions for their employees.
- The economic importance of the food retail sector in London will be recognised and supported; and the potential of retail provision to contribute to economic development, to meet diverse community needs and to play a role in regeneration will be routinely considered.
- Food retailers of all sizes will use their best endeavours continuously to improve the quality of the products they sell, including an increase in the proportion of food sold that is healthy, culturally appropriate, ethical and environmentally beneficial.

Stage 5: Purchasing Food

How and why Londoners buy their food will be the principal means by which London contributes to a healthy and sustainable food and farming system in the UK.

Individuals.

- Healthy eating will not be consistently or dramatically more expensive than alternatives, and no-one in London will struggle to access healthy, affordable and culturally appropriate food.
- The wider social benefits of healthy diets will have been recognised, quantified where possible, and incorporated into the public and private sectors' (and individuals') purchasing decisions, by the use of appropriate subsidies, regulations, regulations and other economic instruments.
- Instances of market failure – where environmental and social costs are not being captured or addressed through the normal operation of the market – will be tackled through specific intervention.
- All Londoners will have sufficient awareness and understanding of food-related issues to make informed choices.

Organisations.

- All public sector organisations will embed sustainability within their procurement strategies and they will explicitly address food issues.
- Sustainable food procurement strategies will be widespread among across the general business community; and, in the restaurant and catering sector, ubiquitous.

Stage 6: Food Preparation, Storage & Cooking

This Strategy categorically cannot, and does not, seek to prescribe or tell Londoners how they should eat. However, because there is persuasive evidence that the decline in cooking skills – both nationally and in London – has, amongst other things, played an important role in disconnecting the public from food, the strategy seeks to provide the opportunity and means for many more Londoners to prepare and cook their own food.

By 2016, therefore, the vision is one in which:

- many more Londoners – men, women and children – will be able to prepare food and/or cook; food preparation and cooking will be a gender-neutral activity; and all Londoners will have the knowledge, confidence and means to store, prepare and/or cook a diverse range of food which is healthy, retains its nutritional value and is safe for consumption
- food preparation and cooking for public consumption – for example in schools, hospitals, residential care homes and prisons – will be conducted to the highest possible standards [in terms of quality, nutrition and environment] and the investment needed to achieve this [in facilities, revenue expenditure, training] should be within mainstream budgets
- Londoners will be more aware of the health and environmental impact of storing, preparing and/or cooking food, and will have the knowledge and access to appliances that will allow them to be able to choose more environmentally friendly means of doing so.

Stage 7: Eating & Consumption

Londoners will have the confidence, awareness and ability to eat healthily, and in ways that contribute to wider environmental and social goals; and, where an individual has caring responsibilities, they will be able to feed their dependent(s) in a healthy and sustainable fashion.

In particular:

- awareness of nutritional and quality issues (including awareness of allergies and intolerance issues) will be extremely high, throughout the capital
- parents will be supported and encouraged to provide healthy nutrition to their children, from the pre-natal stage onwards, and, irrespective of their cultural background, mothers will be helped and encouraged to breast-feed their babies
- food in London, across the diversity of cuisines and cultures, will be promoted and celebrated; Londoners will have ample opportunity to eat in convivial settings, particularly in the company of friends and/or family; and the

opportunity to spend the time they personally need to enjoy food/the eating experience should be widely available.

- children will have access to a range of nutritious, affordable and appealing food & drink; so, too, will those with special dietary needs.

Stage 8: Disposal

London will, by 2016, be taking far greater responsibility for its waste, and given the contribution made by food-related waste. The vision is one in which:

- the amount of food-related materials (organic and packaging) becoming waste will be reduced
- food-related waste will be composted and recycled wherever practicable; where it can't then value should be recovered through new and emerging advanced conversion technologies or waste treatment methods in order to minimise the food waste sent to landfill
- progress will be made on closing the waste "loop" through the use of waste-derived compost
- the problem of food-related litter will have been significantly reduced.

6 Achieving the Vision: Actions & Implementation

6.1 Introduction

The Vision set out in the previous section presents an ambitious, radical agenda for change. In essence, the Vision describes a food system in London in which today's strengths and benefits are secured and enhanced; and in which present weaknesses and costs are tackled and overcome.

Implicit to the Strategy is the assumption that this Vision will not come about unless there is *concerted action*. In the absence of an effective Strategy, the many efforts that are currently underway, and those that will no doubt come in the future, will remain un-coordinated, duplicative or conflicting.

The opportunity to co-ordinate these efforts and to ensure that the whole is greater than the sum of its parts must be grasped. The five overarching objectives for London's food system – to improve Londoner's health and reduce inequalities via the food they eat; to reduce the ecological footprint and environmental impact of London's food sector; to support a vibrant food economy; to celebrate and promote London's food culture; and to develop London's food security – are achievable objectives. However, to ensure **rapid and meaningful progress** towards those objectives, clear actions need to be identified, priorities established, and responsibilities drawn up.

This section of the Strategy addresses this need. It presents an extensive series of actions and, in particular, it sets out **six key priority areas** where co-ordinated action is required, now, if London is to achieve its objectives for a healthy and sustainable food system.

- Ensuring commercial vibrancy.
- Securing consumer engagement.
- Levering the power of procurement.
- Developing regional links.
- Delivering healthy schools.
- Reducing waste.

6.2 The Possible Actions

The range of *possible* actions and interventions is immense. They range from seeking to influence international trade negotiations, through lobbying for fiscal measures at national level, through utilisation of London-wide spatial planning powers, via Borough-level partnerships between retailers and councils, to community-level projects.

The need to prioritise actions and target London's efforts is clear. This strategy has used the following guiding principles to identify those actions that:

- separately, or in concert with other actions, most clearly and closely address the Vision and the five strategic objectives

- contribute to *systematic* improvements across London as a whole rather than at an ad hoc, piecemeal level
- where appropriate, build on existing initiatives and/or political or public momentum
- present genuine scope for London-level action⁷
- ensure a mix of actions with immediate beneficial consequences alongside those with positive impacts that will only become apparent over a longer period of time
- provide a mix of high profile initiatives (with potential “catalytic” impacts), alongside “behind-the-scenes” facilitation aimed at enabling a progressive change in the behaviour of both individuals and organisations
- recognise the way in which actions at one part of the food chain feed forward or backward to other parts of the chain, reflecting the interconnectivity of the system and the fundamental need for *reconnection*.

The selection process (the mechanics of which are presented in detail in Section 6.3) identified an extensive set of actions that, collectively, outline the means of achieving the aspirations of this Strategy and London’s Vision for its food system in 2016 and beyond.

This full set has been presented in Section 6.4, with actions aligned both to the eight stages of the food chain and to those components of the Vision against which they deliver. Following this, Section 6.5 then outlines those actions that are considered so integral to the delivery of this Strategy that concerted and sustained action is required now.

It is important to bear in mind the many possible actions that have been *excluded* from this plan. In some cases, possibilities were excluded on the grounds that they were inappropriate for London; some on the grounds that, whilst superficially appealing, on inspection offered little prospect of genuine impact; some because they were too narrow, or too vague. However, a rolling process of monitoring, review and amendment will ensure that there will be future opportunities for the hard choices of prioritisation to be reconsidered.

It is also important to note that the primary function of this Action Plan is to posit the things that need doing; it does not provide the specific details of when, where and how. These are, of course, vital questions which the implementation process will need to establish in more detail.

It is clear, for example, that some of the actions are targeted at specific areas in London and/or specific groups, while others are applicable at a London-wide level. In other cases a specific action may require a pilot trial prior to any wider roll-out to fully understand and monitor its impact.

There are several strategic developments and opportunities in London that, while not mentioned in specific detail in this Action Plan, nevertheless need to be taken into account when considering the *spatial implementation* of the actions. These include, most notably, the delivery of the Olympic games and the Thames Gateway development.

⁷ For this reason, propositions of the form [for example] “Lobby for changes in EU Competition law to facilitate local sourcing by public authorities” are not included in this action plan.

Clearly, Europe's largest regeneration project in the Gateway offers numerous opportunities for food-related projects. Similarly, London's Olympics success will bring with it an array of food-relevant opportunities, ranging from meeting the dietary requirements of athletes, through highlighting London's world city status in terms of the diverse cuisines available in the city, to the promotion of regional food for spectators at Olympic events.

Therefore, a cross-cutting, strategic and immediate priority for London Food is the **establishment of a working group** with a specific remit to ensure that food issues – and the vision and objectives of this Strategy - are fully incorporated within the Olympic plans and development. This will necessarily involve the development of a specific action, liaison and implementation programme.

As well as outlining the actions themselves, preliminary indications of the stakeholders who should be **responsible** for delivery have been set out in the Action Plan. Given the breadth and complexity of the food system, the number of organisations with a potential role in the action plan is very great. The strategy has already acknowledged the need to engage with the *full range* of relevant stakeholders operating in London, including the public and private sectors, food retailers both large and small, NGOs, and the social, voluntary and community sectors. Note that, since it will have over-arching responsibility for the Action Plan, the GLA itself is not specifically identified as a partner in the tables presented in section 6.4, below.

The range of instruments and methods of intervention open to these organisations is broad. Similarly, the processes of actually engaging organisations, monitoring progress, understanding the relationship between costs and benefits (which may be differentially distributed between organisations) and so forth are also time-consuming and potentially difficult exercises. Full plans for these issues are being developed, as Section 6.6 explains.

6.3 The Prioritisation Process

Method

As already noted, the range of potential actions is vast. To identify those schemes offering the greatest benefit to London, the prioritisation process started with a preliminary screening of all suggestions to remove those considered to be inappropriate or ineffective. The remainder were collated using the Strategy framework, and aligned with the Vision for London.

Each possible action was then ranked according to its "strategic fit", and its feasibility.

The '**strategic fit**' looked at the extent to which each action was deemed to contribute towards achieving each of the five strategic objectives of the strategy. This allowed the prioritisation of some actions which, although primarily aimed at achieving a single part of the vision may at the same time contribute to other strategic objectives – either immediately or in the longer term. It also enabled a comparison of those actions that may go far in achieving a single objective against those that may have a lesser impact but on a wider range of objectives.

The actions were also ranked according to their '**feasibility**'. This looked at how practical the action might actually be to implement. It took into account the political backing that has already been identified behind some actions; the financial burden in implementing the action (regardless of who would carry this burden); and the complexity in terms of the number and size of the organisations

that would be involved in the implementation of the individual actions (as well as taking into consideration their current efforts towards achieving the action in question).

The benefits of adopting this approach are that:

- it takes into account that some actions although extremely difficult to implement make an important contribution to achieving the vision
- the process allows for 'quick wins' to be identified. Although these may make a lesser contribution to the overall strategy objectives, due to their ease of implementation they are a perfect opportunity to raise the profile of the issue and bring about immediate change.

Presentation

The full range of actions for London is presented in the tables in section 6.4. There is a table for each one of the eight stages of the food system identified in the Strategy framework, and each table follows an identical format.

- The title is a summary of the Vision statement for that stage of the food chain.
- The left hand column presents the individual components of the Vision.
- The middle column presents the prioritised actions for each element of the Vision.
- The right-hand column identifies the probable implementation partners that would need to work together in the implementation of the possible actions. As a general note, the London Food Board is expected – in its overarching role - to oversee all work on the Strategy and so has only been identified where it will be the sole body through which the action in question can be implemented.

Key actions are highlighted **in bold**. These bolded actions are then clustered and organised together in to the **six priority themes** that are outlined in section 6.5.

