

SpinWatch

The 'Big Food' Takeover of British Agriculture



TESCO

AMERICAN STYLE

Salt beef



100g e

serving suggestion

AMERICAN STYLE BEEF FORMED FROM COOKED AND CURED BRISKET OF BEEF WITH NOT MORE THAN 15% ADDED WATER
INGREDIENTS: South American Beef (88%), Water, Salt, Dextrose, Glucose Syrup, Stabilisers (Sodium Triphosphate, Sodium Polyphosphate, Disodium Diphosphate), Antioxidant (Sodium Ascorbate), Preservative (Sodium Nitrate).

ALLERGEN INFORMATION
Produced in a Protective Atmosphere.
Produced in the U.K. for Tesco Stores Ltd., Cheshunt EN8 9SL, U.K. © Tesco '03 0433
KEEP REFRIGERATED. ONCE OPENED CONSUME WITHIN 2 DAYS AND BY USE BY DATE SHOWN
www.tesco.com

WARNING: This product may contain traces of nuts, as it has been made in a factory that uses nut ingredients.

NUTRITION INFORMATION

TYPICAL COMPOSITION	100g (3 1/2 oz) provide
Energy	454kJ/106kcal
Protein	19.9g
Carbohydrate of which sugars	0.7g 0.2g
Fat of which saturates	2.8g 1.1g
Fibre	0.3g
Sodium	0.7g

UK WZ004P EEC

Display until	Use by
07 FEB	08 FEB

Keep refrigerated



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By Andy Rowell

Glossary

BRC – British Retail Consortium
CIWF – Compassion in World Farming
Defra – Department for Environment, Food and Rural Affairs
EFFP - English Farming and Food Partnerships
EU - European Union
FOE - Friends of the Earth
FFA – Farmers For Action
FDF – Food and Drink Federation
FFB – Food From Britain
FMD – Foot and Mouth Disease
IGD - Institute of Grocery Distribution
MDC – Milk Development Council
MLC – Meat and Livestock Commission
NAFM – National Association of Farmers Markets
NFWI – National Federation of Women’s Institutes
NFU – National Farmers’ Union
NSPCC – National Society for the Prevention of Cruelty to Children
OFT – Office of Fair Trading
RSPB – Royal Society for the Protection of Birds
SWLFP - South West Local Food Partnership
SWFD - South West Food and Drink
SWRDA – South West Rural Development Agency
WTO – World Trade Organisation

Acknowledgements

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SpinWatch

The 'Big Food' Takeover of British Agriculture

1. Introduction

In October 2005, Sir Donald Curry, the man spear-heading the revival of British agriculture, addressed an industry conference talking about his favourite theme: reconnecting the British consumer with what they eat.

Surrounded by various supermarket executives, Curry said: 'Reconnecting the public with the food they eat and how it is produced is one of my key challenges for 2005 and beyond. It is essential that we have a better understanding of consumers' attitudes if we are to develop an effective communications strategy'.¹

For those who are concerned about the future of British agriculture, Curry has failed in his mission. Whilst he has consistently talked about the need for reconnection since his first report was published in 2002, the policies that he has encouraged have done the opposite. They have fed into the neo-liberal model of economic development – the need to be more internationally competitive, the need to pander to the supermarkets and other large multinational food businesses, that we have labelled 'big food' in this report.

The 'big food' model of development is neither economically or environmentally sustainable – it is not what consumers want either. Neither is the big food model the only way forward for agriculture. There is a whole array of alternative business models available for the government and Curry, namely the local food sector, where reconnection is guaranteed between farmer and consumer. However, at the October conference, key delegates kept muddying the waters between what is meant by local food and regional food. It all fits into a pattern of local food being undermined, whilst supermarket food is supported. Local food loses, big food wins.

The measures introduced by Curry have done precious little to address the underlying causes of the problems facing British agriculture. For example, the power of the 'big food' sector remains unchecked. Supermarket power, especially Tesco's, has never been stronger. Farm gate prices remain low. Farmers continue to leave the industry at an astonishing rate.

In fact Curry is one of a small band of elite who are all connected through different boards and committees, who control British agriculture. They continue to steer British agriculture on an unsustainable course. This elite contains the higher echelons of the NFU, an organisation that should be protecting British farmers, not undermining them. They are steering British agriculture in a direction that benefits the supermarkets at the expense of our farmers and small businesses. Big food wins as our farmers go bust.

Curry and his cabal are steering it in a direction that puts profit and the drive for international competitiveness above all else – forgetting the other values that were meant to be included in a Post-Curry world – reconnection, local food, sustainability, healthy eating, and a fair return for farmers. As big food wins, it is consumers who lose out. So what has gone wrong? Read this SpinWatch report into the crisis in the countryside.

2. A Good Old Curry

The Curry report was commissioned by the Labour government during the height of the foot and mouth (FMD) crisis in 2001. That Easter one million dead animals lay in the fields awaiting burial or burning. Lives and livelihoods had been destroyed. The Labour government was under severe pressure as the countryside boiled with anger. The press ran rampant with stories of farming in crisis with the government's incompetence to blame for the spread of the disease. Such was the political and economic fall-out, the government had to act and act fast.

Don Curry was an ideal candidate to lead an investigation into farming. He had been an integral part of the British farming establishment for years, with a long history with the Meat and Livestock Commission, a government quango, including being a MLC Commissioner in 1986, and Chair from 1994. The MLC's 'paramount duty is to promote greater efficiency in the livestock industry and the livestock products industry'.² Following its line of duty, the MLC was criticised during the BSE crisis for issuing 'statements which were not scientifically correct' and for falling 'short of the objectivity that should have been shown by a statutory body with a duty to have regard to the interests of the consumer'.³

It was part of this drive for efficiency and rationalisation that had led to the closure of many small and medium sized abattoirs under Curry's watch at the MLC. Here was a man who understood the need for an efficient farming and streamlined system that suited the supermarkets. Here was a man who understood the needs of the 'big food' system.

There are two other links of interest with Curry and the MLC. There has also been a close relationship between the MLC and Food From Britain, another quasi-governmental agency whose primary aim is to export as much food as possible from the UK. It is an organisation that would later benefit from the Curry Commission. Curry's predecessor as chairman of the MLC, Geoffrey John, moved to become chairman of Food From Britain in 1993⁴. Curry was appointed to the Council of Food From Britain for three years in 1994, staying for at least six years⁵. Here was a man who believed in the neo-liberal model of low cost competing internationally.

From the late nineties, Curry had been appointed as a director of NFU Mutual, the powerful insurance company that links into the NFU⁶. He is now the non-executive Chairman of the NFU Mutual Insurance Company. The link between NFU Mutual and the NFU runs deeply than many people think, with the two organisations closely intertwined. They even run joint companies together.

So Curry was not just a government-insider, he was an NFU insider, but he would lead an 'independent' commission. In August 2001, the 'Policy Commission On The Future Of Farming And Food' was announced, headed by Curry. It became known as the Curry Commission. It was meant to be the biggest revamp of agricultural policy since the War. The committee's remit was, in part, to 'advise the Government on how we can create a sustainable, competitive and diverse farming and food sector.'

The Commission identified that the 'key objective of public policy should be to reconnect our food and farming industry; to reconnect farming with its market and the rest of the food

chain; to reconnect the food chain and the countryside; and to reconnect consumers with what they eat and how it is produced.’

‘In our vision of the future’ the Commission continued, ‘farmers continue to receive payment from the public purse, but only for public benefits that the public wants and needs. They are technically efficient and run profitable businesses. Through co-operation and collaboration they have invested beyond the farm gate, and they receive a fair return for the food they produce.’

When the report was published to a fan-fare of publicity in January 2002 with over 100 recommendations the central theme of the report reflected the objectives of the Commission: reconnection. Reconnecting farmers with their market and the rest of the food chain; Reconnecting the food chain with a healthy and attractive countryside; Reconnecting consumers with what they eat and where it has come from.⁷

It was welcomed by many in the local food movement that finally thought here was a report that talked about many of the issues local food groups had long espoused. It also raised the idea of an alternative to the big food and supermarket system. ‘The immediate aftermath of FMD and Curry report did raise the awareness of local food as being a significant alternative strategy for the whole food system in the UK,’ argues Charles Couzens, a leading local food expert. But did this last?

