Who feeds Bristol?

Towards a resilient food plan

Short summary

Research report written by Joy Carey

A baseline study of the food system that serves Bristol and the Bristol city region

March 2011

Introduction

For over a thousand years, the supply and trade of food has been integral to the economic and cultural life of Bristol. Yet during the 20th Century, the involvement of ordinary people with food has declined. Our system of farming, distribution, processing and retail has become highly mechanised, operating largely beyond public view.

Concerns about energy use, environmental integrity, and economic vulnerabilities mean that food is now moving back onto the political agenda – globally, nationally and locally.

We cannot begin to assess whether our own food system is healthy and robust unless we know more about it. For this reason, following on from Bristol's 'Peak Oil' report [1] the Bristol Green Capital Momentum Group identified the need to gather baseline information about the producers and businesses that put food onto our plates. The research was designed and conducted by Joy Carey, and was commissioned and supported by NHS Bristol and Bristol City Council.

The full 130 page report [2] contains a wealth of facts, figures and case studies relating to production, processing, distribution, catering, retail, community food growing, and waste. It includes an assessment of strengths, vulnerabilities and threats, and suggestions for action. The report is available, with the research appendices, at **www.bristol.gov.uk/whofeedsbristol**

This short summary document gives just a few brief highlights.

BRISTOL GREEN CAPITAL INSPIRING CHANGE

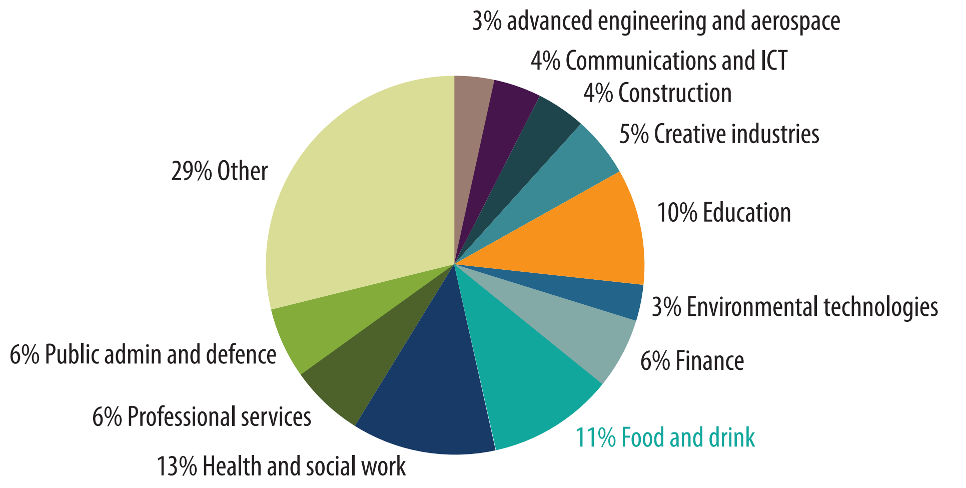
BRISTOL CITY COUNCIL

NHS Bristol

Sources:
1 Osborn, S. 'Building a positive future for Bristol after Peak Oil'. 2009. Bristol, Bristol Local Strategic Partnership. www.bristol.gov.uk/peakoil
2 Carey J. Who Feeds Bristol? Towards a resilient food plan. March 2011. Bristol Partnership.

Business and employment

Around one in every ten jobs in the West of England (Bath and NE Somerset, Bristol, North Somerset, South Gloucestershire) is related to food and drink. This means it is second only to Health and Social Care as a source of employment for local people (see Figure). Most of these jobs are in retail, catering and the hospitality sector.



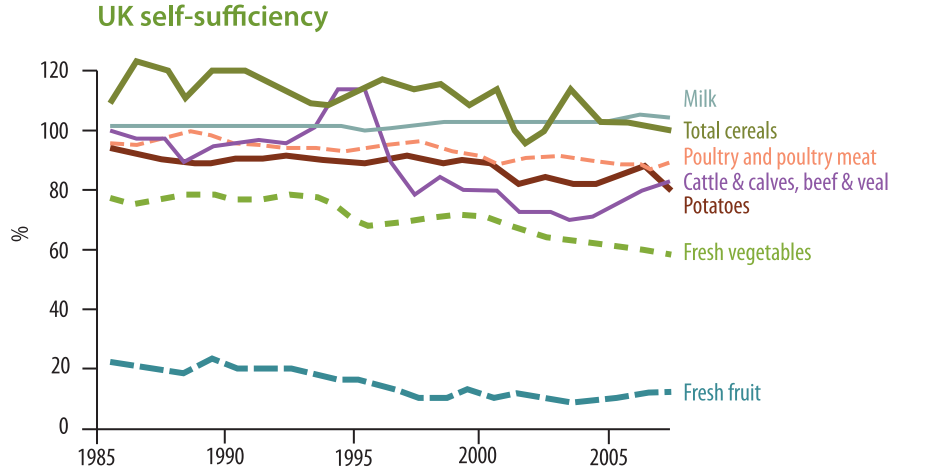
(**Data source:** *Dr. Stephen Usmar, Economic Development, Bristol City Council)*