6.4 The Detailed Actions

Stage 1: Primary production

London's principal role will be, through its purchasing habits, to contribute to a vibrant and sustainable farming sector in the UK, and beyond.		
Vision	Actions	Probable implementation partners
<p>Food consumed in London will be produced to the highest possible environmental, nutritional and ethical standards</p>	Increase organic food production within London and the surrounding regions in response to consumer demand	Defra, GoER, GoL, GoSE, NFU, Soil Association
	Ensure that, as far as practicable, food grown in London is GM free.	ALG, GoL, London Boroughs, NFU
	Reduce illegal meat trade in London	Defra, C&E, EHTS, FSA, LACORS, MPA
	Reduce "Gangmasters"/illegal migrant labour	Defra, DTI, ETIG, retailers
	Implement high standards of environmental farm management schemes	Defra, EEDA, GoER, GoL, GoSE, NFU, SEEDA, Assured Food Standards
Ensure climate change impacts on agriculture are considered in mitigation and adaptation studies/strategies in London	Defra, GoL, LDA, NFU, GoSE, SEEDA	
<p>More of London's food will be 'local' and diverse – that is, wherever practical, it will come from the surrounding area, neighbouring regions and from elsewhere within the UK and reflect the consumer preferences of London's increasingly diverse population.</p>	Increase food production within London, in response to demand	Defra, EEDA, LDA, NFU, SEEDA
	Implement brokerage service to improve intra- and inter-regional links between farmers and consumers	Defra, FARMA, FFB, LDA, LFM, NFU, GoSE, Regional Food Groups, retailers
	Expand individual & community growing in response to demand (e.g. allotments, community gardens, parks & open spaces, school grounds, etc.)	ARI, FCFCG, GoL, voluntary sector
<p>London farmers will be competitive and achieving strong economic success.</p>	Increase produce diversification to supply and meet the London market	Defra, EEDA, LDA, NFU, SEEDA
	Deliver training, advice and market information to farmers	Defra, LDA/BL, LFL, NFU
	Develop producer collaboration schemes	Defra, LFL, NFU, English Food & Farming Partnership

Stage 2: Processing & Manufacturing

London's role will be to specify and expect high standards from processors based outside the capital that are supplying London; and to both expect and support such standards within London itself.		
Vision	Actions	Probable implementation partners
All food processing enterprises that supply London will operate to the highest environmental standards, and they will provide the highest possible standards of working terms and conditions for their employees.	Develop environmental assurance schemes for sector	CIEH, EHTS, FDF, LACORS
	Support enforcement of existing health & safety and environmental legislation	CIEH, EHTS, London Boroughs
	Provide environmental support/facilitation to business	EHTS, CIEH, LDA/BL4L
	Campaign for high and fair working standards & conditions	EHTS, DWP, Trade Unions
The economic viability of the food and drink processing sector in London will be supported, and the sector will be encouraged in its endeavours to contribute to the wider health of London's local economies.	Provide entrepreneurial and business support	BCC, LDA/BL4L, voluntary sector
	Provide training/skills programmes	BCC, LDA/BL4L, LSCs
	Aid businesses in the sector in their recruitment & retention policy	BCC, LDA/BL4L, LSCs
The processing of all types of food will be more sustainable – whether fresh food, lunchtime snacks, ready-meals or otherwise. Food and drink processors/manufacturers will operate to the highest nutritional standards, they will incorporate ingredients with a low environmental impact, and they will reflect the full range of London's culinary and cultural diversity.	Provide support on sustainable product innovation	BCC, DTI, LDA/BL4L, Trade Associations
	Deliver voluntary assurance schemes in London - particularly to SMEs	EHTS, FDF, FSA, LDA

Stage 3: Transport, Storage & Distribution

London will have a food distribution infrastructure that is not merely economically efficient, but is environmentally efficient and socially just.		
Vision	Actions	Probable implementation partners
By 2016 the overall negative environmental impact of the food distribution system will have been reduced.	Undertake R&D into quantifying environmental impacts of food transport, building on recent Government research ²⁰⁵	Defra, FCRN, GoL
	Develop and promote more effective labelling schemes	Industry
	Devise programmes to minimise environmental impacts of sourcing and logistics strategies	CPE, London Boroughs, NHS PASA, retailers
Clear measures to be put in place to reduce the level of greenhouse gases, air pollution, congestion and noise arising from the transportation of food	Implement low emission zone to reduce emissions of PM ₁₀ and NO _x	Defra, DfT, TfL
	Support ongoing improvements in vehicle efficiency and use of alternative fuels & technologies	Defra, DfT, TfL, Transport 2000, Travelwise,
	Develop local and sub-regional logistics and wholesaling partnerships Continue to encourage more sustainable modes of transport	LDA, London Boroughs TfL, Travelwise, Transport 2000 London Boroughs
More effective and affordable distribution channels will be available to producers/processors of all sizes and ownership structures	Establish local food distribution/wholesaling hubs Consider/research role & scope of London's wholesale markets	ALG, LDA, Sustain
Clear mechanisms will be in place – in particular strategic arrangements between private and public sector partners - to ensure London's food security (i.e. the availability of sufficient food) in the case of extreme events (such as terrorism, major floods, fuel crises etc).	Establish and maintain sufficient food storage capacity in London	GoL
	Formulate plans for back-up food transport mechanisms/routes	GoER, GoL, GoSE, TfL

Stage 4: Food Retail

Those responsible for selling food will be playing a transparently positive role in progressing towards a healthier and more sustainable food system for the capital.		
Vision	Actions	Probable implementation partners
There will be a robust, balanced and “healthy” diversity of food retailing, in terms of both size and type of ownership.	Advice & support programmes for local independent stores	Alliance of Independent Retailers, LDA, London boroughs, voluntary sector
	Advice & support programmes for street markets	London Boroughs
	Advice & support for farmers markets	FARMA, LFM, London Boroughs
	Expand direct selling between producers and consumers	FARMA
	Advice & support for specialist markets	FARMA, London Boroughs
Good employment and operational conditions will prevail throughout the food retail and catering sectors. Employees should be equipped with the skills necessary both to support the prosperity of the enterprises for which they work and to help Londoners make healthy and sustainable food choices. Businesses will operate to the highest environmental standards, with good health and safety records and good terms and working conditions for their employees.	Support enforcement of existing Health & Safety and environmental standards	CIEH, EHTS, retailers
	Expand voluntary assurance schemes	BCC, CIEH, EHTS, retailers
	Support skills & training programmes in the retail and catering sectors	CIEH, EHTS, LDA, LSCs, NTO, retailers, trades unions
The economic importance of the food retail sector in London will be recognised and supported	Identify and support food clusters (both retail and manufacturing) in London	LDA, GoL, London Boroughs
	Provide entrepreneurial and business support, particularly to SMEs	BCC, LDA/BL, London Boroughs
Food retailers will use their best endeavours continuously to improve the quality of the products they sell, including an increase in the proportion of food sold that is healthy, culturally appropriate, ethical and environmentally beneficial.	Integrate food within mainstream tourism strategies	LDA Sub-Regional Tourism Strategies, LFL, LTB, GoL
	Devise programmes to raise environmental/nutritional standards from suppliers	LDA, Retailers, Sustain, voluntary sector
	Initiate London Food awards	LFB, London Food Link
	Devise programmes to increase the sale of Fair Trade products in London	Fairtrade Foundation

Stage 5: Purchasing Food

How and why Londoners buy their food will be the principal means by which London contributes to a healthy and sustainable food and farming system in the UK.		
Vision	Actions	Probable implementation partners
<p>Healthy eating should not be consistently or dramatically more expensive than alternatives, and no-one in London will struggle to access healthy, affordable and culturally appropriate food</p>	<p>Identify & support successful Food Access projects</p>	<p>LDA, London Boroughs PCTs, schools, voluntary sector</p>
	<p>Include food access issues within Local Development Plans, and respect the importance of town centres in providing sustainable access</p>	<p>London Boroughs</p>
	<p>Continue to make the case for the restriction of promotion of unhealthy food to children</p>	<p>DCMS, DoH/RPHG, GoL</p>
	<p>Develop pilot projects integrating major retailers with local food provision & regeneration plans</p>	<p>London Boroughs, retailers</p>
<p>The wider social benefits of healthy diets will have been recognised, quantified where possible, and incorporated into the public and private sectors' (and individuals') purchasing decisions, by the use of appropriate subsidies, regulations, regulations and other economic instruments.</p>	<p>Continue to research and quantify wider social and personal benefits of more healthy and nutritious diets</p>	<p>LDA, Defra, DH, DfES</p>
	<p>Instances of market failure – where environmental and social costs are not being captured or addressed through the normal operation of the market – will be tackled through specific intervention.</p>	<p>Research possible progressive fiscal incentives/drivers to help change behaviour</p> <p>Devise and pilot innovative intervention schemes, including integration with regeneration and redevelopment projects.</p>
<p>All Londoners will have sufficient awareness and understanding of food-related issues to make informed choices.</p>	<p>Enlist retailer assistance in promoting healthy eating</p>	<p>FDf, FSA, GoL, London Health Commission, retailers</p>
	<p>Develop a directory on healthy eating & sustainable food</p>	<p>LFL, Sustain, voluntary sector</p>
	<p>Increase the number of school farm visits</p>	<p>DfES, FCFCG, London Boroughs, schools</p>
	<p>Enhance and promote existing food labels</p>	<p>LFB</p>
<p>All public sector organisations will properly embed sustainability within their procurement strategies and</p>	<p>Establish a pilot sustainable/healthy reward card scheme in London</p>	<p>DoH/RPHG, London Boroughs, retailers</p>
	<p>Enhance and extend public procurement support services and tools, with both local authorities and central government</p>	<p>ALG, CPE, Defra, GoL, LDA, London Boroughs, ODPM, Sustain</p>

<p>they will explicitly address food issues.</p>	<p>departments</p>	
<p>Sustainable food procurement strategies should be widespread across the general business community, and throughout the restaurant and catering sector.</p>	<p>Establish/promote private procurement support services and tools</p>	<p>BCC, CPE, LDA/BL4L, London First, Trade Associations, London Remade</p>

Stage 6: Food Preparation, Storage & Cooking

This Strategy categorically cannot – and does not - seek to prescribe or tell Londoners how they should eat. Rather, the strategy seeks to provide the opportunity and means for many more Londoners to prepare and cook their own food.		
Vision	Actions	Probable implementation partners
<p>Many more Londoners – men, women and children – will be able to prepare food and/or cook; food preparation and cooking will be a gender-neutral activity; and all Londoners will have the knowledge, confidence and means to store, prepare and/or cook a diverse range of food which is healthy, retains its nutritional value and is safe for consumption</p>	<p>Run a healthy cooking and eating communications campaign</p>	<p>DoH/RPHG, PCTs, retailers, voluntary sector</p>
	<p>Expand the number of cooking classes (for both adults and young people) in response to demand</p>	<p>DoH/RPHG, FE sector, PCTs</p>
	<p>Increase & improve cooking & food education in schools</p>	<p>DfES, DoH/RPHG, London Boroughs</p>
<p>Food preparation and cooking for public consumption – for example in schools, hospitals, residential care homes and prisons – will be conducted to the highest possible standards and the investment needed to achieve this should be within mainstream budgets</p>	<p>Provide training, information and guidance for cooks and dinner-ladies</p>	<p>DfES, DoH/RPHG, London Boroughs, LSCs, NHS PASA, Prison Service, LDA</p>
	<p>Improve facilities for storing, preparing and cooking food</p>	<p>DfES, London Boroughs, DH</p>
	<p>Improve quality of ingredients</p>	<p>ALG, Caroline Walker Trust, DfES, DoH/RPHG, LACA, London Boroughs, NHS PASA, Soil Association</p>
	<p>Use facilities and opportunities available to provide meals for consumption by the general public</p>	<p>DfES, DH/RPHG, NHS, London Boroughs, Prison Service</p>
<p>Londoners will be more aware of the environmental impact of storing, preparing and/or cooking food, and will have the knowledge and access to appliances that will allow them to be able to choose more environmentally friendly means of doing so</p>	<p>Increase the profile of environment labelling schemes for kitchen appliances.</p>	<p>EST, retailers</p>
	<p>Increase the use of renewable/green energy tariffs</p>	<p>Energy Companies, EST</p>
	<p>Increase the use of energy saving measures/installations</p>	<p>Carbon Trust, Energy Companies, EST, London Boroughs</p>