The job of implementing Curry’s recommendations – called the Implementation Group was also given to an organisation that was headed by Curry. ‘I am very glad that Don Curry himself agreed to chair this group of distinguished outsiders,’ wrote Tony Blair. Also in response, in the 2002 Spending Review, the government promised ‘investment totalling over £500 million over three years will be available to support the key recommendations of the Policy Commission chaired by Sir Don Curry, and to improve animal health and welfare.’⁸

Since then millions has been poured into British agriculture. But why nearly four years later is Curry still talking about the need for reconnection? And what about a fair return for farmers, a central theme of the Curry Commission?

3. What Has Happened Since Curry?

3.1 Supermarkets Have Got Stronger

For farmers the situation of supermarket power has passed being critical. The profits of the big five supermarkets have risen 300 per cent in the past 15 years⁹. In the past three years, British supermarkets have got larger and stronger, especially the industry leader Tesco, which now takes one out of every seven and a half pounds spent with British retailers. In 2004, the company had over 28 per cent of the groceries market, which was up from 26.5 per cent the year before.¹⁰ In 2005, the figure had risen to over 30 per cent.¹¹ Some predict it will soon be 40 per cent and growing. Tesco’s rivals believe the company could control 42 or 43 per cent within the next six years - and possibly up to 47 per cent. They are even talking about 50 per cent.¹² The company is now so big it is British agriculture’s biggest customer.

But has the Curry Commission resulted in tighter control of supermarkets? No. Since 2002 there has been a voluntary ‘Code of Practice on Supermarkets’ after the Competition

Commission concluded that the large supermarkets were operating ‘against the public interest’, whilst reducing the choice and quality of goods. The existence of supermarket buying power had ‘meant that the burden of cost increases in the supply chain has fallen disproportionately heavily on small suppliers such as farmers,’ they concluded¹³.

In light of this, the Curry Commission recommended that the Office of Fair Trading (OFT) ‘should undertake a full formal review of the workings of the new code two years after its introduction.’¹⁴ The Government in turn committed the OFT to preparing an annual report on how the Code was working. The first such report by the OFT was published in February 2004. Its findings were staggering, concluding that ‘80 to 85 per cent of respondents claim the Code has failed to bring about any change in the supermarkets’ behaviour’. Because of this the OFT commissioned ‘further work to establish how supermarkets deal with suppliers under the Code’.¹⁵ This was undertaken in the form of an audit.

Such is the concern about the strength of the supermarkets that there is an alliance of 14 farming, environmental and consumer organisations calling for stricter controls over the supermarkets’ trading practices, particularly to stop them passing on unreasonable costs to farmers and growers in the UK and overseas. The Breaking the Armlock Alliance, as it is called, is demanding that the Government strengthen the Code of Practice on Supermarkets drawn up by the Competition Commission.¹⁶ One of the leading groups is Friends of the Earth who were outraged by the OFT’s review.

‘There wasn’t a need for an audit’ argues Sandra Bell from FoE. ‘They should have gone from the original conclusion in the review that it was not working to take action. There was enough evidence to tighten up the code and to make it statutory. This further investigation just seems to be a delaying tactic to prevent any action taking place’.

Furthermore there have been two major growth factors over the last three years that the OFT has failed to act on and were not in the original code. The growth of the major retailers in to non-food and the movement into the ‘convenience sector’ was not covered either, despite this happening at an alarming rate. Since Curry £1.25 billion has been spent on acquisitions of convenience stores by the big multiples,¹⁷ leading the Managing Director of Spar UK to warn that customer choice will be seriously eroded unless there is government intervention. In 2005, Tesco alone added 60 new convenience stores.

But Tesco is not content with just selling food. It is also moving heavily into non-food items, consolidating its vice-like grip on the British retail market. In the first half of 2005, Tesco’s non-food sales climbed 13% to £2.8bn. It is now one of the top three sellers of music, films and electronic games in the UK. It sells more beauty products than Boots and signs up 90,000 new banking customers a month.¹⁸ It has over 200 pharmacies. In September 2005 it opened its first completely non-food store in Manchester, called Tesco Homeplus.¹⁹ More will follow.

These trends have led to a chorus of voices speaking out. In October 2004, the Co-Op’s chief general manager for strategy, John Bowes, called for a review of the grocery market following the wave of consolidations. ‘Isn’t there something dishonest about our retailing industry pledging support for the British farming industry whilst seeking the lowest-cost global supply from internet auctions?’ he asked.²⁰ The same month the independent sector

asked the OFT to block the large supermarkets from being able to take over any smaller convenience stores.²¹

November 2004 saw the OFT's position being attacked by small retailers. 'It is farcical that an organisation set up to represent consumers is supporting the concept of superstore domination of the market', said that Federation of Wholesale Distributors.²² That same month the OFT was asked to open up a new investigation into the supermarket dominance by groups such as Friends of the Earth (FoE), Association of Convenience Stores, National Federation of Women's Institute's and Farm. Sandra Bell from FoE warned that the 'domination of the grocery market by the biggest supermarkets has been allowed to increase unchecked since the last investigation over four years ago'. Barbara Gill, the NFWI chair added that 'unfair practices of the biggest supermarkets were continuing unabated to the detriment of farmers and consumers'.²³

Ironically, even the large supermarkets themselves now complain about Tesco. Wal-Mart, the world's biggest retailer that is under fire in the US for pricing its competitors out of business, has become so concerned about Tesco's size and power in the UK, that it has asked the government to intervene. 'As you get over 30% and higher I am sure there is a point where government is compelled to intervene, particularly in the UK, where you have the planning laws that make it difficult to compete', Lee Scott, Wal-Mart's President said in August 2005. 'At some point the government has to look at it.'²⁴ The new chairman of J Sainsbury, Philip Hampton, has also lobbied the OFT to stop Tesco's growing domination of the grocery market.²⁵

Also in August 2005, the OFT concluded that the 'Supermarkets Code of Practice should remain unchanged but be used more effectively. Consumers are benefiting from competition in grocery retailing, and evidence has not come forward that the code is being breached.'²⁶ The decision was widely criticised. Many argued that suppliers were too frightened to contact the OFT, because they would be blacklisted by the supermarkets.²⁷ Blacklisting is where supermarkets refuse to use certain suppliers – so if you complain about their power, the supermarkets blacklist you, leaving a conspiracy of silence.

Ian Calderbank, a farmer from Essex, expressed the frustration felt by many. 'We will be forced to rely on dubious imports with environmentally damaging production methods and food miles, at prices that may well reflect the unstable nature of the world. As for consumer choice, what choice?'²⁸ In light of the decision, the NFU said it would push ahead with its 'Buyer's Charter',²⁹ (see below) however it immediately ran into trouble when Tesco refused to commit to the initiative, leaving the policy essentially in tatters.³⁰

In October 2005, there was a significant break-through when the OFT admitted that 'it did not properly carry out the review of the supermarkets sector' sought by Association of Convenience Stores, the Women's Institute and Friends of the Earth and others.³¹ The following month, the former boss of the OFT called for a new investigation into supermarket power. John Bridgeman, who had headed the original Competition Commission inquiry in 2000 that actually cleared the supermarkets of abusing their market position, said the market had changed so much since then that a further inquiry was justified. He specifically expressed concern that Tesco had been allowed to enter the convenience and corner shop market.³²

The OFT is now considering whether to refer supermarkets to the Competition Commission early next year.³³ Although the OFT may look, few believe it will actually act with enough regulatory vigour to stop Tesco's relentless expansion. Therefore there is no stopping the Tesco juggernaut. We will soon live in Tescoland.