Over 4,500 businesses in Bristol are registered with the Local Authority 'public food register', and of these some 3,000 are dealing with basic staple foods. Broadly the businesses split into;

- Catering 74%
- Retail 21%
- Processor/manufacturer 3%
- Wholesale/distribution 2%

Food Production

The UK imports 40% of its annual food requirements. The percentage of imports varies widely between food types, with 90% of fruit, and 60% of vegetables being imported. Alongside fruit and vegetables we import poultry, beef, cereals, and animal feed.



(**Data source:** *Food Matters; UK Cabinet Office, 2008)*

The South West is a major producer of livestock, accounting for 23% of England's cattle and sheep. It has some 5,500 dairy farms and produces 37% of England's milk, channelled through three large national dairy processors.

The South West has the greatest concentration of organic producers of anywhere in the UK, with 38% of England's organic producers, and 1.9 million hectares of organically farmed land (over 10% of the UK total).

Vegetable production in the South West makes up around 6% of Great Britain's production. The main crops are potatoes, cauliflower, swedes, brassicas, carrots, parsnips and celeriac [3]. There is some production of cider apples and soft fruit, but less than there was fifty years ago. The topography in much of the region restricts farm scale, and in some areas livestock production is the only feasible land use option. Because of this a network of large and small abattoirs has survived. The vegetable area in the SW has declined as the growth of multiple retail chains has driven need for consolidation. This has favoured the larger scale farm businesses in East Anglia, where packing capability is now concentrated.

Estimates for the area of agricultural land needed to feed a city range from 0.2 hectares to 0.5 hectares per person [4]. This means that land area needed for supplying staple foods for the City would extend well across the sub region and into Wales [5]. Allotments and city food growing could produce several thousand tonnes of produce, with cash value of several million pounds, in addition to the recreational and educational benefits.

Wholesale and distribution

There are 160 food distribution/wholesale facilities registered in the West of England. Major retail chains have their regional distribution centres close to the M4 and M5 motorways. Within Bristol, the distribution and wholesale facilities are clustered mainly in St Philips, and at Avonmouth/Royal Portbury.

Sources:

3 Liz Bowles English Food and Farming Partnership, (research for Who Feeds Bristol)

4 Fairlie S. Can Britain Feed Itself? The Land 4 Winter 2007-8 p18-26 http://transitionculture.org/wp-content/uploads/2007/CanBritain.pdf

5 Geofutures GIS tools. Food footprints: re-localising UK food supply July 2009 http://www.geofutures.com/2009/07/food-fooprints-re-localising-uk-food-supply/

The area served by the Wholesale Fruit (and vegetable) Centre in St Philips Bristol stretches from Fishguard to Portsmouth, and from Penzance to beyond Oxford. It serves virtually the entire independent greengrocery sector across the South West and South Wales and employs some 500 people locally.

Were it to collapse, this would lose significant local jobs and have a domino effect for thousands of producers, caterers and independent retailers throughout the South West and further afield. Without Bristol, the next closest markets are Western International Market just outside London near Heathrow, or Birmingham.