Stage 7: Eating & Consumption

Londoners should have the confidence, awareness and understanding to eat healthily, and in ways that contribute to wider environmental and social goals; and, where an individual has caring responsibilities, they should be able to feed their dependent(s) in a healthy and sustainable fashion		
Vision	Actions	Probable implementation partners
Awareness of nutritional and quality issues should be extremely high, throughout the capital	Research effectiveness of current 5 a day campaigns and modify and expand in light of research findings	DoH/RPHG, PCTs, retailers
	Increase healthcare professional training/engagement	DoH/RPHG, PCTs
	Establish personal health advisors programmes	DoH/RPHG, PCTs
	Develop and promote London 'Healthy Eating' award (aimed at residents, employees etc)	LFB
	Promote safe drinking	DoH/RPHG, London Boroughs, PCTs, pub and restaurant industry, retailers
Parents, in particular, will be supported and encouraged to provide healthy nutrition to their children, from the pre-natal stage onwards, and, irrespective of their cultural background, mothers should be helped and encouraged to breast-feed their babies	Increase the cultural acceptability of breastfeeding in public places – through 'safe' breastfeeding locations at shops and restaurants	DoH/RPHG, London Boroughs, PCTs, and restaurants.
	Increase pregnancy/infant advice & support	DoH/RPHG, PCTs
	Develop and pilot voucher schemes	DoH/RPHG, LDA, PCTs, RPHG, social/voluntary sector
Food in London - across the diversity of cuisines and cultures - should be promoted and celebrated; Londoners will have ample opportunity to eat in convivial settings; and the opportunity to spend the time they personally need to enjoy food/the eating experience should be widely available	Raise awareness of the seasonal, local and quality aspects of food, and promote the concept of "slow food"	London Boroughs
	Engage employers to ensure adequate time for lunch	BCC, CBI, London First
	Promote existing and support further London Food Events	LFB, LTB
	Strengthen the food element at a range of annual London events	LTB
Children, in particular, will have access to a range of nutritious, affordable and appealing food & drink; so too will those with special dietary needs.	Increase the provision of fresh fruit at schools	DfES, DoH/RPHG, London Boroughs
	Improve access to (sustainable) water in both primary and secondary schools	DfES, DoH/RPHG, London Boroughs
	Establish, expand and promote school breakfast clubs	DfES, DoH/RPHG, London Boroughs
	Increase the number of children eating healthy school meals	DfES, DoH/RPHG, London Boroughs

	<p>Introduce green/healthy vending machines</p> <p>Research extent to which those with special dietary needs need additional support</p>	<p>DfES, DoH/RPHG, London Boroughs</p> <p>DoH/RPHG, LFB</p>
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Stage 8: Disposal

London will, by 2016, be taking far greater responsibility for its food and food-related waste		
Vision	Actions	Probable implementation partners
The amount of food-related waste (organic and packaging) will be minimised	Increase the coverage and take up of household composting schemes	London Boroughs, Waste Authorities
	Consider feasibility of household kitchen waste collection schemes (following on from Proposal 25 in the Mayor’s Municipal Waste Management Strategy)	London Boroughs, Waste Authorities
	Support & expand existing kitchen/food waste collection schemes in London	London Boroughs, Waste Authorities, Community recycling groups
	Research household food waste attitudes, behaviour and incentives	GoL, WRAP
	Develop/promote “smart cooking” guides as part of healthy eating materials (e.g. education on “sell by/use by” dates)	London Boroughs, LHC, DoH, GoL, Sustain
	Encourage composting schemes for commercial waste	LDA, NFU, retailers, Trade Associations, London Remade
	Encourage community compost schemes	LDA, London Boroughs, LCRN
Food-related waste will be composted and recycled wherever practicable; and progress made on closing the waste “loop”	Engage street and farmers markets in dealing with food/food packaging waste	LFM, London Boroughs
	Continue to expand household recycling efforts re food packaging waste (cardboard, Tetra Pak, etc.)	London Boroughs, Waste Authorities, London Remade
	Support ongoing efforts to engage the packaging industry on minimising, recycling food packaging waste and piloting innovations	Representative bodies (e.g. INCPEN, Valpak), WRAP, retailers
The problem of food-related litter will have been significantly reduced	Engage commercial businesses, working with the GLA and others to consider food waste issues in relation to the development of the Mayor’s Wider Waste Strategy.	LDA, London First, retailers
	Investigate a reduction in the use of plastic carrier bags, including pilots with large retailers	London Boroughs, retailers
The problem of food-related litter will have been significantly reduced	Promote and monitor the voluntary code of practice for retailers	London Boroughs, retailers, Capital Standards Network
	Campaign aimed at Londoners to engender a sense of personal responsibility for waste and litter	London Boroughs, ENCAMS, Capital Standards Network

6.5 The Priority Actions

Within the set of identified actions, an array of key priorities emerges. These are the actions which appear **in bold** in the table in section 6.4. These are considered to offer the best opportunities for impact; undertaken, they are considered most likely to initiate and/or accelerate change in the direction of health, sustainability and equality sought by the Strategy as a whole. The top priority actions have been clustered into **six priority areas**.

It is important to recognise that the resource implications of these priorities have not been systematically considered. Wherever practical, note has been made of existing or planned work that is relevant to the action in question; but operational decisions about how best to move forward with the priority areas will need to be taken once this Strategy is adopted. Some remarks on this appear in Section 6.6, following the detail of the proposed actions.

The six key priority themes - in no order of importance - are:

- ensuring commercial vibrancy
- securing consumer engagement
- leveraging the power of procurement
- developing regional links
- delivering healthy schools
- reducing waste

Set out below, for each of these six, are details of the proposed actions, together with brief commentary on the likely implementation partners, and a selection of illustrative case studies.

6.5.1 Ensuring commercial vibrancy

Ensuring the commercial vibrancy of the food sector in London offers direct economic and food security benefits, and indirect health, cultural, social and environmental benefits.

In the case of the former, a food sector (comprising farmers, food processors, those that distribute and retail food, as well as restaurants and catering companies) that is diverse, robust and vibrant will provide a rich range of employment opportunities, and generate income in a variety of ways. It will also guard against vulnerability – a system that is too rigid, too monolithic or too dependent upon a narrow base will not have the resilience required of a 21st century food system.

More indirectly, a food sector that is economically healthy will be more likely to be able to contribute to and deliver the range of health, cultural, social and environmental benefits sought by this strategy.

Whilst the normal operation of market forces will continue to deliver the benefits of competition to London and Londoners, it cannot be assumed that the full range of social, community, cultural and health benefits will automatically emerge from these forces; nor that they will be distributed in a just fashion across London's diverse communities.

For these reasons, the following key actions are called for.

- Support to the farming sector through the facilitation of producer collaborations, support in market/product innovations, and the promotion of 'direct selling' initiatives (see "Regional Links" for more details).
- Business support and advice to specialist food manufacturers and processors, particularly on consumer market trends, and particularly for SMEs and enterprises that reflect London's diverse communities.
- Support and development of economic food "clusters" in London (e.g. restaurant clusters in Brick Lane, China Town; manufacturing clusters at Park Royal, ethnic food clusters, etc.), as well as continued support to London's many town centres.
- Continued attention through spatial planning to the differing needs of small, predominantly town-centre retailers, and large, often out-of-centre retailing, so as to support the overall objectives of the food strategy, including the needs of London's diverse communities.
- Support to logistics and distribution partnerships (see "Regional Links").
- Provision of training for food retail and manufacturing employees, particularly to smaller enterprises, in terms of nutrition and health issues alongside more generic transferable skills (such as English for recent migrant arrivals).
- Attention to the attraction and retention of food-related enterprises, and the promotion of food exports.
- Promotion of food tourism and food culture, domestically and internationally, in particular through continuing and strengthening the food links within "Visit London" (and the communications campaign proposed in Section 6.5.2)..

The precise form of support will vary across these issues, and details will need to be developed. However, it will necessarily involve issues of town planning, retail strategies and regeneration. It is important to recognise the work already going on to support the commercial food sector, both within London and the other English Regions. The latter have already undertaken much work promoting food tourism, and so there are significant opportunities to learn from/work in partnership with the surrounding regions.

The principal organisations that will need to be involved in delivering this aspect of the food strategy will come from the public sector (notably the London Development Agency/Business Link [particularly in the context of the LDA's new Production Industries Strategy] and Visit London, GLA [notably the London Plan team]); the private sector (notably the large manufacturers/processors and large retailers); and representative bodies (including London First, CBI, CoCs, Food and Drink Federation).

COMMERCIAL VIABILITY CASE STUDIES

The Surrey Curry Club – Health & Safety compliance

The Surrey Curry Club was launched in March 2004 as a way of tackling the long-standing problem of excess artificial colours in the popular dish of Chicken Tikka Masala. The aim of the club is to achieve compliance by the trade and raise awareness among consumers of the possible health risks associated with artificial colours. Trading Standards worked with the industry, and colleagues from

Environmental Health, to produce a guidance booklet, which was distributed to all "Indian" restaurants and take-aways advising them of trading standards and environmental health requirements, and of the Surrey Curry Club.

Trading Standards then purchased samples of Chicken Tikka Masala from local businesses and those that met the requirements were invited to become members of the Club. All businesses must meet strict terms and conditions including compliance with both trading standards legislation and food hygiene regulations.

The Goods Shed – Direct selling

The Goods Shed opened in August 2002 as the first full-time farmers market in the UK. Originally an industrial railway depot bringing coal into the city, laid derelict for twenty years, the Goods Shed now brings edible goods to Canterbury directly from the surrounding region. This gives the producers a larger slice of the selling price of their product as well as providing consumers with an insight into food production.

The first step was to amalgamate the vegetable and fruit farmers into a co-operative where they can still set their own prices but split costs on the manning of the stall. Today the Goods Shed includes a restaurant with a daily menu sourced from the market, an onsite butcher, bakery, smokery and brewery. It also now supports a range of independent stalls.

Wrights Millers – small producer

Established in 1897, Wright's is London's only family owned mill, operating in Ponder's End on a site which has been used to mill grain since 1086. Their market strength is based on quality and innovation. They employ 70 staff with an annual turnover of £10m. Today, approximately half of output is sold into Greater London, with around 40% of sales to small bakeries. Wright's also sells to factories, including a pitta baker based in Edmonton. Wright's produces flour for ethnic breads, such as chapatti flour, through cash and carry outlets. Small bags of flour are sold, such as batter flour used by Chinese restaurants to Chinese retailers and cash and carry stores or for home baking.