3.2 Greater Supermarket Power = Greater Downward Pressure on Prices = Farmers are Forced Out of Business

Why should you care about how large Tesco's market share is? Simply, the greater the share the more power that it can use to squeeze suppliers and farmers. This consolidation of power is rightly worrying rank and file farmers across the land. A series of leaked NFU documents, obtained exclusively by SpinWatch, shows just how worried farmers are. The first document is a NFU Information and Analysis one. It notes that supermarket 'consolidation in recent years combined with the growth in market share by the major supermarkets is a cause for concern amongst many of the NFU's members. There is the belief that there is now an imbalance of power in the supply chain and this power is being abused.'³⁴

The supermarkets can abuse their buying power to exert a determined down-wards pressure on prices that is passed on to farmers. The second leaked NFU document shows that it is 'inevitable that downward price pressure at retail level will feed through eventually to downward pressure at farmgate level.'³⁵

This is happening and expected to get worse. The third document from 2005 notes: 'The dramatic changes in the food chain, which have taken place in the past year particularly in terms of consolidation and unrelenting price pressure, are set to continue if not intensify in 2006.'³⁶

No where has the downward price pressure been more intense than with the dairy industry. As Tesco makes nearly £40 million a week in profit, sixty per cent of dairy farmers do not even make a profit.³⁷ As a result seven dairy farmers a week go out of business.³⁸ The dairy industry is literally dying day by day. A report published by the Milk Development Council in August 2004 warned that 'over the past ten years farmgate prices and farm margins have fallen, dairy processor margins have remained fairly constant, whilst retailer margins have increase across all products.'³⁹

Just under a year later there was another devastating report into the state of the British dairy industry. Written by Professor David Colman from Manchester University, it examined the fortunes of 369 dairy farmers in England and Wales between April 03 and April 05. It came to some alarming conclusions:

- Over twelve per cent of dairy farmers had quit during the survey time period: nearly another ten per cent said they would be quitting within five years; with just under another ten percent being uncertain that they would remain in the industry.
- The Professor noted that 'not only did more farms cease production between April 2003 and April 2005 than had intended to do so in 2003, there was a higher concentration of more profitable and larger herds among those that quit.'

- Colman called the findings ‘disturbing’. He wrote that the ‘scale of the exodus suggests that there will be a more significant downturn in milk production in England’ although it would be slightly better in Wales. Still by 2007/8, there would be one billion litre short-fall in milk production. ‘In terms of three scenarios published earlier this year, it seems likely that the most pessimistic of the three will prevail. That is that total UK output will fall to around 13.3 billion litres in 2007/8, as against a national quota at that time of 14.41 billion.’⁴⁰

Two months after Colman’s report was published, the Scottish National Farmers’ Union warned that the dire situation in dairy farmer was not just south of the border. ‘Over the last six years, 1 in 4 Scottish dairy farmers have gone out of business,’ it said. The Scottish NFU warned that the ‘price war’ between supermarkets was ‘killing’ the Scottish dairy industry. The message to the supermarkets was stark: end the price war or face losing your supply base altogether.⁴¹

British farming continues to be in a state of crisis across all sectors. Nearly 20,000 agricultural jobs were lost in 2002, the year the Curry Commission was published.⁴² Total income from farming fell in 2003 by 2.6 per cent in real terms compared to 2003 – average farm incomes are now £16,000.⁴³ The following year, 2004, total farm income fell 5.4% to £3bn.⁴⁴ Farm debt is at record levels – standing at some £8.5 billion.⁴⁵

The pig industry is also in trouble with 36 per cent less pigs being reared in the UK in 2004, compared to twenty years earlier. British pig farmer’s cannot compete with cheaper imports. Nor can British beef farmers. The whole industry remains in crisis. Figures released in November 2005 by Deloitte showed that farming incomes were down a fifth since last year, with farmers making a loss on each acre farmed. ‘The actual business of producing food is expected to generate an average loss next year of £35 per acre’, reported the BBC’s rural affairs correspondent Tom Heap.⁴⁶

It is not surprising that farmers across the land are angry. ‘I have to admit to being made angry by the system which we are part of’ says John Thorley, the head of the 25,000 strong National Sheep Association. ‘Angry that the Tesco’s of this world can turn in a massive profit, maintain the forecast that prices will continue to fall to consumers, but fail to inform anyone that lower prices to consumers and higher profits for the company are only likely to be achieved by paying less money to the primary producer’. Others are worried too: ‘We remain deeply concerned that inequality of profit shares within the food chain is worsening’, adds Mark Hudson, from the Country Land and Business Association.⁴⁷

George Dunn from the Tenants Farmers Association reiterates an industry-wide concern since Curry: ‘What I think is very sad is that the enthusiasm and forward thinking aspects of Curry have not been taken forward in any real way. The principle driver that Curry saw for the rejuvenation of British agriculture was reconnection of farmers with consumers and we have seen precious little of that at the beginning of Curry process. There has been a lot of emphasis on the food chain, but it appears to stop about the supermarket point and doesn’t engage with consumers.’

3.3 Food Imports Have Increased

As our farmers go to the wall, food imports have increased by over 25 per cent since the early nineties according to the Office of National Statistics. Imports of beef were higher in 2004 than 2003 with imports of pork and lamb 'significantly higher'.⁴⁸ Exports of Brazilian beef to the UK were nearly 70 per cent higher in the first half of 2005, compared to the previous year.⁴⁹ However, in October 2005, British authorities announced that imports of Brazilian beef were being banned from two regions of the country due to a Foot and Mouth outbreak. The National Beef Association, though, complained that the disease could still be introduced in vaccinated cattle.⁵⁰ Sources within the industry have told SpinWatch that once the crisis is over Tesco plans to import vastly more Brazilian beef to supply its main beef ranges, leaving British beef as a small-volume exclusive sideline.

The company is just continuing a trend that has been going on for years. In 2004, Defra had released figures showing that UK farmers' share of the retail value of a food basket fell by 28% between 1988 and 2003 from 47% to 34%.⁵¹ It is not as if we have not been warned. Peter Davis when still CEO of Sainsburys' warned of a 'massive escalation in the sourcing of overseas products and that there was a danger that the Curry reports recommendations would "founder on the altar of retail competition".'

Internal NFU bulletins warn that 'intense price competition among major supermarkets' will only intensify resulting in 'lower prices being paid' to suppliers. 'All major retailers are or have plans to source primary agricultural products from outside Europe.'⁵² Or outside the UK. In September 2004 Tesco announced it was buying 20% more Irish food and drink than two years ago for its UK stores.⁵³

The flood of imports has led some groups to speak out. 'It is impossible to import more beef without reducing quality and assurance standards,' argues the National Beef Association. The NFU has come to the supermarket's defence, telling people to stop attacking the supermarkets. 'You do not slag off your customer', replied the NFU's Robin Tapper.⁵⁴

At the industry conference in October 2005 that was addressed by Curry, new research that had been commissioned by him was published. Funded by Asda, Sainsburys, Tescos, Waitrose and the NFU, it had had been undertaken by the Institute of Grocery Distribution – the IGD – which is closely associated with the supermarkets. The research purported to show that 'Only 1 in 10 [customers] highlight country of origin as one of their five most important drivers of purchase ... In contrast, price, taste, sell-by-date, brand, health and appearance all feature heavily, and much more so than production related factors.' Over 50 per cent of consumers could not care where their food came from at all.⁵⁵

This is the kind of research that the supermarkets want: it was essentially saying that a whole host of factors was more important than whether the product was local or even British: it gives them a justifiable excuse to carry on sourcing from overseas. That will only be to the detriment of British farming. It is also the kind of research that, if true, shows that Curry has systematically failed over the last few years to reconnect British consumers with British farmers. If he had succeeded, British consumers would rank buying local food as one of their most important factors. They would care if their local farmer went bust or not.

So instead of getting better, by many important indicators, British agriculture is worse off today than it was four years ago. Everything has a knock-on effect: The more produce is flown in from overseas, the more the climate suffers, the more our farmers suffer, especially the smaller family farms. The fabric of rural life is worn away. The less self-sufficient we become.

It does not have to be this way. Tom Rigby a dairy farmer from Warrington who has watched the decimation of dairy farmers in his area, says simply: ‘The UK has fertile soil, a good climate, efficient farmers and 60 million customers on our doorstep so there is no reason we should be in such a crisis.’ So what has gone wrong and why has Curry failed?

4. Why Has Curry Failed?

4.1 Its Remit Was Flawed

Whilst some groups welcomed Curry’s conclusions, others argued that its original remit was flawed. Logic would have it that if the original remit was flawed then the solutions would be flawed too.