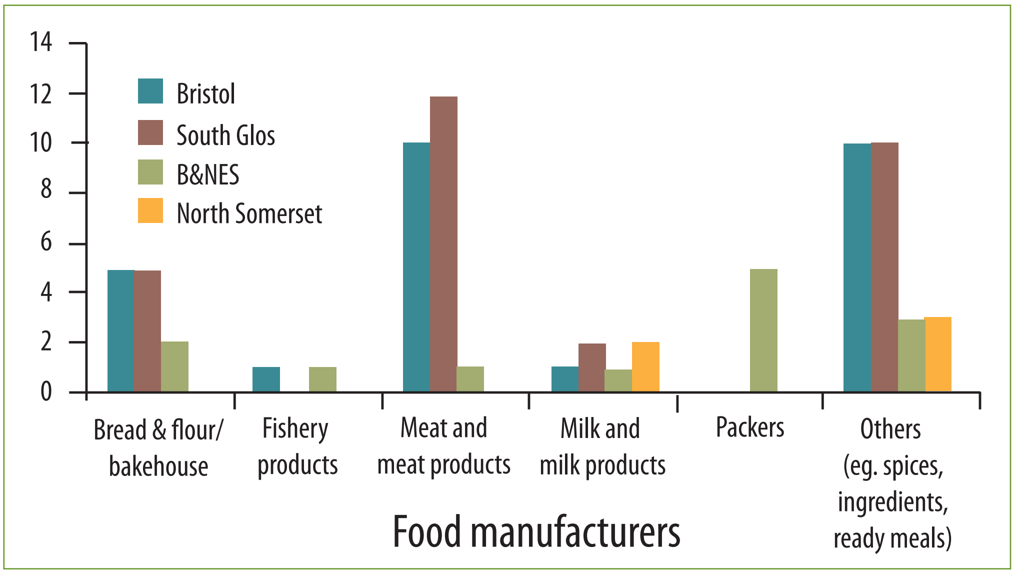
The market is under pressure because of the mode of operation of the retail multiples which control their whole supply chains 'in-house' and engage in practices criticised by the Competition Commission for their damage to market diversity, and distortion of competition [6]. Potential ways of maintaining a wholesale market for the independents are explored in the report.

Catering

Bristol's 2,000 catering businesses range from very large to very small, and include the many hundreds of restaurants, pubs and other businesses in Bristol's diverse 'eating out' sector. Many depend on the St Philips wholesale market for their fruit and vegetable supply. Case studies in the report highlight the valuable influence of the Soil Association's Food for Life Catering Mark.

Processing

Bristol is well served by a network of food processing and manufacturing businesses that play an essential role in our food system. In the meat trade, for example they make sausages and pies to ensure that nothing is wasted, and they supply to numerous 'eating-out' establishments and to smaller retailers.



Source:
6 Competition Commission October 2000. Supermarkets: A report on the supply of groceries from multiple stores in the United Kingdom. http://www.competition-commission.org.uk/rep_pub/reports/2000/446super.htm

Retail

The pattern of food shops in Bristol has changed significantly in recent decades. Some parts of Bristol still have high street food shops, and the Bristol Sweet Mart in Easton provides a positive case study, located in a busy, pedestrian-friendly area, and supplying local customers and over 100 restaurants and takeaways.

The overall trend is away from diversity and balanced competition to one of consolidation and monopoly. The past few years has seen phenomenal growth in the 'big four' multiple retail chains, of Tesco, Sainsbury's, Asda and Morrisons. In the early 1990s their combined share of the UK grocery market was 50% and by the end of 2009 it was 75.6%[7]. In 2004 within the West of England, the 'big four' owned 19 stores, and by 2010 this had risen to 76 [8]. There are approximately 180 independent food shops left in Bristol, owned by 140 businesses. In general it is the more deprived parts of the city that have the least choice of food shops. Views are divided on the merits of a total takeover by multiples, and in 2009 the UK Competition Commission urged the Government to introduce tighter planning rules, yet all the 'big four' continue to plan for strategic expansion.

Multiple chains tend to offer low prices on 'Known Value Items' such as milk and bread but prices for fresh vegetables, smaller packs, and items sold in their small local stores, can be more expensive than in independents. This has an impact particularly for elderly and vulnerable members of the community who may be more dependent on local shops. A pattern of shopping that suits the weekly trip by car may leave us stranded once we are old and frail and in need of good quality fresh food shops close by.

Bristol, in common with the rest of the UK, is seeing a consistent and serious rise in obesity. This is related to the food system both through car-dependency in the way we shop, and through the shift to heavy promotion and availability of calorie-dense foods [9].

Waste

Our current food system results in some 40% of food being wasted, either before being sold, or within households, restaurants and caterers.

In Bristol 9,000 tonnes of household food waste is currently collected and composted each year out of an estimated 20-25,000 tonnes of household food waste.