6.5.2 Securing consumer engagement

Without the engagement, enthusiasm and awareness of all Londoners, they will be less likely to choose, prepare and consume foods that will benefit their health. Likewise they will be less likely to exert their considerable influence as consumers - upon producers, manufacturers and retailers – to engender sustainability across the entire food system in London and beyond.

Therefore, a programme of consumer engagement - to enable positive behavioural change and promote consumer choice, throughout London's diverse communities – must be a fundamental part of this strategy's delivery.

A central plank will be a communications campaign aimed at Londoners - consistent with the core principle of informed choice - building on the recent political and public momentum generated by the "Choosing Health" White Paper and the Food & Health Action Plan, and linking to other key communications initiatives (e.g. the 5 A DAY programme). The communication campaign should also acknowledge the benefits to employers of London having a healthy workforce.

However, it is important to acknowledge that awareness alone does not necessarily lead to sustained behaviour change. A growing body of work – for example that summarised as part of the recent review of the UK Sustainable Development Strategy – reflects on a consistent “gap” between attitudes *in theory* and behaviour *in practice*. In order to bridge this gap, Londoners need to put their intentions into practice. However, their ability to do so can be limited by the inability to grow, prepare or cook food.

For these reasons, the following key actions are called for.

- A high profile campaign aimed at Londoners, based on research into the most effective communication methods. This should be public health-led, aimed specifically at promoting *healthy foods, safe drinking and preparation methods* (and probably linked to the 5-A-Day programme). The campaign should also incorporate a range of other messages within its portfolio, including issues of *quality, tourism, enjoyment* and the promotion of existing London success (e.g. Borough Market); and will need carefully to take account of the needs of London’s diverse audiences.
- Engage the large retailers to promote healthy eating choices in London (including the issue of existing labelling and assurance schemes) that offer them market opportunities.
- Promote existing opportunities for individuals and communities to grow food, through gardens, orchards, schools, allotments and parks & open spaces, and consider developing and expanding these in response to demand.
- Promote and support London food events and festivals that celebrate the quality and diversity of food in London, alongside parallel work to ensure that food plays a stronger role in the wide range of other events and festivals held across London every year.
- Explore, undertake a feasibility study and (subject to this) pilot a London “Reward Card” scheme that encourages food choices that contribute to healthy, social and/or environmental objectives.
- Support pregnancy/infant advice support – as part of a wider health advice package - by engaging GPs, Sure Start schemes; and pilot personal health advisors in London (as part of the national scheme as outlined in the Choosing Health White Paper).

In terms of the communications campaign, there is a choice to be made between a PR, advertising or social marketing approach. Valuable lessons need to be incorporated from the successful *Recycle for London* campaign. Similarly, the National Consumer Council are currently exploring social marketing approaches to health messages, while Futerra have developed, on behalf of Defra, “the rules of the game” for communicating environmental messages.

There is significant potential to utilise the communications apparatus provided by the Mayor, the GLA, GoL, the members of the London Food Board, Government departments (Defra, Dfes, DoH), Primary Care Trusts, boroughs and retailers. Collectively, these organisations and individuals have an enormous capacity and potential to present coherent messages on healthy cooking and eating within London. Together they can play a major part in addressing health inequalities.

In terms of the more proactive and engagement-focused actions outlined, there are already many community-level initiatives that address health inequalities and

promote basic cooking skills. For young infants and children relevant programmes to engage include Sure Start, schools and the range of breastfeeding initiatives run by the boroughs, PCT and health service. These need to be built upon and expanded.

Given the range of engagement actions put forward, a wide range of organisations need to be involved, ranging from large retailers and public services through to community based initiatives, voluntary groups and social enterprises. These smaller and grass routes organisations may be particularly well placed at the local level to deliver several aspects of this priority theme.

CASE STUDIES

5 A DAY health communications campaign

The government run 5 A DAY programme aims to encourage people to eat more fruit and vegetables as part of a healthy balanced diet. It has five strands.

- School Fruit & Vegetable Scheme.
- Local 5 A DAY initiatives.
- National/local partners – Government Health Consumer Groups.
- Communications programme including 5 A DAY logo.
- Work with industry - producers, caterers, retailers.

The Communications programme focuses on the 5 A DAY logo. This logo is used on promotional materials, such as printed leaflets, website information, food packets and carrier bags. There are also four TV adverts.

The logo can be used to show how many portions of fruit and vegetables a typical serving of the food contains. The 5 A DAY logo and portion indicator will help people to choose a diet with plenty of different fruit and vegetables.

“Sid the Slug” campaign

The Food Standards Agency in August 2004 launched a £4 million campaign to encourage the public to eat less salt which will lower blood pressure and reduce the risk of heart failure. The Sid the Slug campaign includes a series of TV, poster and print adverts featuring the animated Sid the Slug character.

“Eat the View” campaign

This initiative was launched by the Countryside Agency to assist consumers to understand the connections between the food they buy and the countryside they value. It looks to help increase demand for locally and regionally distinctive products that help reinforce the character of the countryside. Through working to enhance market opportunities for producers and growers as a result of product identity with land management systems they promote the character, diversity and environmental value of the landscape.

UNICEF – Breast-feeding campaign

The UNICEF UK Baby Friendly Initiative provides a framework for the implementation of best practice by NHS Trusts and other health care facilities, with the aim of ensuring that all parents are helped to make informed decisions about feeding their babies and that they are then supported in their chosen feeding method. The initiative offers courses, workshops, conferences, onsite advice, written materials for the accreditation and information packs for mothers.

Centrepoint food action – cooking skills

Centrepoint is a registered charity and a housing association, providing a whole range of accommodation and support for young, homeless people across Greater

London. Their food action project is working to help Centrepunt users to access and maintain healthy, balanced diets, through the provision of practical and educational support in cooking workshops. The life skills and youth work services team have also started delivering workshops entitled 'budgeting for food' – learning outcomes include being aware of the differences in prices between different types of shops, becoming aware of how to compare prices of different food items and learning practical ways to save money when grocery shopping.

Community agriculture - Bolton's Gathering of Organic Growers

The Gathering of Organic Growers initiative in Bolton is a network of community organic food initiatives. These initiatives encourage healthy eating, exercise and improved access to healthy food by involving members of the local community - particularly disadvantaged and hard-to-reach groups - in growing fruit and vegetables. Any local people can get involved in growing their own food, and they then share out the produce. Others might come along to learn on the plots for a couple of months and then use the knowledge gained to grow at home.

6.5.3 Levering the power of procurement

Public sector procurement is already and rightly seen as offering enormous potential for transforming markets and driving innovation and behaviour for sustainability. The public sector in England spends £1.8 billion on food and catering services. Therefore, providing appropriate services to increase the opportunities for domestic producers to compete for business has the potential to support London's food economy, to reduce the environmental impact of London and – both directly and indirectly – contribute to the improved health of Londoners.

The procurement requirements, incentives and the legal framework within which the **private sector** operate are very different to the public sector, and consequently their requirements for procurement advice and services will be different. Nonetheless, the scale and scope of the potential impact is such that private sector procurement practices must be targeted.

For these reasons, the following key actions are called for

- Establish/promote existing public procurement support services and tools²⁰⁶, for both procurement officials specifying contracts and those organisations seeking to access the contracts (targeted and differentiated approaches will be required for these difference audiences).
- Encourage exemplar procurement practices on food issues within the GLA family.
- Complete and evaluate the pilot initiative with hospitals and, if successful, expand the scheme across hospitals in London and consider transferring to other public services (e.g. prisons). Dissemination of the knowledge gained through the pilot will be a priority.
- Improve the access of smaller producers to public and private sector procurement contracts. The ability of producers to engage in greater collaboration and cooperation is important; and networking events between producers and procurement officials in London should also be explored.
- Establish/promote existing private procurement support services and tools.

There is also a range of current initiatives in London that have important implications for food issues. For example, the Government has committed to becoming an EU leader in sustainable procurement by 2009, with Regional Centres of Excellence responsible for taking forward the actions of the National Procurement Strategy for Local Government. These centres will be asked to champion a number of procurement issues, including food.

Furthermore, Defra have also recently developed the *Public Sector Food Procurement Initiative* which provides a range of tools and materials to procurement officers (www.defra.gov.uk/farm/sustain/procurement/index.htm). This links in with other Government initiatives such as the Healthy Living Blueprint for Schools, Choosing Health: a food and health action plan, and FIVE-A-DAY. Furthermore, the Mayor's Green Procurement Code may also provide valuable opportunities for food, either in terms of expanding the code to include food issues (e.g. Fair Trade, Waste Minimisation) or simply learning from the Code's experience to date. London Food should explore the potential for coordination with the Mayor's Green Procurement Code.

London should look to accelerate the progress of these initiatives, working with the CPE, LDA, GLA, ALG, London Boroughs, Defra ODPM and GoL. This work should look to incorporate the Sustainable Development Commission's (SDC) work on food procurement for health (which focuses on procurement by the National Health Service).

In terms of private sector procurement, the LDA/Business Link, Chambers of Commerce, London First and the Centre for Procurement Excellence will need to work with the private sector and trade associations to establish the best way to help the private sector to first achieve and then surpass best practice on sustainable food procurement.

CASE STUDIES

Hospital Food Project – public procurement

The Soil Association and London Food Link's Hospital Food Project is a two-year project aiming to increase the proportion of local and/or organic food to 10% of the catering provision of four London NHS hospitals. These are St. George's in Tooting, Ealing General, The South London and Maudsley in Kent and The Royal Brompton and Harefield in Chelsea. This will help to promote health by providing fresher and more nutritious food for patients, staff and visitors, and will help support local communities by keeping money and jobs in the local food and farming sector.

Marks & Spencer – private procurement

Marks & Spencer have increased the amount of UK-grown Gala apples in the September to February UK season in 2004 from 40 to 95%. Their aim is to stock 100% UK-grown Gala apples throughout the season in 2005. Making this shift involved close work with 14 selected growers in Kent, Suffolk, Worcestershire and Essex. Marks & Spencer also stock other popular UK apples such as the Cox, which is the most popular UK apple, accounting for nearly 50% of our UK apple sales. Another popular apple, the Braeburn, will increasingly be sourced from UK growers in season rather than orchards in France, Germany and Italy. They started selling Braeburns grown in Kent, where the growing season is longer, in 2001. Their eventual aim is to supply all European season Braeburns from England.

6.5.4 Developing regional links

The sheer size and diversity of the market in London is such that it has a strong regional (and indeed national) presence and role. All of the UK regions have a stake and interest in a strong and vibrant London food economy.

Therefore, there is a need to recognize and improve the ability of producers and manufacturers in and around London – and from the UK more widely - to access the London market. Reconnecting producers with consumers in London will not only provide environmental benefits from reduced transport, but will also provide regional and national economic benefits; benefits locally to the farming community and, by extension, the vitality of rural areas; and improved access to fresh produce for Londoners.

To improve the access producers have to the London market, there must be *demand* for their produce; they must be able to physically be able to *distribute* their produce to London; and there must be *retail opportunities* for selling the produce once it gets here.

Therefore, the following key actions are called for.