‘As a farmer and the head of a farming organisation, it is very hard to identify anything or anywhere where Curry has made a difference – it goes back to two reasons we criticised it in the first place,’ argues Michael Hart from the Small and Family Farms Alliance and a farmer from Cornwall. ‘First of all you have to realise that it is only England – it is really only an English document and does not take into account Wales, Scotland and Northern Ireland. Secondly it did not take into account the enlargement of the EU and the WTO – they were specifically precluded from its remit.’

‘It is impossible to see any tangible benefits,’ adds Hart, ‘that you can say yes it made a difference. It’s not going to help control the supermarkets and their power. It hasn’t put a penny more in farmers’ pockets. I don’t think it has actually achieved anything’.

Ken Martyn is a farmer from Gloucester who agrees with Hart: ‘It failed to address the unsustainable low farm-gate price .. It failed to address the problem caused by the supermarkets willingness to import from the cheapest source, while demanding ever increasing standards from the home producer.’⁵⁶

John Thorley from the National Sheep Association is also critical of Curry: ‘Curry did the industry a serious disservice. It didn’t home in on issues that really mattered. It was almost as if he was producing something that would satisfy the government. I think he has done that. I think the government is highly satisfied. But what it has done for the industry and the country – it has to be negative, because there was an opportunity to do something really good, instead it is an extension of fiddling whilst Rome burns.’

The bottom line is that you can’t reconnect with the consumer in a sustainable local way while at the same time being internationally competitive in a global playing field. You cannot protect farmers and small producers until you curb the power of the supermarkets and the flood of cheap imports. You cannot ask your own farms to join expensive “assurance schemes” when cheaper imported produce does not have to be assured.

Paul Sander Jackson who heads Somerset Food Links is a pioneer of local food. His organisation was set up in 1999 to help develop a thriving local trade in locally produced food throughout Somerset.⁵⁷

He argues it is very difficult to square the dual goals of international competitiveness and sustainable food production. ‘The government does not seem willing to curb the corporate stranglehold, certainly on the retail sector,’ he argues. ‘If they can’t regard Tesco having a 30% market share and then acquiring neighbourhood stores as something approaching a monopoly, then I think that is going to sign the death knell for small producers, for retail diversity and for sustainable farming and food.’

4.2 Big Remains Beautiful – the ‘Big Food’ Mentality Wins

Although supermarket control is devastating British agriculture, the cabal that controls British agriculture believes that supermarkets and agri-business are the way forward. That ‘big food’ represents the future. They believe putting profit and the drive for international competitiveness above all else – forgetting the other values that were meant to be included in a Post-Curry world – reconnection, local food, sustainability, healthy eating, and a fair return for farmers. It is the direction that got us into this mess into the first place. Many of the post-Curry new institutions that are directing British agriculture are implementing schemes that benefit supermarkets. They benefit ‘big food’ to the detriment of British farmers.

There are pro-big food organisations that have received significant funding from government. A recipient of over £2.3 million in tax-payers money has been the Food Chain Centre (FCC) that was launched to ‘help build more effective and efficient supply chains’.⁵⁸ It is housed in the Institute of Grocery Distribution, which is joined at the hip with the supermarkets. It represents the interests of big food. Asda, Sainsburys, and Tesco’s are all on IGD’s Board of Trustees. The current President of the IGD is David Reid, the non Executive Chairman of Tesco.⁵⁹

The Food Chain Centre has a Steering group that is stacked in favour of farming /food chain interests with only 2 out of the 13 members representing consumer groups. The current chair of the Food Chain Centre is none other than the IGD Chief Executive Joanne Denney-Finch.⁶⁰

If you look at the press releases the FCC has issued, they are predominantly about improving efficiency of the supply chain and benchmarking which are key concepts that help supermarkets reduce costs, they do not assist farmers become more sustainable. Carol Trewin is an award-winning journalist who also worked for Taste of the West, a regional food group in the Westcountry. ‘I feel the people who are going to benefit most from benchmarking are the supermarkets,’ she says.

The Food Chain Centre is a ‘co-founder’ of the Cereals Industry Forum. In September 2003, this Forum was awarded a major Government grant of £1.4m over three years to ‘improve efficiency and competitiveness in the grain chain’.⁶¹ Earlier in 2003 the Food Chain Centre was awarded £500,000 to look at improving the efficiency of the milk supply chain.⁶²

The partners in the milk supply project included the NFU, the Milk Development Council, the Dairy Industry Association, British Retail Consortium (BRC), and the Cardiff Business School. The Cardiff consultants are from the Lean Enterprise Research Centre, a centre for

excellence on 'lean' thinking, a set of ideas pioneered by Toyota to improved efficiency in producing cars. It has a vocabulary such as 'Muda' - an activity that creates waste or no value or 'Poka-yoke' - a mistake-proofing device. All these initiatives feed into the so-called 'efficient' big food system.

The key academic at the Lean Centre is David Simons who worked with Tesco on a five-year research programme that facilitated 'lean thinking' within the Supply Chain Development Group at Tesco, which aimed to achieve £100 million savings⁶³. Simon is also co-director of the Food Process Innovation Unit at Cardiff that works closely with another Curry initiative, called the Red Meat Industry Forum, which has received over £5.3 million to improve the competitiveness of the British Meat Industry.⁶⁴

In June 2004 a major new study by the Food Chain Centre and the Red Meat Industry Forum claimed to have discovered potential savings of up to 20% across the pork sausage supply chain. Participants included Tesco and their main suppliers, including pig farmer Jon Easy. The results were welcomed by Tesco and the Food Chain Centre but dismissed by the farmer who actually took part. 'I think it is unlikely that any of the potential savings discovered will flow back to farmers in future, unless there is a huge change in the whole industry,' Jon Easy said.⁶⁵ In October 2005, the Red Meat Industry Forum received a further 31.5 million from the government, as part of a £8 million package to try and revitalise the British beef sector.⁶⁶ But without the government tackling the growing imports of beef, the measures will be seen as too little too late.

Another post-Curry institution is called English Farming and Food Partnerships (EFFP), which has received over £3.41 Million from Defra. Its role is to 'strengthen profitability, competitiveness and sustainability of England's farming and food industry'. It does this by growing farmer-controlled businesses and developing co-operation not only between farmers but also between farmers and the rest of the food chain.⁶⁷

Once again the usual suspects control it. Its CEO is Sion Roberts, who is the ex-Chief Economist at the NFU. The chair of EFFP is Jeremy Pope who is a brewer and solicitor. He is the former Chief Executive of the family brewing company, Eldridge Pope, and now the Deputy Chair of the South West Regional Development Agency.⁶⁸

Insight can be gleaned from EFFP's direction when in April 2004, EFFP appointed two new board directors, including Chris Blundell from Morrisons. Just two weeks earlier, Blundell had been defending Morrison's price-cutting against farmers⁶⁹. Morrisons were also embroiled in a controversy in Shetland having cancelled the contract of a local fishmonger, Rita McNab, who had laid off two workers as a result. The move infuriated the local community and McNab's customers who 'continue to ask me why our fish is not being sold in the supermarket anymore'.⁷⁰ Elsewhere other consumers complained that 'since Morrisons took over Safeway I am finding it difficult to purchase UK grown vegetables. Most of the fresh vegetables are from all over the world apart from the UK'.⁷¹

EFFP's 'Associate Members' include some of the largest 'big food' companies in the country: 3663, ASDA, Dairy Crest, Grampian Country Food Group, McDonald's, Morrisons, Somerfield, Tesco, United Biscuits and Waitrose.⁷²

4.3 An Export Agency Promotes Local Food

The vehicle for funding the ‘regional food’ movement since Curry has been a publicly-funded consultancy called Food From Britain (FFB). Described as a “quasi-governmental agency”, essentially it is an export agency, whose clients have included: Ashbury Confectionery, Britain’s third largest confectionery, Britvic Fruitshoot, and Dormen Snack Foods.⁷³ How, critics argue, can an organisation designed to export reconnect British farmers with British consumers?

Look at their web-site and even under the regional foods head-line, the second link after ‘Events’ is ‘Guide to Exporting’, which states: ‘The Guide to Exporting for Regional Food & Drink Producers has been prepared by FFB as part of the Defra funded campaign to promote the UK’s regional food & drink industry’.