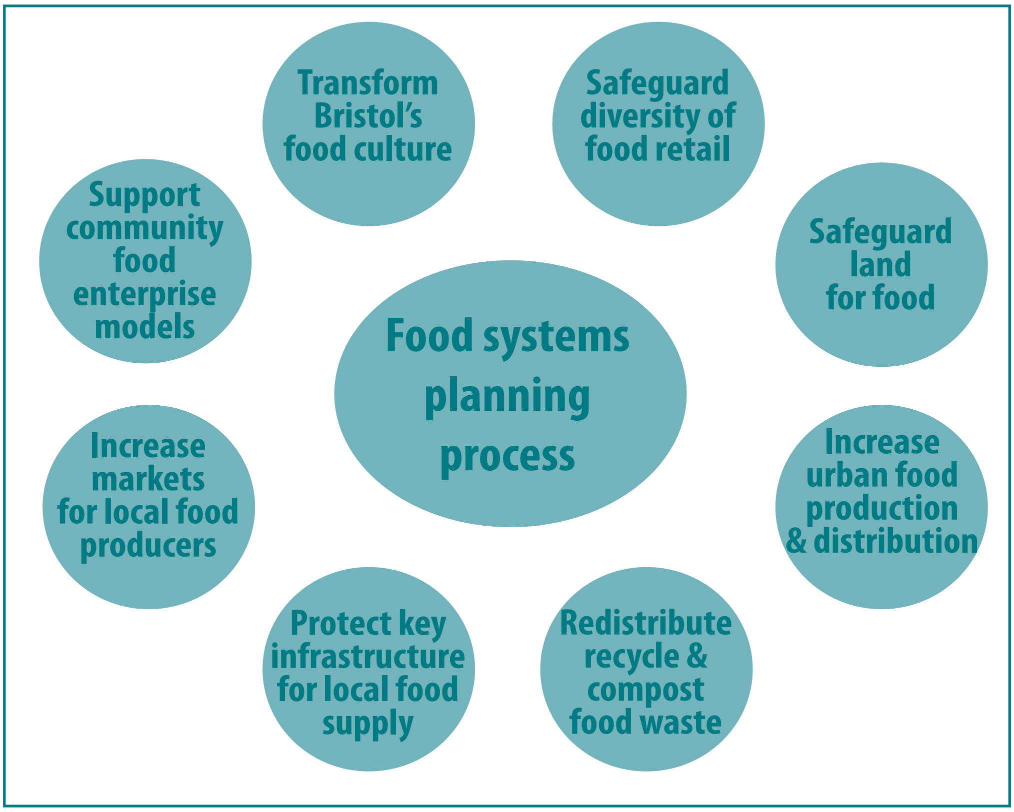
Sources:
7 Welch D. Endless choice or limitless damage? We name the greenest supermarkets. Ethical Consumer 128 Jan/Feb 2011
8 BBC Panorama, Growth of the Big Four, in graphics http://www.bbc.co.uk/news/uk-12007835
9 Kessler D. A, The end of overeating: taking control of our insatiable appetite. Penguin Books 2009. ISBN 978-0-141-04781-2

Are any changes needed?

The report shows that Bristol has a wealth of local producers, wholesalers, processors, caterers and shopkeepers, and there is a strong network of community groups, organisations, and businesses interested in good, sustainably produced food.

It also shows many opportunities for improvement. These relate to inefficiency of the food system in terms of energy use and carbon emissions, irreversible depletion of soil, water aquifers, biodiversity, mature rainforests, fossil fuels and essential minerals such as phosphates, and adverse impacts for health from poor quality food, and for the health and welfare of workers and animals. Fisheries are also at risk, although this has not been covered in the report.

It advocates an approach known as 'Food Systems Planning' in order to build a food culture for the city that has the health of people and planet at its heart.



The knowledge in the report, and what it tells us about actions needed, can now be used by everyone who cares about good food. Work has been progressing behind the scenes to establish Bristol's new Food Policy Council. This will be a small group of committed individuals with expertise and local experience relating to food production, preparation, distribution and retail. Under the chairmanship of Professor Kevin Morgan from Cardiff University, the Food Policy Council will help drive change. The aim is to make Bristol a city where eating and celebrating sustainably produced, healthy food becomes something that everyone is proud to be part of.

To keep informed about the huge range of grassroots projects, policy initiatives, events, and business development work going on across Bristol you can sign up for Bristol's 'Local Food Update' by visiting http://www.bristollocalfood.co.uk/