- Encourage innovation among producers to meet the demand from London's consumers, for example through product diversification (e.g. ethnic foods); organic food production to meet this niche market; ensuring high standards of production and quality; and sourcing food products in ways that promote and enhance bio-diversity (which includes not just land-based impacts, but impacts on fish stocks and marine life).
- Encourage producer collaboration and cooperation, in order to share ideas, marketing costs and fund product innovations, and access public and private sector procurement contracts.
- Research the feasibility of developing a secondary food hub distribution system that operates in parallel to the mainstream distribution network and enables smaller farms to share resources and distribution mechanisms for mutual benefit and access the London market. This research should take account of the current review of London's existing wholesale markets at Covent Garden Market, Billingsgate, Smithfield, Spitalfields and Western International.
- Encourage, co-ordinate and broker – as appropriate – local and sub-regional logistics partnerships.
- Promote opportunities for producers to sell into the London market, through a mix of direct selling (e.g. box schemes, farmers markets, speciality markets, etc.); selling to London's restaurants and independent stores; and, crucially, sales to the major retailers.

Several of these actions will need to build on existing work. For example, producers will increasingly need to take into account consumer trends and demand following the revisions to CAP; farmers markets and speciality markets are well established in London and need support to expand further; and there are already several schemes and measures to encourage greater collaboration among producers. These initiatives need to be supported, expanded and/or accelerated.

The work of TfL and the London Sustainable Distribution Partnership to develop a Freight Plan for London is important here; so, too, will be the research by Sustain/Professor John Whitelegg.

In terms of implementation partners, the GLA, LDA, GoL and GoSE, the National Farmers Union, Food from Britain, Regional Food Groups and Defra need to establish what additional help farmers need in order to raise the profile of their produce and the regional qualities it possesses.

On the issue of distribution, Sustain, ALG, GLA, GoL and the LDA need to build on the existing work in this area to explore the opportunities available.

And in terms of retail opportunities, those who are involved with helping farmers sell direct to the public should work alongside the London Boroughs and the GLA to provide support, planning and retail strategies that promote appropriate venues. Simultaneously, effort needs to ensure that Londoners are able to access these opportunities.

CASE STUDIES

Gear Farm – adding value to produce

Gear Farm in Helston, Cornwall has developed a thriving business using converted pigsties to run a farm shop and also processing units for local producers both to supply the shop and develop their own businesses. Some old pigsties on the farm had been redundant for 20 years and, with the aid of a small European grant, one was renovated for the shop premises. Vegetables are picked every morning and a surplus grown to ensure that only the perfect ones are put out. It was decided to convert the other redundant pigsties into processing units that could be rented out to local small scale producers.

Producer co-operative - Eostre Organics

Eostre Organics is an organic fruit and vegetable producers' co-operative for East Anglia. The co-operative was formed by organic producers in the region who grouped together to develop direct and local markets for their produce. The members encompass a wide variety of organic farms including a 1 acre glasshouse, a 2 acre Suffolk small-holding, a 26 acre fenland market garden and a 900 acre Norfolk estate, as well as a partner Italian co-operative. Following funding through the Rural Enterprise Scheme they have grown in success and are currently supplying a range of independent retail outlets, farm shops, farmers' markets, charter markets, community groups, co-operatives, box schemes, processors and public sector caterers in East Anglia and beyond.

Waitrose – local food

Waitrose is currently running two separate schemes to boost its provision and support of local products and producers. Firstly, it has launched its Small Producers Awards 2005 competition to promote small businesses that make quality food and drink. Secondly, it has started two trials to give customers the chance to purchase locally farmed fruit and vegetables. These are running at its Kent branches and certain stores in Gloucestershire and Monmouthshire.

Box schemes – Abel & Cole

Box schemes are now one of the fastest growing forms of direct selling in the UK. The original concept was developed by vegetable growers to shortcut the extended food supply chain in order to sell their fresh produce direct to local consumers; increase the farmers share; and reduce food miles. Set up in 1988, Abel & Cole is one of the UK's fastest growing organic retailers, supplying 10,000 households every week with seasonal fresh produce and a wide range of British organic foods. They also run a not-for-profit venture called The Farmer's Choice

that enables schools to raise funds and encourage healthy eating. All delivery vehicles run on liquid petroleum gas and all surplus produce is offered to Fareshare, a charity which redistributes food to social projects across London. The rest is taken to Vauxhall City Farm for animal feed for their cows, goats and pigs and for their new composting scheme.

6.5.5 Delivering healthy schools

Schools have a fundamental role in the food system in London: they have the opportunity to provide pupils with healthy meals at least once a day; they can educate children about food, nutrition, healthy eating and the environment; they can equip children with the skills they need to make informed choices and prepare their own food; and they can equip children to educate and pass on knowledge to their parents and peers. More than any other group in London, children need, indeed are entitled to, strong guidance.

Focusing on all of these opportunities offers the scope for both immediate and longer term health, behavioural and environmental benefits. This is not an easy win or short term objective; there are indeed a number of significant barriers to overcome, including catering skills, the lack of flexibility in some existing contracts with suppliers, appropriate cooking facilities and the level of funding overall. However, the potential benefits are such that London-wide action is required now.

For this reason, the following key actions are called for.

- Support the education system in increasing the amount of time spent on cooking and food education in schools, which may include work to revise the National Curriculum as well as specific support measures for individual schools and teachers.
- Research and promote the positive benefits of nutritious food for children.
- Improve the nutritional quality of school meals and the number of pupils eating them, targeting barriers such as training for catering staff, catering facilities, political will and overall budget allocations.
- Improve children's access to healthy, quality food outside of school meals: by improving the provision of fresh fruit and access to fresh water in schools; support & piloting the introduction of green/healthy vending machines; and establishing/expanding school breakfast clubs.
- Increase in the number of schools taking part in farm/city farm visits.

There is already considerable momentum behind these issues – at both a national level and within London - that this strategy needs to capitalise and build on. For example, in London much good work has been done already in Croydon, Greenwich and Camden. At national level, DoH and DfES have been working together on a Food in Schools programme that aims to help schools implement this whole school approach to food education and healthy eating.

The GLA needs to work with all of the London Boroughs and the DoH and the DfES, as well as with organizations such as the Caroline Walker Trust²⁰⁷ and the Soil Association, to ensure that London builds on the existing work and leads the UK on improving school meals and in achieving the Public Service Agreement target to halt the year-on-year rise in obesity among children under 11 by 2010.

CASE STUDIES

South Gloucestershire Council – improving school meals

In 2001, South Gloucestershire Council made the decision to source as much locally produced food as possible in order to provide fresh healthy food for all its pupils and support local farmers as part of its council-wide sustainability policy. The council, with the help of a regional development agency grant, researched the options for sourcing food locally and set up a brokerage service. This facilitated links between producers and caterers to make sourcing and supplying local food easier. The school meals service has developed considerably over the last four years with meal uptake increasing from 23% to 42%. In addition to the school lunch service, many schools now offer a fruit tuck service, breakfast service, after-school service, salad bars, teachers' menus and a fruit and vegetable basket service to staff.

Rewards Points for healthy eating, Yorkshire & Humber

In 2002, Yorkshire and Humber Regional Development Agency began a scheme to encourage healthy eating in school canteens in three large secondary schools. "Reward" points are awarded when pupils make healthy food choices in the school canteen and can be redeemed against health neutral activities (such as cinema tickets) or healthy activities (such as swimming and ice skating). In addition, at the end of each term, the healthiest pupils are awarded prizes with the most successful students receiving a free annual leisure pass for the county. The scheme uses sophisticated smart card technology; and cards have the capacity to be used as a payment mechanism for school meals, monitor attendance, access library services, etc. This data can be passed to parents to monitor their children's food choices.

Cooking bus – cooking skills education

A lack of appropriate facilities many schools face problem in teaching cooking skills. For 42 weeks of the year the cooking bus travels around the country visiting schools, community centres, youth clubs and play schemes where its two teachers work with school staff to inspire children and highlight the importance of food education, while supporting the national curriculum and teachers' own work objectives. The Food Standards Agency Cooking Bus has been developed in partnership with the campaign Focus on Food giving priority to schools in low income areas. The Cooking Bus also always strives to buy food within a 30-mile radius of the school being visited and to make effective use of local produce.

Spitalfields City Farm – Farm & food educational visits

Spitalfields City Farm is one of 18 in London, situated in one of the most deprived, densely populated wards of Tower Hamlets. It provides a wide range of activities and opportunities to the local community and visiting groups including a wildlife garden, a young farmers club and local farm shop. Spread over 1.3 acres of land the farm keeps a selection of farm animals. Sited on a former railway goods depot, the farm was started in 1978 in response to local people's wishes to convert wasteland into allotments, having lost theirs to developers. Since then the farm has gathered momentum, achieving charitable status in 1980. Today the farm receives over 18,000 visitors a year and is a member of "Farms for Schools" passing the required standards in the provision of facilities and educational resources for farm visits.

6.5.6 Reducing Waste

The production of food-related waste has significant environmental, economic and health impacts. Food related waste includes two key elements: packaging waste and organic food waste.

Both of these elements require *different approaches* to tackle them. There is a need to consider both household and commercial waste streams and to adopt two key waste interventions: waste reduction/re-use (i.e. reducing the amount of waste produced in the first place or reusing goods in their current form); and recycling (i.e. the reprocessing of waste either into the same product or a different one) or composting.

For this reason, the following key actions are called for.

- Continue to expand and improve recycling services in London. The Mayor has already committed to promoting home and community composting and exceeding Government household waste targets through the Mayor's Municipal Waste Management Strategy.
- Establish kitchen waste collection schemes. This will require further work by the London Boroughs to engage households, expanding collection services and, crucially, installing the infrastructure required to support the processing of such waste.
- Undertake household food waste research on the attitudes, awareness and behaviours of Londoners, and explore the effectiveness of incentives;
- Encouraging composting and/or recycling collection opportunities for London's array of major food markets.
- Encourage the piloting of initiatives with major retailers in London to reduce packaging and, in particular, trial charging for plastic bags.

Significant progress on the issue of food-related waste has already been made through the Mayor's Municipal Waste Management Strategy. For example, Proposal 16 of the Strategy states that 'for organic waste not composted at home or in the community, the Mayor will request that waste authorities make the provision for collection from homes'. Proposal 25 of the Strategy also requires all waste collection authorities to prepare fully costed feasibility studies for the collection of separated kitchen waste and garden waste.

This Strategy now calls for a greater focus on the food elements of waste, building on the work undertaken to date by the GLA, the boroughs and London's community recycling groups. It is recommended that the issue is considered in the forthcoming review of the Mayor's Waste Strategy and development of a Wider Waste Strategy.

On the issue of food-packaging waste, the GLA should work together with and encourage the packaging industry, representative bodies (such as INCPEN), WRAP and retailers to make progress in progressively minimising the environmental impacts of packaging.

CASE STUDIES

Fairfield Material Management Smithfield Wholesale Market, Manchester

A commercial sized vertical composting system (VCU) for New Smithfield Market in Openshaw (East Manchester) diverts waste from 4 traders, taking in green waste from Manchester City Council and producing high quality compost that meets PAS100 standards. with a capacity to process 1200 tonnes of material (roughly about 500 tonnes of green waste and 700 tonnes of organic). The unit is located at the market removing the need to transport waste materials around Manchester. Locating the composting system on the market site also helped to develop understanding and support from market traders, customers and council workers. The compost produced is used to supply central parks in Manchester, householders and allotments.

East London Community Recycling Partnership – household kitchen/food waste

The East London Community Recycling Partnership delivers recycling and composting projects, primarily on estates in North East London. Particularly notable schemes include: a Food Waste Composting Scheme, funded by Hackney's Neighbourhood Renewal Unit, provides residents with 'Bokashi' buckets which store food waste hygienically prior to composting; and a trial of door-to-door collection of food waste in the Nightingale Estate, launched in January 2004 and anticipated to be expanded across 5,000 households.