In 2002 the remuneration of Gordon Summerfield, the FFB Chairman was £47,423 per annum, for a two-day week. Summerfield is also a Director of Arla Foods, the UK’s leading dairy company. Arla UK is the sole British distributor of both Arla’s Lurpak brand and Anchor, which sells 61 million packs of New Zealand butter each year, which will directly compete with British butter manufacturers.

In a devastating critique of its operations, the Soil Association argued in 2003 that FFB had ‘failed’ to understand the objectives and nature of the local food sector, and was ‘actually undermining existing initiatives’ and ‘seriously failing’ it. FFB did ‘not seem to have an understanding of food quality’, and was acting as a ‘free marketing service for large food businesses’.

There was also a criticism that goes to the heart of the local food debate: FFB ‘seems to confuse the development of local food economies with the promotion of regional speciality food. Food links organisations are really trying hard on a micro-business scale – generating new business, start-up new food procurement operations, linking up to new initiatives such as Community supported agriculture; assisting low input and organic farming. The Food from Britain side is taking successful businesses on a regional or national scale. It gets away from food miles. It is about making existing business bigger. It misses the point’.⁷⁴

Others agree: ‘Perhaps the Curry report’s most fundamental flaw was the misinterpretation of the term “sustainability,”’ argues James Pavitt, the ex-coordinator of the National Association of Farmers Markets (NAFM). ‘Food From Britain are not about sustainability in the broader sense. FFB are about economic sustainability, certainly not social and definitely not environmental. For example, if you look at FFB’s objective for “regionality food marketing” there are no environmental or social benefits at all. You only get environmental and social benefits with truly local food, in my experience the more local the better’.

However Defra gave FFB an extra £3 million over three years to promote regional food, not local food-links initiatives. The person in charge of FFB’s regional food strategy is Jane Wakeling, who worked as a trader for Sainsburys for 18 years before joining Food From Britain. Wakeling maintains though that it is doing a good job and in its first year generated over £2.2 million in sales.

But the regional food groups have received a paltry £90,000 each and only £207,000 on Consumer Awareness. This is a tiny amount compared to the sums routinely spent by industry on brand promotion. For example, Danone spent £2 million promoting Activia yoghurt during its 2005 advertising campaign, and GlaxosmithKline spent £3 million on its drink Lucozade Energy in an Autumn 2004 ad campaign. Even Green and Black, the organic chocolate company, spent £1 million on advertising before Christmas in 2004.⁷⁵

FFB was also forced to defend its 'modest' financial contribution to British Food Fortnight, the nation's biggest food promotion event in the autumn of 2004, which was 'under threat' due to lack of funding. Its co-ordinator Alexia Robinson warned that 'British Food Fortnight is so under-funded it's a joke.'⁷⁶ The 2005 British Food Fortnight was instead primarily sponsored by Nationwide, the Department of Health and the supermarket chains Booths and Budgens.⁷⁷ In 2005 Tim Bennett, the NFU's President, joined FFB's Council, keeping the small cabal who control British agriculture intact.

4.4 Those who Control British Agriculture Believe in the Free Market/Globalised Economy.

In a post-Curry world you would think that the focus of any government organisation would be on the theme that Donald Curry flagged at the October 2005 IGD Conference: reconnection. Reconnecting consumers with farmers. This could be done by a whole plethora of means, including marketing, promotion and finance. But this is not always the case. The South West Regional Development Agency set up a 'one-stop' organisation to promote the region's food and drink sector in 2002 called South West Food and Drink (SWFD). The main focus of SWFD was to assist firms in the south west with 'marketing/distribution of products to their customers'.

Many people working in the sector attended a seminar run by South West Food and Drink in June 2004 in Exeter. A few eyebrows were raised by the joint sponsor of the conference, the Food and Drink Federation (FDF), the powerful big food lobby group. The seminar was called 'Identifying Opportunities for the South West Food and Drink Industry'. Speakers included Sylvia Jay, from the FDF and Jeremy Pope, who spoke about 'How Innovation is helping the South West Dairy Industry compete in a global marketplace'. Note 'compete in the global marketplace'.

Also speaking were Lord Haskins the 'advisor to the Government,' whose ex-company Northern Foods fought a battle to stop Melton Mowbray pies being given 'protected geographical indication status' by the EU. The status is a way for regional producers across Europe to protect their identity and a key way to promote regional food. Haskins himself has attacked the scheme.

Then came Paul Freeston the Chief Executive of Apetito on 'Apetito – A South West success story' – the keynote speaker. Apetito's UK subsidiary may be based in the South-West, but it is a part of the Apetito group, one of Europe's leading suppliers of frozen food and catering meals with its head office located in Germany. Its subsidiary is Wiltshire Farm Foods, a home delivery service. One delegate noted that 'When asked what percentage of ingredients used in "Wiltshire Farm" foods is actually sourced from the South West, Freeston was unable to supply a figure or even name a single supplier. 'We buy beef from South America and chicken from Thailand' he said, 'where the quality is very good'.⁷⁸

So is Wiltshire Farm food from a farm or even from Wiltshire? The company explains: ‘Wiltshire Farm Foods is a trademark of Apetito Ltd. The majority of our products are produced at our EU approved factory in Trowbridge, Wiltshire. A number of cold desserts are produced by other suppliers in the UK and Europe. We source our ingredients from a wide range of approved suppliers in the UK and world-wide’.⁷⁹

Is this the kind of business model that reconnects consumers with what they eat in a sustainable and local way, delegates were left pondering? Maybe they thought the connection could come from Richard Hunter – the managing Director of SWFD who told delegates about his success in marketing the ‘70 second’ burger as part of the Rustlers brand microwavable snack.

So here was public money sponsoring an event with a large trade federation that looks after the interests of the supermarkets and big food. But the concept of reconnection or healthy eating or local food was not on the table for discussion.

The conference was a perfect example of what is happening at a national scale. Those that control British agriculture see supermarkets and global sourcing as the way forward. The FDF, which co-sponsored the conference, calls itself the voice of the UK food and drink manufacturing industry⁸⁰. It represents the powerful companies who control what you eat and has been repeatedly criticised by consumer groups for various stances on food and farming issues, including obesity.

The FDF has been working with other supermarket lobby groups and the NFU on the Curry Commission. In 2001 Sylvia Jay conceded there was a forum ‘which brings together the Presidents and Directors General of the four key groupings along the food chain- Food Drink Federation, the NFU, the British Retail Consortium and the Institute of Grocery Distribution. This group has been meeting regularly since the spring and, for example, was able to agree a common stance on the Independent Commission on Food and Farming [Curry Commission].’⁸¹

Here was an admission that the NFU was working with the supermarket and big manufacturers on a ‘common stance’ on Curry. Former Safeway spin-doctor Kevin Hawkins heads the BRC, whose members are from the retail trade including the supermarkets⁸². They all see supermarkets as the solution to the crisis in British agriculture.

They have also worked closely to fight against government regulation on diet and obesity. The FDF is against a ban on advertising of junk food to children to fight obesity⁸³. The FDF and NFU were identified in May 2004 by *The Guardian* as being key players in a huge ‘lobbying campaign in Whitehall to see off growing pressure for regulation to tackle obesity and diet-related diseases’. According to leaked documents Sylvia Jay from the FDF went to see the Public Health Minister, Melanie Johnson. ‘Minutes of the meeting show that the FDF took the opportunity to tell the minister that the industry would oppose any proposals to reduce fat and sugar in foods along the lines of the work being done to reduce salt’, recorded *The Guardian*.⁸⁴

The close collaboration between the organisations continues. Look at a copy of the NFU’s 2004 Annual Review and Sylvia Jay, from the FDF and Kevin Hawkins from the BRC are there. ‘Our fortunes are directly linked with those of UK farmers’, says Jay. ‘The very idea of

a partnership between the national farmers' organisation and the leading retailers trade association may strike some farmers as a contradiction in terms', writes Hawkins⁸⁵. Ironically many farmers would agree.

4.5 Attempts to 'Reconnect Farmers' Have Been Thwarted

In an ideal world, those people working independently to support British agriculture would be supported by those at the top of British agriculture. However, there is evidence that attempts to undertake marketing campaigns to promote British agriculture to consumers have been stymied by the NFU and its close associates.