Fare Share – redistribution of surplus food

FareShare is the national charity that redistributes quality surplus food from the food industry to organisations working with homeless and vulnerable people in community day centres and hostels. They currently have eight FareShare schemes operating in partnership with local charities across the UK, working in partnership with over 150 companies and 250 local charities to improve the health and well being of over 12,000 homeless and vulnerable people each year.

In 2004, FareShare distributed 1,800 tonnes of quality food which would normally go to landfill. This surplus food contributes to over 2.5 million meals for people in need.

6.6 Implementation

In common with several of the Mayor's strategies, implementation of the London Food Strategy will require action on a broad range of fronts, through partnership with many different organisations.

The Action Plan highlights the priorities that have emerged from a rigorous process of selection. It also proposes an initial distribution of responsibilities among a variety of organisations.

Three, closely linked organisations are presently charged with the overall responsibility for taking forward this strategy: the London Food Board, the Government Office for London, and the Food Strategy Unit at the London Development Agency.

In this section the strategy sets out:

- a summary of the next steps to be taken by the London Food Board and the Food Strategy Unit
- some of the key organisations cited in the Action Plan.

Next Steps

Beginning immediately, and therefore overlapping with the Public Consultation process and for revision in the light of that process, the expected sequence moving forward is as follows.

- a) Agree prioritised action areas.
- b) Engage with key partners re prioritised actions.
- c) Identify available resources for prioritised actions.
- d) Amend prioritised areas in the light of (a), (b) and (c).
- e) Develop Business Plan for London Food Strategy-specific expenditure.
- f) Develop appropriate monitoring and performance management mechanisms for the strategy (including indicators, working group structures, resource implications, feedback on barriers to progress etc).
- g) Develop and implement transparent governance mechanisms and strategy management.
- h) Review progress & revise Action Plan.

The implementation of the strategy will also require partners to work towards agreed targets. *Provisional* targets for the six priority action areas have been developed: they are not included in this document, but will be presented separately and considered as part of the overall consultation phase for the strategy.

Key Partners

All of the organisations represented on the London Food Board, and many organisations already involved in food-related projects around the capital, will have a role to play in the delivery and implementation of the Strategy.

The roles of private organisations, voluntary organisations and representative organisations will need carefully to be discussed and negotiated (through the governance and related channels mentioned above).

Within the public sector, the following organisations are of particular importance.

- **Defra/GoL** – responsible for the implementation of the national Sustainable Food and Farming Strategy, Defra/GoL will have a vital role to play in the implementation of the Strategy.
- **DfES** – given the importance the Strategy attaches to the status and role of food in schools and education, the role of the DfES is very important.
- **LDA** – the London Development Agency will, in the short term at least, be the principal source of dedicated funding for the implementation of the Strategy; and, through its wider functions (especially re Business Link), has an important implementation role.
- **TfL** – Transport for London will need particularly to be involved in the freight-related and distributional elements of the Strategy.
- **DoH/RPHG** – as it seeks to put the Choosing Health White Paper into effect, the Department of Health/Regional Public Health Group is a vital participant, which a range of valuable resources, skills and contacts.
- **GLA** – the Greater London Authority has at least four key functions with respect to the food strategy.
 - Political – The success of the Strategy will depend to a significant extent on the degree and kind of political support it is seen to have.
 - Communications – The GLA has a significant media capability, the deployment of which would be a vital component of the proposed communications campaign.
 - The London Plan – The food strategy has a number of potential implications for the Mayor’s principal statutory vehicle for managing the capital, which need to be fully evaluated, understood and enacted.
 - Several other Mayoral strategies – Most notably the Waste, Biodiversity and Cultural Strategies – have strong links to food issues, and productive synergies need to be capitalised upon. Relevant links need to be identified and then taken forward, as appropriate, including adoption in the relevant strategies when they are revised.
- **Local organisations, notably London Boroughs, PCTs and schools** – many of the actions proposed in this Strategy will need to operate at local level, and ensuring the sensitive and appropriate engagement of partners at local level will be vital to the success of the Strategy;
- **Expert organisations and NGOs** – the knowledge and expertise accumulated by organisations such as Sustain, the Soil Association and London Food Link needs to be captured and sustained going forward.

APPENDICES

Appendix I: Links to Mayoral Strategies

Catalogued here are the instances where specific policies or proposals within the Mayoral Strategies have a significant implication for or connection with the food sector in London. Direct extracts have been used as far as possible in order to ensure that there is no misrepresentation of the original strategies.

London Spatial Development Strategy	
<i>Policy</i>	
2A.1	<p>Sustainability criteria</p> <p>The Mayor will use the following criteria in developing Sub-Regional Development Frameworks and when considering UDPs and planning applications referred to him.:</p> <ul style="list-style-type: none"> • Ensuring that development occurs in locations that are currently, or are planned to be, accessible by public transport, walking and cycling • Ensuring that development occurs in locations that are accessible to town centres, employment, housing, shops and services • Ensuring that development takes account of the capacity of existing or planned infrastructure including public transport, utilities and community infrastructure, such as schools and hospitals • Taking account of the impact that development will have on London’s natural resources, environmental and cultural assets and the health of local people • Taking account of the suitability of sites for mixed use development and the contribution that development might make to strengthening local communities <p>UDP policies should clarify that, when assessing the suitability of land for development, the nature of the development and its locational requirements should be taken into account, along with the above criteria.</p>
2A.4	<p>Areas for Regeneration</p> <p>In their UDPs, Community Strategies, and Neighbourhood Renewal Strategies, boroughs should identify Areas for Regeneration and set out integrated spatial policies that bring together regeneration, development and transport proposals with improvements in learning and skills, health, safety, access, employment, environment and housing.</p> <p>These policies and actions should state how they seek to achieve the government’s objective, which the Mayor supports, that no-one should be seriously disadvantaged by where they live within 10-20 years.</p>
2A.5	<p>Town centres</p> <p>The Mayor will work with sub-regional partnerships to implement a polycentric strategy for London’s development by promoting the strategic importance of London’s town centres in accommodating economic growth, meeting the needs of Londoners and improving the sustainability of London’s development. A robust strategy for town centres in each sub-</p>

	<p>region will be developed through the Sub-Regional Development Frameworks, taking into account the relationship with town centres in adjoining sub-regions and in the regions adjoining London, to provide strategic direction for the development of the network of centres.</p> <p>UDP policies should:</p> <ul style="list-style-type: none"> • have regard to the network of International, Metropolitan, Major and District centres • identify local centres • seek to exploit and enhance the accessibility of town centres from the areas which they serve, particularly by public transport, walking and cycling • provide for a full range of town centre functions including retail, leisure, employment services and community facilities, in line with other policies of this plan • seek to sustain and enhance the vitality and viability of town centres including maximising housing provision through high density, mixed-use development and environmental improvement.
2A.6	<p>Spatial strategy for suburbs</p> <p>UDP policies should contain spatial strategies for promoting change within, and enhancing the quality of life of, suburban London. Such strategies should:</p> <ul style="list-style-type: none"> • focus retail, leisure, key commercial activity and services in suburban metropolitan, major, district and local town centres. Where such centres do not already have good levels of public transport accessibility and capacity, improvements should be promoted • promote areas around suburban town centres that have good access by public transport and on foot to the town centre as appropriate for higher-density and mixed-use development including housing • improve the sustainability of suburban residential heartlands by promoting better access to centres, employment and community facilities, improving the public realm, making efficient use of space, and where appropriate, modernising or redeveloping the housing stock. <p>Such strategies should be developed with particular attention to the policies in this plan for town centres, employment, housing provision and design for a compact city.</p>
3A.20	<p>Health impacts</p> <p>Boroughs should have regard to the health impacts of development proposals as a mechanism for ensuring that major new developments promote public health within the borough.</p>
3A.25	<p>Social and economic impacts assessments</p> <p>Major developments in, or with the potential to impact on, Areas for Regeneration should be subject to social and economic impact assessments. These should consider the direct and indirect effects of a development on Areas for Regeneration, and be prepared by developers, in close collaboration with local community organisations and other local</p>

	<p>partners. Arrangements for fast-tracking such assessments should be put in place.</p> <p>Local neighbourhood needs, identified by local community organisations and other local partners, should be used as the basis for negotiating local community benefit from development, including Section 106 agreements.</p>
3A.26	<p>Supporting neighbourhood plans</p> <p>The Mayor will encourage communities and neighbourhood-based organisations to prepare planning frameworks or neighbourhood plans based upon identifying local economic, social, physical and environmental needs and opportunities to strengthen local Neighbourhood Renewal Strategies.</p>
3B.10	<p>Tourism industry</p> <p>The Mayor, working with strategic partners, will:</p> <ul style="list-style-type: none"> • develop his tourism strategy to enhance London's existing tourism offer and create integrated and sustainable new products and destinations especially outside the London core, to disperse tourism benefits to the town centres and suburbs • lead the development of key infrastructure projects and support major events bids to enhance London's image and economy • improve the tourist environment, visitor information and management to provide a better visitor experience and manage pressures on key tourist locations.
3C.1	<p>Integrating transport and development</p> <p>The Mayor will work with Transport for London, the Strategic Rail Authority, the government, boroughs and other partners to ensure the integration of transport and development by:</p> <ul style="list-style-type: none"> • encouraging patterns and forms of development that reduce the need to travel especially by car • seeking to improve public transport capacity and accessibility where it is needed, for areas of greatest demand and areas designated for development and regeneration, including the Thames Gateway, Central Activities Zone, Opportunities Areas, Areas for Intensification and town centres • in general, supporting high trip generating development only at locations with both high levels of public transport accessibility and capacity, sufficient to meet the transport requirements of the development. Parking provision should reflect levels of public transport accessibility.
3C.24	<p>Freight strategy</p> <p>The Mayor will promote the sustainable development of the full range of road, rail and water-borne freight facilities in London and seek to improve integration between the modes and between major rail interchanges and the centres they serve. The development of a London rail freight bypass</p>

	<p>route is supported.</p> <p>UDP policies should:</p> <ul style="list-style-type: none"> • implement the spatial aspects of the freight elements of the Mayor’s Transport Strategy as developed by the London Sustainable Distribution Partnership • seek to locate developments that generate high levels of freight movement close to major transport routes • ensure that suitable sites and facilities are made available to enable the transfer of freight by rail and water through the protection of existing sites and the provision of new sites • ensure developments include appropriate servicing facilities, off-road wherever practicable • ensure collection and delivery can take place off the main bus and tram routes
<p>3D.1</p>	<p>Supporting Town centres</p> <p>The Mayor will and boroughs should enhance access to goods and services and strengthen the wider role of town centres.</p> <p>UDP policies to:</p> <ul style="list-style-type: none"> • encourage retail, leisure and other related uses in town centres and discourage them outside the town centres • improve access to town centres by public transport, cycling and walking • enhance the quality of retail and other consumer services in town centres • support a wide role for town centres as locations for leisure and cultural activities, as well as business and housing • require the location of appropriate health, education and other public and community services in town centres • designate core areas primarily for shopping uses and secondary areas for shopping and other uses and set out policies for the appropriate management of both types of areas • undertake regular town centre health checks • support and encourage town centre management, partnerships and strategies including the introduction of Business Improvement Districts in appropriate locations.
<p>3D.3</p>	<p>Maintaining and improving retail facilities</p> <p>Boroughs should:</p> <ul style="list-style-type: none"> • work with retailers and others to prevent the loss of retail facilities that provide essential convenience and specialist shopping and to encourage mixed use development • establish local retailing information in collaboration with local communities and undertake audits of local retail and service facilities identifying areas considered deficient in convenience shopping and services • provide a policy framework for maintaining, managing and enhancing local and neighbourhood shopping facilities and where appropriate for