The first comes from Michael Hart, from the Small and Family Farms Alliance, who ran a roadshow in the late nineties. Hart argues that it was only because of his efforts that the NFU decided to undertake a farming road-show nationally. Even then: 'It wasn't about promoting agriculture it was more about promoting the NFU to its members – it also had Sainsburys' written all over it'. The NFU also took control.

Another person who the NFU have shunned is marketing specialist Alison Fogg, who has tried unsuccessfully for three years to launch a major marketing campaign to promote British produce to the British consumer and counter the £200 million a year that supermarkets spend advertising their own brands. Her vision was to build a communications strategy, just like Curry talked about at the October 2005 IGD conference. Only her idea had been born three years before. Fogg is not light-weight, either. Her track-record included working with the Banks: Barclays; Nat West, Commercial Union; working with NGOs such as Oxfam; Shelter; RSPB and NSPCC; working with giants like BT, and Orange as well as the supermarkets: Sainsburys, Tesco, Waitrose and M&S.

Having set up a company called British Agriculture Marketing with Northumberland farmer, John Cresswell, the idea for a consumer based marketing magazine gained support from leading farming organisations, leading organic company Yeo Valley, and regional food groups. 'In essence the idea was to educate or encourage British consumers to value British produce over foreign produce', says Cresswell.

In January 2003, Fogg had a meeting with Donald Curry to try and get his approval. 'We presented all our communications ideas and strategy. Curry referred us back to the NFU'. She met him again at the Royal Show in 2003. 'He only pointed us back to the NFU or Red Tractor'. The NFU refused to help. They tried others that have benefited from Curry's reforms asking them for money. All refused. So did the supermarkets.

'Every avenue I went down seemed to be blocked', says Fogg. 'What makes me angry is that the industry players who are purporting to support the farmers are not'. Shunned by the NFU, Fogg was eventually commissioned to write a marketing strategy for the Tenants Farmers Association and National Beef Association. Her 150 page report was published in January 2005.⁸⁶ But was this marketing specialist invited by Sir Don Curry to the IGD's October conference, where he argued that a marketing and communications strategy was important? Of course not.

John Cresswell is also bitter at the experience: 'There is a cabal, I think between NFU, supermarkets and government and the academic / quasi academic people such as the Food

Chain Centre. Essentially what we hadn't understood is that we were rattling that industry. These guys don't want us to build a relationship with British consumers – it is contrary to their interests. I had been a naive enough to think that there was some common ground'.

4.6 A Flawed Response To the Consumer - The Little Red Tractor

Another key element of the NFU's marketing strategy includes the promotion of the Little Red Tractor – the British Assurance mark. A recommendation of the Curry Commission, it was launched by the government in June 2000. All the major supermarkets support it.⁸⁷

It is meant to unify all the different assurance schemes and help the British consumer choose a British product with a clean bill of health with a clear conscience. You may have seen the logo, but do you actually know what it means? Does it guarantee British produce? No. The Red Tractor is not 'an indication of the country of origin of the food or its ingredients',⁸⁸ it just guarantees produce that conforms to the British standard. So a supermarket can import produce and stick a red tractor logo on it. So far strawberries from Egypt, lettuce from Spain, chicken from Holland and legs of lamb from New Zealand have all shown the Red Tractor logo.⁸⁹

TV chef Antony Worrall-Thompson helped launch the logo but commented after a New Zealand leg of lamb was found at the Sainsbury stand at the Royal Show: 'I thought that I was supporting a great British product, but I'm not. It's very deceptive'.⁹⁰

Others agree: Norman Bagley from the Association of Independent Meat Suppliers says the logo 'has absolutely no credibility and only acts as a conduit for turning imported meat into so-called British product'⁹¹. Or it could be used to turn imported produce into convenience food. For example, the magazine *Farm Brief* noted: 'the latest import appearing on supermarket shelves is biscuits. Naturally, it qualifies for the famous Red Tractor Logo since it is imported into the UK in loose bulk form and packed in east London'.⁹²

Others question the logo further. Friends of the Earth argues that it does not 'provide any real assurance that the food is produced to any higher standard than other food ... it may even be produced to lower standards'.⁹³ The Soil Association maintains that changes to the guidelines means that chickens can 'receive daily doses of antibiotic growth promoters, which were previously not allowed under the scheme.'⁹⁴ Compassion in World Farming (CIWF) even run a website called 'Redtractortruth.org', that raises serious animal welfare issues such as up to 19 chickens allowed in a square metre⁹⁵. CIWF are really concerned that people will see the Red Tractor and think that the scheme promotes high welfare, but it does not.

Some farmers argue assurance schemes are an unnecessary burden that ultimately gives power to the people who own the logo, especially if subsidies are linked to them. Michael Hart from the Small and Family Farms Association says 'If you have to have farm assurance – the company that owns the farm assurance schemes are going to have control of that market'.

So who does own the Red Tractor? Log on to the littleredtractor.org and it says that 'it is run by an independent chairman and board of directors' and an independent body Assured Food Standards, that is 'owned by the food chain'.⁹⁶

But who registered the domain, <http://www.redtractor.org>? The NFU. Who owns the trademark for the British Farm Standard that includes the Red Tractor Logo? The NFU? Who appointed the licensing authority? The NFU.⁹⁷ Who applied for and was granted an updated trademark in May 2004 for the Red Tractor logo? The NFU.⁹⁸ This was months after all control of the Red Tractor was supposedly given to Assured Food Standards.

No wonder everyone is confused. Recent surveys have found that ‘More than half of young managers working in the grocery industry admit they do not know what the Little Red Tractor logo stands for’⁹⁹ and of the consumers who recognised the logo, only 2% knew what it meant. Undeterred the NFU launched a new marketing initiative called the ‘Promise Campaign’ to boost the Red Tractor in the Summer of 2004, with a total budget of £37,000.¹⁰⁰

Farmers were asked for personal guarantees about farming practices many of which consumers might have thought were routine. ‘We promise to give our beef cattle dry and comfortable bedding’. In December 2004 the winner of the NFU’s Promises competition, was named after coming up with the winning promise: ‘I promise to treat each of my cows as she deserves: molly-coddled, manicured and milked.’¹⁰¹

But the achilles heel of the logo is that it does not guarantee the food is British, only that it is produced to British farm standards. Despite this in April 2005 the logo was re-launched with the ‘Union flag a clear part of the new symbol’. Who owns the new logo? The NFU.¹⁰²

According to Assured Food Standards’ Head of Marketing, Bev Wilson ‘The new logo is a powerful expression of Red Tractor values. It offers reassurance about origin and traceability throughout the food chain. And symbolises the delivery of safe and conscientiously produced food’.¹⁰³ Three months later, Assured Food Standards had to counter persistent accusations that Brazilian beef was being sold under the Red Tractor.¹⁰⁴

4.7 Real Local Food Initiatives Have Also Been Thwarted

Before the Foot and Mouth outbreak in the UK in 2001, there were essentially two different philosophies underpinning British agriculture. There was the ‘local food movement’ where you had a myriad of bottom-up grassroots initiatives, box schemes, farmers markets, direct selling, co-operatives, local food groups and farm shops that were already trying to connect the farmer with the consumer.

Then, the mainstream supermarket controlled retail market, where farmers were selling into the mainstream retail or convenience food sector, to supermarkets or for export, with their businesses trying to compete on an international scale.

Surveys have shown that 90% of consumers would prefer to shop at a farmers market rather than a supermarket.¹⁰⁵ We have tried to track the £500 million that is being invested in British food and farming. If those in charge of British agriculture invested money in proportion to people’s wishes then the vast majority of it would be for alternative food and farming systems, where there is a direct connection between consumer and farmer. This is not happening.

Instead millions has been invested into new institutions whose primary role is concerned with 'increased competitiveness' 'efficiency' or 'benchmarking' – all philosophies that essentially benefit the supermarket system and that of big food.

Let's look at the example of farmers markets that are a deliberately separate modus operandi of food production and consumption. The food is grown locally and sold within a 30-mile radius of where it is produced. They offer a direct connection between farmer and consumer. They were promoted in Curry's report as 'a successful way forward'.

So what happened when the pioneering organisation NAFM – the National Association of Farmers Markets – applied for £150,000 funding for three years from Defra? In November 2001, Lord Whitty, the Government's Spokesperson for Environment, Food and Rural Affairs, addressed the annual conference of the Farm Retail Association, one of the founder members of NAFM. Whitty asked the question 'What is the Government doing to support rural food businesses?' He outlined five key areas:

- Support Food From Britain including £1.7 million to aid post-FMD recovery;
- Encouraging supermarkets to source more local produce;
- Research into tourists attitudes on regional foods;
- Encourage development of farmer's markets and providing funding to NAFM;
- Countryside Agency's 'Eat the View'.

Whitty enthused about farmer's market's that were a 'perfect opportunity' for the link between farmer and consumer to develop. 'By selling direct to consumers, producers can get the full consumer price, save on packaging and transport costs and get instant feedback about their product from their customers'.¹⁰⁶

Seven months later, in the summer of 2002, and just months after the Curry report had been published, NAFM wrote to Defra asking for funding. The reply from Defra was negative. That September NAFM approached Lord Whitty directly. The Association's letter argued that 'There is a real risk that NAFM will cease to exist within 5 months unless we can secure Government support. This would be another bad blow for farming and the countryside ... They have been a lifeline for small farmers and a key component of the move towards direct selling and local food. They have helped regenerate markets in small and large towns. They have established new links and new dialogue between town and country'.

NAFM were given a meeting with Lord Whitty himself in December 2002. NAFM's PowerPoint was certainly persuasive. It outlined NAFM's achievements:

6,000 producers selling at 450 markets

Certification: target of 150 certified, 50 in process

Membership: 220 and rising

Website: 1m hits annually

Regional tourism leaflets

Seasonal and other promotions

General ongoing interest and press response

Markets themselves in control of NAFM

Recovery following FMD

.....*achieved very cost effectively with Coordinator and 1.5 other staff*

Whitty and Defra refused the funding request in December 2002, despite Whitty's personal commitment to fund farmer's markets nationally (see above). Steve Bendle the Chief Executive of Envolve, one of NAFM's founder organisations was outraged: 'I cannot understand why the government cannot see that a tiny amount of money put into NAFM was not fantastic value for money. Why didn't they want to give £50,000 to one of the few good stories around? It's a mystery'.

NAFM was forced to merge with the Farm Retail Association, causing a split within the board and the resignation of its key member of staff. Defra helped fund some of the costs of the merger, which they argue has 'created a more effective body' that has 'retained the best qualities of both separate organisations'.¹⁰⁷

This is disputed by Stephen Bendle, who sees a fundamental and clear difference between the philosophies of the two organisations. Farmers markets only sell local produce – normally around 30 miles from the market, whereas the Farm Retail Association whose members sell through farm shops, can sell anything as long as there is a local component.

'The two philosophies do not really work well together', says Bendle. 'The Farm Retail Association was set up by the NFU. What they are trying to do is give farmers an alternative income. If what you are selling from your farm shop is not all year round, [and] then over the winter you have to sell bananas and kiwi fruit, then that does not matter as long as there is a local component. That is a perfectly legitimate form of business. But within that you cannot fit the "we are determined to sell local come-what-may ethic" as it is a slippery slope'. It is a slippery slope that erodes the whole philosophy of local food and food miles and the local food movement.

In September 2003 Defra's 'Policy Paper on Local Food' was released. Item 36, says that at 'at national Level, Defra will support the farmer's market movement nationally'. Defra supplied us a list of local food projects funded in line with this paper which did include positive projects and initiatives including funding for projects in Devon, Somerset, Cumbria and the New Forest, as well as initiatives on best practice and public sector procurement and research on food miles.

However, pioneering groups in Devon, Somerset and Cumbria say that funding is a huge problem. Paul Sander Jackson from Somerset Food Links argues that 'Regionally funds for local food projects have become harder to access rather than easier since Curry'.

The lack of funding for local food projects in the South West is even more perverse given the new quango – South West Food and Drink – that had been set up to actually help the food sector in the region. Meant to be a flagship organisation, it is seen by many in the local food movement as an unmitigated disaster, not only lavishing money on consultants fees, whilst strangling the local food sector and not funding consumer-marketing initiatives.

SWFD's accounts record that for 3 months one of the Directors was paid £36,700 'in respect of consultancy services' which works out at about £12,000 a month. This is slightly less than the average farm income for a whole year. Directors' emoluments for that period were an additional £22,647. Insiders have told us that one consultant was paid £800 a day for twenty days work.

A leaked copy of their budget 'bid summary' for public funding shows that organisation wanted £7,724,250. Yet when a consumer marketing initiative called 'British Agriculture Marketing' asked for £80,000 sponsorship to promote British agriculture to consumers, SWFD argued there 'is no money'. In later correspondence Jeremy Pope, on behalf of SWRDA / SWFD explained: 'The issue is budgetary rather than philosophical. Your financial inputs would absorb our entire budgets from Defra for regional food promotion'. Although it is unclear what budget SWFD had received by then, British Agriculture Marketing are convinced that SWFD had the money to fund them.

SWFD has been severely criticised for either not funding local food organisations or for taking so long to reply that the organisations have become financially nonviable. 'SWFD has become a barrier rather than a conduit for funding- after two years you really have to ask what it has done to help the food industry in the South West', argues Carol Trewin, ex Cornwall Manager for Taste of the West, one of the subsidiary organisations under SWFD. Trewin argues that "Local food initiatives have been strangled by SWFD's inability to make the system work".

One such group is the South West Local Food Partnership (SWLFP), a coalition of local food groups that folded as a result of SWFD's inability to fund it. Paul Sander Jackson, the Head of Somerset Food Links is the ex-Chair of the Partnership. He sat on SWFD's board. 'Because of not being able to access funding through SWFD, the SWLFP is currently unable to trade, and has had to sack two co-ordinators due to lack of funding. It got to the point that the organisation was not able to meet its commitments'.

Another SWFD insider says simply: 'There is the corporate economic based mindset and then there is the social and environmental and sustainable development mindset and the two haven't been well balanced'. It is the prominence of the big food neo-liberal mindset that has hampered progress on local food.

4.8 Farm-gate Prices Remain Low

The raw muscle of supermarkets means that for many farmers or small suppliers the supermarkets can push down prices to below or near cost of production. This is most acute with the dairy industry. It costs the UK dairy farmer between 18 and 23 pence to produce a litre of milk and yet, since 2000, average farmgate milk prices have varied between 16 and 20 pence per litre. Therefore, on average, farmgate prices are not high enough to cover farmers' costs.¹⁰⁸

In 2000, a new organisation Farmers for Action (FFA) was formed to tackle the continuing low milk price and NFU's failure to act. A rival to the NFU, its members started undertaking direct action by physically blocking the entrances to supermarkets. One of the founders, Somerset farmer Derek Mead argues that their negotiations, which were progressing well with the supermarkets, were scuppered by the NFU. They had had a positive response from Safeways and Waitrose. 'Then we started to deal with Sainsburys, Tesco and Asda and walked straight into a blocked wall. The blocked wall was created by the NFU,' he alleges.

Leaked notes about the protests written by the Dairy Industry Federation that represents what you could call 'big milk' - the interests of the milk processors and manufacturers of dairy products - noted that 'the basic strategy of the Farmers for Action group has been to try and

increase the return to farmers from the liquid market'. The notes also noted that the NFU felt 'disconcerted' that the supermarkets might talk to FFA, rather than going through the NFU.

Secret minutes leaked to SpinWatch of a meeting held on 24th March 2000 between the Dairy Industry Federation and the NFU show that the NFU promised the milk trade that they would not give Farmers for Action any support, even though the protestors were trying to increase the price of milk for farmers. Their minutes note: 'There was a quick discussion about the activities of Derek Mead and the farmers' blockades'.

Richard Macdonald, the Director General of the NFU, was also at the meeting. Macdonald is not a farmer, but the ultimate NFU insider, having joined the organisation in the late 1970s as a parliamentary lobbyist and adviser. By the late eighties he was their South West Regional Director, becoming Director General in July 1996. He is also Chairman and a Director of the Board of Associa Ltd, a joint company with NFU Mutual.¹⁰⁹

The minutes show that Macdonald then 'stressed the difficulty this presented for the NFU, particularly as one of the organisers, Richard Haddock, was an NFU Council Member. There was serious anxiety from farmers about the state of affairs'. It then noted that the Dairy Industry Federation 'were fully supportive of the NFU in giving the unofficial protestors no encouragement.' When Ben Gill arrived late for the meeting he 'deplored the letter from Richard Haddock to the Farmer's Weekly and in the FW editorial (which encouraged the unofficial protests).'