	<p>the provision of further such facilities in accessible locations</p> <ul style="list-style-type: none"> • support the development of e-tailing and encourage the widening of access to it.
3D.4	<p>Development and promotion of arts and culture</p> <p>The Mayor will work with strategic partnerships to promote culture in the framework of the Mayor's Cultural Strategy.</p> <p>UDP policies should:</p> <ul style="list-style-type: none"> • identify, protect and enhance Strategic Cultural Areas and their settings • designate and develop Cultural Quarters • where appropriate, support evening and night-time entertainment activities in central London, City fringe areas and town centres and where appropriate manage their impact through policies such as Entertainment Management Zones. <p>In considering proposals for cultural facilities, UDP policies should ensure that:</p> <ul style="list-style-type: none"> • a sequential approach is applied • sites have good access by public transport or improvements are planned • facilities are accessible to all sections of the community, including disabled people • new provision is focused on areas with deficiencies in facilities.
3D.14	<p>Agriculture in London</p> <p>The Mayor will and boroughs should seek to encourage and support a thriving agriculture sector in London. Policies in UDPs should provide for the protection of the best and most versatile agricultural land in accordance with national guidance, and allow for appropriate projects for farm diversification and other measures to meet the needs of farming and rural business development. Such policies should be consistent with the other policies of this plan, such as having regard to sustainable development and transport and the presumption against inappropriate development in the Green belt.</p>

London Economic Development Strategy

Policy

	<p>Deliver an improved and effective infrastructure to support London's future growth and development</p> <p>Possible actions:</p> <ul style="list-style-type: none"> • Make the economic, social and environmental case for investment in London's transport, communications and other infrastructure, and ensure delivery of projects critical to supporting London's growth • Maximise economic, social and environmental benefits from infrastructure and delivery.
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	<p>Deliver healthy, sustainable, high quality communities and urban environments.</p> <p>Possible actions:</p> <ul style="list-style-type: none"> • Support delivery of the Mayor’s environmental strategies • Support improvements in design and management of the public realm, addressing energy efficiency, heritage significance, noise, air quality, safety, health, climate change and biodiversity issues and achieving sustainable design and construction
	<p>Address barriers to enterprise start-up growth and competitiveness.</p> <p>Possible actions:</p> <ul style="list-style-type: none"> • Increase the supply of affordable and accessible workspace for SMEs • Improve access to enterprise start-up and growth finance • Simplify and improve the delivery and accessibility of customer-responsive enterprise support and advisory services across London • Ensure enterprise support services address barriers faced by particular client groups (including, BME and women-owned enterprises, voluntary and community sector organisations and social enterprises). Build the capacity of minority owned enterprise to bid for local government tenders • Raise awareness and take-up of in-work benefit schemes for those in self-employment.
	<p>Maintain London’s position as a key enterprise and trading location.</p> <p>Possible actions:</p> <ul style="list-style-type: none"> • Maintain London’s position as a key inward investment destination • Retain enterprises in London where economically efficient and feasible • Maximise trade potential for London firms.
	<p>Improve the skills of the workforce.</p> <p>Possible actions:</p> <ul style="list-style-type: none"> • Improve the standard and accessibility of training and enterprise support to meet the complex needs of the wider community • Support training for those returning to work and promote skills progression routes for those in employment • Ensure London enterprises are fully engaged in identifying skill needs and developing provision and initiatives to address them.
	<p>Maximise the productivity and innovation potential of London’s enterprises.</p>

	<p>Possible actions:</p> <ul style="list-style-type: none"> • Increase the take-up and pursuit of product, process and service innovations • Develop and deliver appropriate sector interventions that address recognised market failures • Promote effective collaboration between enterprise and Higher Education Institutions (HEIs) • Promote the business case for efficient use of resources, including energy, water and waste management, amongst London’s enterprise community.
	<p>Ensure a coherent approach to marketing and promoting London.</p> <p>Possible actions:</p> <ul style="list-style-type: none"> • Counter negative perceptions of London and develop shared marketing and promotional resources for London • Invest in and deliver new products to support effective international marketing and promotion • Strengthening and promote London’s role as a gateway to the rest of the UK • Ensure a strategic approach to marketing London • Market London as a prime destination to specific groups such as domestic and overseas students.
	<p>Coordinate effective marketing and promotion activities across London</p> <p>Possible actions:</p> <ul style="list-style-type: none"> • Support mechanisms which bring the activities of the private sector, London boroughs and others together.
	<p>Maintain and develop London as a top international destination and principal UK gateway for visitors, tourism and investment.</p> <p>Possible actions:</p> <ul style="list-style-type: none"> • Respond to and counter unexpected downturns in tourism an investment • Increase the appeal of less visited parts of London as a destination • Improve the quality and accessibility of London’s visitor accommodation • Develop London’s capacity to compete for enterprise and convention tourism and to host major events. • Build on London’s diversity and international strengths
	<p>Work in partnership to deliver this action plan.</p>

London Transport Strategy	
<i>Policy</i>	
4L.1	London's international transport links for passengers and freight should be improved and expanded, subject to environmental constraints.
4M.2	The Mayor will support the retention of freight interchange facilities on the Thames and other waterways.
<i>Proposal</i>	
3.2	Transport for London and the Greater London Authority will take the lead in ensuring that transport initiatives and plans will contribute to improving air quality including encourage business to reduce the emissions impacts and energy consumption of its transport activities.
3.4	Transport for London will contribute towards reducing traffic and transport noise.
3.6	<p>To reduce the impact of the transport of waste:</p> <ul style="list-style-type: none"> • Transport for London will work with the London boroughs, the Strategic Rail Authority and other relevant partners to encourage the movement of waste by rail and water, by for example ensuring that wharves and transfer stations that are, or could e reasonably made, viable for the movement of recyclable and residual waste and other materials are safeguarded • Where transport of waste by road is unavoidable, cost-effective measures to mitigate environmental and road traffic impacts will be encouraged through partnership and waste contracts.
4K.1	Transport for London will set up a London sustainable Distribution Partnership that will assist in the development and implementation of proposals for effective distribution of goods in London. (The Sustainable Distribution Partnership is to be established by the end of 2001.)
4K.2	Transport for London will encourage the early development of Freight Quality Partnerships, particularly at the sub-regional level, to complement similar, borough-led initiatives at the more local scale. (The initial partnerships should be set up in early 2002.)
4K.3	The London boroughs and Transport for London should review the London Lorry Ban's exempt network and access to it. They should also consider the wider strategic context of the Ban.

4K.4	<p>The Mayor’s Transport, Air Quality, Waste and Noise Strategies should form the basis of partnerships with business and major fleet operators, and the London boroughs and sub-regional partnerships to:</p> <ul style="list-style-type: none"> • Encourage the accelerated take-up of cleaner and quieter vehicle technologies • The achievement of quieter freight, distribution and waste operations and practices • The promotion of better vehicle maintenance, and considerate and economical driving.
4M.2	<p>Transport for London will work with relevant partners to identify options for increasing freight use of the River Thames and other waterways.</p>

The Mayor’s Municipal Waste Management Strategy

Policy

10	<p>The Mayor supports the reduction and reuse of waste, with an aim to decrease the amount of waste produced per household and slow the overall growth of waste.</p>
15	<p>Waste authorities should maximise waste composting where waste reduction and reuse are not possible, as a means to contributing to recycling and composting targets. A hierarchy of home composting, community composting, then centralised composting should be followed where practicable as part of Best Environmental Option (BPEO).</p>
16	<p>For organic waste not composted at home or in the community, the Mayor will request that waste authorities make appropriate provision for collections from home.</p>
17	<p>Where waste cannot be reused, recycled or composted, value should be recovered in the form of materials and energy. In the case of energy this should be done using a process that is eligible for Renewables Obligation Certificates, maximises the efficiency by using both the heat and the electrical power, and minimises emissions of pollutants to all media.</p>
18	<p>The Mayor will support proposals for the treatment of residual waste through new and emerging advanced conversion technologies for waste or new waste treatment methods.</p>

London Energy Strategy	
<i>Policy</i>	
1	The Mayor considers that London should take a proactive approach to ensure that it meets or exceeds its fair contribution to national targets for carbon dioxide emissions, renewable energy, combined heat and power and eradicating fuel poverty.
7	The Mayor supports the promotion of energy-efficient electrical appliances – including Government efforts to encourage manufacturers to develop more efficient products and retailers to promote energy-efficient products to consumers – and strongly encourages the use of efficient electrical appliances in London’s households and offices.
<i>Proposal</i>	
6	<p>London should generate at least 665GWh of electricity and 280GWh of heat, from up to 40,000 renewable energy schemes by 2010. This would generate enough power for the equivalent of more than 100,000 homes and heat for more than 10,000 homes.</p> <p>To help achieve this, London should install a range of sources of alternative energy sources including more anaerobic digestion plants with energy recovery and biomass-fuelled combined heat and power plants. London should then at least triple these and other appropriate technology capacities by 2020.</p>

London Noise Strategy	
<i>Policy</i>	
3	The Mayor will seek a partnership approach with the Government, the Highways Agency, Transport for London, and the London boroughs to better understand traffic noise exposure, and to integrate noise management in day-to-day operations, wherever cost-effective and compatible with safety and other needs.
13	The Mayor and Transport for London will work with the London Boroughs, business and freight, distributing and service industries, and others where relevant, to ensure the needs of business and Londoners for the movement of goods (including waste) and services are met, whilst minimising congestion and environmental impacts in accordance with the objectives of the Mayor’s Transport, Air Quality, Municipal Waste Management and Ambient Noise strategies.
49	The Mayor will urge the Government to work vigorously, including through international agreements, national and airport-related regulation and economic measures, to minimise the environmental impacts of air freight,

	including its overall implications for noise, and to promote effective and sustainable alternatives
76	<p>The Mayor will urge boroughs, in their Unitary Development Plans, or through other mechanisms, to indicate how potential conflicts between night noise generating and noise-sensitive uses, notably between late night entertainment housing, will be resolved, in terms of land use planning, building design, and management. Civic engagement and participation need to be reflected in alcohol and entertainments licensing as they are in planning. Issues include:</p> <ul style="list-style-type: none"> • Planning and design of late night eating, drinking and entertainment venues to prevent nuisance to established and prospective noise-sensitive uses, notable housing • Where appropriate, considering designation of suitable areas for late night facilities, and where necessary considering the designation of Entertainment Management Zones, in which planning, licensing, policing, transport and street management issues can be managed and co-ordinated • Planning and design of noise-sensitive uses, notably conversions to housing, to protect occupants from the reasonable operation of defined areas of late night activity, and established 24 hour facilities, especially where these are of importance to London’s world city role.
<i>Proposal</i>	
22	Transport for London will work with stakeholders to minimise the noise impacts of surface movements related to London area airports, including freight movements.