The dairy industry remains in crisis. On the 8th June 2004 the Select Committee on Environment, Food and Rural Affairs published its long awaited report into the dairy industry. It made stark reading: 'UK dairy farmers are in a financially difficult position and have been experiencing low incomes since the deregulation of the dairy market in 1994'.

The MPs noted the continuing problems for farmers regarding the power of the supermarkets and the lack of a strong Competition Commission code of conduct. There 'remains a fundamental imbalance of negotiating strength between supermarkets and most of their suppliers. The code appears to have been ineffective in redressing this imbalance, at least in respect of the dairy supply chain'.¹¹⁰

But does the NFU agree that supermarkets were to blame? No. Does it support the continuing protests by FFA? No. Robin Tapper, the head of NFU's food and farming department argued in the summer of 2004 that 'Retailers have responded positively to farmers' demands. They haven't been driving prices down so it's difficult to reconcile their sensible approach with the latest protests'.¹¹¹

4.9 The NFU is Too Close to the Supermarkets

Robin Tapper heads the NFU's work on supermarkets. Before moving to the NFU, he was employed at Sainsburys for over a decade. When he moved to the NFU to work on marketing he replaced Helen Lo, who was also ex-Sainsburys and who farmers 'accused of being too kindly-disposed towards her former employer, Sainsburys'.¹¹²

The NFU is not a member of the Breaking the Armlock Alliance and continues to advocate a 'voluntary code', much to the dismay of other farming organisations such as the Tenant

Farmers Association or the National Sheep Association's John Thorley: 'The supermarkets dominate the retail end. The only way they can move forward is by screwing the primary producer. A voluntary code, as time goes on, has proven to be totally useless'.

Moreover, the NFU has been actively undermining Somerset farmer Derek Mead, who is pushing for a statutory code and undermining a statutory code itself. On the eve of Tesco's AGM in 2004, Mead teamed up with Friends of the Earth to attack Tesco and argue that 'voluntary codes meant to protect suppliers and workers are ineffective'.¹¹³

In response, the NFU circulated an internal 'Newsflash' obtained by SpinWatch. It read: 'Friends' of the Earth will present to MPs a report claiming that Tesco is damaging communities, putting local shops out of business and threatening the livelihoods of many UK farmers. The press release contains comments from Derek Mead, named in the press release as a member of the NFU Council for Somerset'.

The NFU argued it did not 'endorse' FoE or Mead's comments and that 'It is more important than ever before that the NFU maintains close working relationships throughout the food chain. As the largest customer of British agriculture in the UK, Tesco remains a key partner.'¹¹⁴

Whilst the NFU does not necessarily have to endorse the comments of a particular Council Member, here in print was an admission from the NFU that it sees the supermarkets as the consumer. When Curry said that British agriculture had to reconnect to the British consumers, he meant the general public, but for the NFU, it is the supermarkets.

Mead also had his own amendment for a statutory code blocked by the NFU upper crust at the Council Meeting in May 2004. The following month, the NFU Policy Board on which Macdonald sits, met to undermine the concept of a statutory code and push their 'voluntary code'. Leaked minutes show that 'it would be helpful if examples of other statutory schemes which had *not* worked were included in the paper'. It looks like the NFU was deliberately seeking out to show that statutory schemes on supermarkets did not work, and that voluntary ones do.

The NFU's alternative voluntary code, called the 'Buyers Charter', included proposals 'whereby grievances between a buyer and a supplier can be heard, in the first instance at company level'. So if a supplier has a problem they take it to the company, with all the continuing problems of blacklisting. Not surprisingly the Charter was widely condemned by environmental groups and farmers alike.

But it was praised by Tim Bennett, the NFU's President, in a speech to the IGD in October in 2004: 'The NFU is currently working with our food chain partners in FDF, BRC and the food service sector to develop a "Buyers Charter" which we hope will provide a framework for good business practice and the development of sustainable, transparent, accountable business partnerships.'¹¹⁵ Critics argue it will be neither sustainable nor transparent, but toothless. John Redmond, the former county chair of Somerset NFU argues that 'The fact that the NFU won't support a statutory code for the supermarkets just shows how close they are to the supermarkets'. Most NFU members believe that the NFU is too close for comfort.

5 In Spite of Curry There Have Been Successes.

Has the Curry Commission resulted in substantial funding of local food groups and farmers markets? No. Has it led to a champion for local food? No. The press release from the Curry Commission argued for a 'new national champion for "local" food, to assist this exciting new market expand'.¹¹⁶ Has this happened? No. Has it led to a reversal in the fortunes of British dairy farmers? No. Or beef farmers? No. Has it reconnected the British consumer with farmers? No. In fact what has happened is consolidated neo-liberal control into the hands of big food and the supermarkets.

Despite this, the local food movement has been expanding despite the lack of funding. Take farmers markets: in the last two years the number of farmers markets has increased from 200 to 450, a rise of 125%. Their turnover is £166 million - more than double the amount just two years ago.¹¹⁷

The demand for organic food is growing at a huge rate too – some £2 million a week. But most importantly consumers are reconnecting with farmers on their own. According to the Soil Association in 2003 sales through box schemes, farmers markets and farm shops grew faster than any other retail outlet at 16 per cent. Box scheme sales have increased by over 20 per cent.¹¹⁸ The trend has accelerated. In 2004, organic food sales through box schemes, farm shops and farmers' markets increased by 33%. In contrast the main supermarkets saw their share fall from 81% to 75% as consumers become more concerned about food miles, packaging and provenance.¹¹⁹ There are notable success stories. For example, Riverford, the award-winning organic farm in Devon, is expanding its business rapidly using a non-supermarket model of growth via franchising.

But still award-winning farmers markets continue to struggle. The BBC Radio Four Food Programme's best farmers market for 2004 was Orton Farmers Market, co-ordinated by Jane Brook, who runs two markets. The first is in the small community of Orton in the Eden Valley in Cumbria, the second a summer pilot scheme on the shores of Ullswater in the Lake District. 'We started the market in 2000 with borrowed equipment and a £250 start up grant from the Countryside Agency and £250 from the District Council', recalls Brook.

Over a two and a half period Brook attracted some £42,000 in grants, most of which had to be match funded. The market became a roaring success. 'We exceeded all our targets', says Brook. 'The market grew from 300 to 1500 (occasionally as much as 3000) customers and from 12 to 45 producers. The income generated for the local economy as a result of the market grew from £45,000 per annum to £150,000 per annum. We were the first accredited market in the country. 63% of the producers come from within 20 miles of the village and 25% from within 5 miles'.

Food writer, Rick Stein, named four of the regular producers as Food Heroes. 'In terms of impact we have probably enabled ten new businesses to set up and are helping to sustain a further 32', argues Brook. Urged by funders, Brook put in for further funding requests, but has not been successful. 'All I can say is that now I can't access any money'.

As local food pioneers such as Brook continue to struggle for funding, a whole array of post-Curry initiatives promote solutions that can only help the supermarket and not the small farmer. None of these addresses the power of the supermarkets, which is set to intensify.

None address the flood of imports, which is set to increase. None will address the low farm gate price paid for many products, especially milk.

British farming will have no future unless the power of the supermarkets is addressed and unless farmers receive a fair price for their produce. But to the people in the cabal the supermarkets are the solution. To everyone else they are the problem. In that essence Curry has failed.

As long as the NFU and its allies continue to direct funding and resources that benefit supermarkets then British farming will die a slow painful death. As long as supermarkets are seen as consumers and not the 60 million British public, then British agriculture will continue to be in trouble.

Every week more and more shoppers are voting with their feet at small scale initiatives, shopping at a farmers market, farm shop or receiving a box scheme, changing British agriculture for the better. 'Farmers markets like ours that are genuine really do have a contribution to make to the triple bottom line – to the environment, community and economy,' says Jane Brook from Orton Farmers market. 'We can ensure small business can grow. What is wrong about lots and lots of small initiatives – why does big have to be best?'

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