London Air Quality Strategy	
<i>Policy</i>	
11	The Mayor and Transport for London will work with others to ensure the needs of business and Londoners for the movement of goods and services are met, whilst minimising congestion and environmental impacts in accordance with the objectives of the Mayor’s Strategies.
<i>Proposal</i>	
10	The Mayor, in conjunction with the Association of London Government, the London boroughs and central government, will consider the London low emission zone feasibility study steering group’s recommendations. Prior to any decision on the implementation of a low emission zone, the Mayor will first take into account the views of those who are likely to be affected.
19	

	The Mayor, through Transport for London, will work with the London Sustainable Distribution Partnership to assist in the development and implementation of proposals for effective distribution of goods in London.
20	The Mayor, through Transport for London, has set up the London Sustainable Distribution Partnership to form the basis of partnerships with business, the London boroughs and other sub-regional partners. The Mayor’s proposals relating to freight from his transport, Air Quality, Municipal Waste Management, Ambient Noise and Energy Strategies will be considered through this partnership to encourage the accelerated take-up of cleaner and quieter vehicle technologies and to promote better vehicle maintenance and considerate and economical driving.
21	The Mayor, through Transport for London, will encourage the early development of Freight Quality Partnerships, particularly at the sub-regional level, to complement similar, borough-led initiatives at the more local level.
22	The Mayor, through Transport for London, together with the London boroughs, will assess the scope for the use of priority lanes by freight vehicles and its implications for other road users, primarily cyclists. The potential air quality benefits of the smoother driving and therefore lower emissions resulting from this measure will be investigated.

London Biodiversity Strategy	
<i>Policy</i>	
1	The Mayor will work with partners to protect, manage and enhance London’s Biodiversity.
4	The Mayor will promote the conservation and enhancement of London’s farmland biodiversity.
6	The Mayor will promote local opportunities for regular direct contact with the natural world, through a variety of types of open space (such as allotments, community and cultural gardens, school grounds, environmental education centres and city farms, as well as informal wildlife areas).
<i>Proposal</i>	
5	

	The Mayor will and boroughs should take account of the protection of wildlife habitats and biodiversity in the consideration of all planning applications.
30	The Mayor will work with the boroughs and others to encourage greater public use of allotments. He will promote the social, health and sustainability benefits of allotments and encourage London and borough Biodiversity Action Plans to address improvements to their wildlife value.
31	The Mayor will support and encourage the use of agri-environment and other schemes that enhance London's farmland biodiversity.
32	The Mayor will oppose commercial or experimental release of Genetically Modified Organisms (GMOs) into the environment in London.
41	The Mayor will work with partners with expertise in environmental education to improve the provision and secure the long-term future of environmental education centres, city farms, and community and cultural gardens throughout London, especially in those parts of London where the need is greatest.
42	The Mayor will continue his scheme to provide a free visit to London Zoo for all children in London schools. He will work with Government, London's education authorities, city farms and other environmental education initiatives to facilitate other opportunities for environmental education, especially at the local level.
46	The Mayor will work with the London borough councils, other landowners, and environmental organisations to promote an annual "London Wildlife Day" (or "week"), when land managers will be encouraged to organise events, and Londoners, including school groups, will be encouraged to visit and discover their local wild open spaces.
66	The Mayor will support appropriate funding bids from the Federation of City Farms and Community Gardens, environmental education centres and environmental outreach programmes in London to maintain and extend the provision city farms, community and cultural gardens and environmental education facilities in London, particularly in areas of greatest need.

London Cultural Strategy	
<i>Policy</i>	
1.2	Generate a strategic overview and proactive approach to the hosting and delivery of major cultural events in London – e.g. promote London’s current international festivals; support the London 2012 Olympic bid.
2.1	Develop a capacity building programme for London’s culturally diverse organisations and initiatives.
2.2	<p>Develop a programme of support for selective cultural events which reflect the diversity of London, e.g.</p> <ul style="list-style-type: none"> • consolidate Respect as a week-long annual major event • support the Irish community in building the St Patrick’s Parade to a scale comparable with New York’s parade • support the organisers of the Chinese New Year celebrations • promote and develop other London festivals, for example Thames Festival, Eid and Diwali etc.
3.2	<p>Champion the tourism industry, providing strategic leadership, bringing together the public and private sectors to maximise the benefits to London’s economy</p> <ul style="list-style-type: none"> • Deliver sustained marketing of the capital as a world class cultural destination to a domestic and overseas market, through the Totally London campaign, for example: • promote film as a tourism product • further develop the Mayor’s ‘Get Into London Theatre’ ticket promotion • promote London’s key cultural institutions • Ensure that culture is positioned centrally within the London ‘brand’, exploiting the full potential of its cultural and creative wealth.
7.1	<p>Promote the value of local cultural provision and its role in community empowerment including</p> <ul style="list-style-type: none"> • Identify opportunities for supporting and promoting the networks of local activity, community and street festivals • Promote London’s diverse cuisines: • as part of the city’s cultural events and activities • through linkages with the Mayor’s food strategy.
7.3	Promote the role and potential of culture in health

	<p>and community safety</p> <ul style="list-style-type: none"> • Promote cultural activity aimed at improving Londoners' health: • work with the London Health Commission to promote linkages between health and culture • develop a London evidence base for the health benefits of culture • identify opportunities to develop cultural projects which carry targeted health messages • work through the Greater London Alcohol and Drug Alliance to promote the use of culture and creativity to reduce crime, alcohol and drug misuse • support development of Sport England's promotion of community sport • Promote opportunities for vulnerable young people to participate in cultural activity: • encourage the regional cultural agencies to fund and support crime reduction projects • support the MPA in developing models of good practice linking culture and crime reduction.
9.1	Support the development of cultural quarters and promote their role in London's regeneration.
9.2	Promote the role of culture in neighbourhood renewal programmes and local strategic partnerships (e.g. support initiatives to develop 'local markets' for the creative industries through supporting, for example, street markets, open studios etc.)
10.1	Maximise the cultural opportunities of public spaces (e.g. promote temporary pedestrian zones linked to the provision of cultural events).

London Children and Young People's Strategy	
<i>Policy</i>	
5A.2	<p>The Mayor will continue to tackle existing inequalities in child health, and will seek improvements to children's health services in London.</p> <p>Action points:</p> <ul style="list-style-type: none"> • The London Health Commission will prioritise the needs of children and young people within its health inequalities programme and through the work of its Children and Young People's Health Forum • Through the Children and Young People's Health Forum, the Mayor will work with the London Boroughs to promote the implementation of the National Healthy Schools Scheme in all London schools • Through the final London Agenda for Action on Alcohol, the Mayor will work with relevant partners to reduce the level of harm caused to children by alcohol in London

Appendix II: Acronyms & Glossary

Acronyms

GLA – Greater London Authority
LFB – London Food Board
ARI – Allotment Regeneration Initiative
Soil Association
Defra – Department for Environment farming and rural affairs
SEEDA – South East England Development Agency
NFU – National Farmers Union
GoL – Government Office for London
LGA – Local Government Association
LB – London Boroughs
EHTS – Environmental Health and Trading Standards
LACORS – Local Authorities Coordinators of Regulatory Services
FSA – Food Standards Agency
GoSE – Government Office for the South East
CA – Countryside Agency
FFB – Food from Britain
LFL – London Food Link
FDF – Food and Drink Federation
DWP – Department for Work and Pensions
FCRN – Food Climate Research Network
CIEH – Chartered Institute of Environmental Health
BCC – British Chambers of Commerce
LSCs – Learning Skills Council
NTO – National Training Organisation
LTB – London Tourist Board
FCFCG - Federation of City Farms and Community Gardens

Glossary

Combined Heat and Power

Fuel efficient technology for producing electricity and heat together at point of use.

Connection (and reconnection)

It is argued (most notably in the national Strategy for Sustainable Farming and Food) that, on the one hand, consumers have become so used to food arriving in pre-packaged form that they no longer have a sense of the food's origin (as a crop or a creature); and, on the other, that farmers have become so used to a system of subsidies that they no longer have a sense of there being a 'customer' for their products. It is further argued that if these two ends of the food chain were more aware of each other, then the challenges facing the food system could be more easily addressed. This process of mutual awareness raising is referred to as 'reconnection'.

Common Agricultural Policy

Legislation and practices jointly adopted by the nations of the European Union (EU) in order to provide a common, unified policy framework for agriculture. Its stated purposes are to increase farm productivity, stabilize markets, ensure a fair

standard of living for farmers, guarantee regular supplies, and ensure reasonable prices for consumers. The CAP rests upon four basic principles: common import restrictions, common financing, common pricing, and common treatment of surpluses.

Ecological footprint

This is the land and water area, measured in global hectares, that is required to support indefinitely the material standard of living of a given human population. The food component accounts for all foods consumed inside and outside the home. The ecological footprint of harvesting, production and transport, as well as food wasted, its management and the benefits of composting.

Farm to fork

The term used to denote all of the stages of the food chain from production, processing, distribution and retail through to consumption and disposal.

Food desert

The term was first coined in 1996 by the Department of Health's Low Income Project Team as '*areas of relative exclusion where people experience physical and economic barriers to accessing healthy food*'. Research in this area is diffuse and a variety of methodologies have been used to measure and study food deserts producing inconclusive evidence of their nature and prevalence.

Food miles

An expression to capture the distance food has travelled from the place it was produced to where it is consumed.

Food poverty

The inability or uncertainty of acquiring an adequate quality or quantity of food in a socially acceptable way.

Food Safety

This traditionally involves incidence of food borne diseases but in its wider definition includes pollutants, such as heavy metals or pesticides, entering the food chain which threaten food safety. There are also issues of unfit food entering the food chain fraudulently, or animal waste being reprocessed into animal feed.

Food security

Food security is defined as a supply of the necessary quantity and quality of food with an acceptable degree of reliability at a reasonable cost. This involves safeguarding the supply of food against potential economic, social and environmental problems including climate change, terrorism, major incidents and catastrophes among others.

Foot and Mouth Disease

Foot-and-mouth disease is a severe, highly contagious viral disease of cloven-hoofed animals. The disease is characterized by fever and blister-like lesions followed by erosions on the tongue and lips, in the mouth, on the teats and between the hooves.

It causes severe losses in the production of meat and milk.

Genetically Modified (GM) Crops

Genetic Modification (GM) involves moving genetic material from the cells of one organism to those of another, be they related or unrelated. Genetically modified food crop means a food crop that consists of or includes plants that are genetically modified organisms; or that are derived or produced from genetically modified organisms.

Green belt

Established around major built-up areas to help protect the countryside, be it in agricultural, forestry or other uses and can assist in moving towards more sustainable patterns of urban development. They aim to check the unrestricted sprawl of large built up areas, prevent neighbouring towns from merging into one another, safeguard the countryside from encroachment and assist in urban regeneration, by encouraging the recycling of derelict and other urban land.

Local food

Broadly local food is that which has been produced, processed, traded and sold within a defined radius. There are no clear specifications on what this radius is and there are various additional criteria in use. The *National Association of Farmers' Markets (NAFM)* for example defines local as food that has been sourced from a radius within 50 miles of the market (30 miles is recommended). Whilst in London local is expanded to include producers within 100 miles of the M25.

National Service Frameworks

Guidance from the Government describing priorities for health and social services on joint action to improve and deliver services. They set national standards, programmes for implementation, and establish performance measures against which progress within an agreed time-scale is measured. National service frameworks are developed at the rate of two per year. So far, they cover coronary heart disease, cancer, older people, mental health, diabetes, paediatric intensive care and children's services

Public Service Agreements

These are the aims, objectives and performance targets for each of the main departments in Government and set down the key improvements needed to deliver better public services.

Regional food (sometimes called locality food)

Food produced within a particular geographical area (whether administrative region, county, town or other appellation) and is marketed as coming from that area. However, it may be sold within or outside that area. Regional food is perceived to have a distinctive quality because of the area in or the method by which it is produced.

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