EXPLORING THE MARKET POTENTIAL OF 'LOCAL' IN FOOD SYSTEMS

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Abstract

Local food initiatives create a niche market in many developed countries where consumer choice is being met with an expanding offering in both conventional as well as complementary retail outlets. Supermarkets in conjunction with the food service sector currently dominate food sales and consumption, and are likely to do so for the foreseeable future. However, the local food sector offers an opportunity for implementing niche marketing strategies for many businesses. Local food activities tend to be relatively independent activities and a clearer definition for "local" food would assist in consolidating this important component of the food system. Related to this, consumers would benefit from the establishment of some form of assurance system for the 'localness' of food. In the UK, with its well established local food market, farmers' markets, farm shops and box schemes are currently having the largest impact in terms of total sales. Hence further research is required to confirm that support for similar business ventures in Australia would be a viable strategy for strengthening its local food systems.

Keywords

Local food, food production, food consumption

Introduction

The current food system in most developed countries around the world is dominated by large scale multinational food processors and retailers. This has become more pronounced over the last 50 years and has led to the lengthening and hence globalisation of many food supply chains (Ilbery and Maye, 2005). Consequently many consumers are unaware of, and have minimal connection with, where their food comes from (Svenfelt and Carlsson-Kanyama, 2010). However, in parallel with this, and somewhat in contrast, some consumers are interested in the production and supply of their food (Seyfang, 2008). These interests include nutritional health, ecological sustainability, and animal welfare, as well as diversity and distinctiveness in food purchases (Higgins et al., 2008).

Kirwan (2006) suggests that part of the response in the marketplace to these consumer-led concerns has been to incorporate closer connections among individuals, including those linking consumers with producers, referred to 're-socialising' food. This partly explains the rapid growth in direct food marketing activities, many of which include face-to-face links between the consumer and the producer, such as farmers' markets. In addition, emerging interest in where food comes from and concerns about environmental impacts from transporting food around the globe has been referred to as 're-spatialising' food. This has resulted in the creation of many shorter food supply chains—again farmers' markets exemplify this. These changes are increasing the emphasis on 'people and place', or provenance in relation to food purchases, and the emergence of a local food movement may be seen as a visible manifestation of them.

Local food systems and their short(er) supply chains have been written about widely and are seen by some to provide a range of interrelated economic, social and environmental benefits (See for example Feenstra, 2002; Hinrichs, 2003; Marsden et al., 2000; Morris and Buller, 2003; and Renting et al., 2003). This article profiles a well-established local food market; looks at 're-spatialising' and 're-socialising' within the food system; and, after a discussion of the critical implications, concludes with some suggestions for further research.

Activities in a well-established local food market

Supermarkets in the UK remain the dominant option for household purchases of grocery items. They have "significantly reconfigured supply chains, developing sophisticated outlets and distribution systems… and importing huge volumes of produce from around the world" (Ilbery and Maye, 2006: 352). They represent an incredibly efficient logistic network, which is able to source and distribute a huge range of individual products, often over 40 000 in each store. These retail outlets offer relatively low prices and a convenient shopping experience in terms of parking, opening hours and 'one-stop' shopping. The product assortment offered on supermarket shelves represents the qualities consumers have come to expect, including "year round availability" of seasonal products and a "uniform" product range (Ilbery and Maye, 2006: 353). Furthermore, the competition between supermarket chains is intense and results in numerous product innovations and detailed market segmentation for differing consumer preferences.

In contrast to the dominance of supermarkets in the UK, the most recent estimate is that the local food sector accounts for around 1.5% of total food sales (Brown and Geldard, 2008), or approximately the same size as the organic food market. However, as there is no formal definition of the term local food this must be seen as only an educated estimate. If the most stringent definition is applied, that of food grown, processed, purchased and consumed within a radius of 30 miles (50 kilometres), then the amount is likely to be much less than 1.5%. If, however, it encompasses regional food, for example one of the nine Regional Development Authority areas in the UK, then the amount may be as high as 7% (Defra, 2007). To take the largest area that is considered by some to represent local food, that is the UK, then the market share equates to almost 60% (Defra, 2011).

Interestingly supermarkets in the UK are already adapting their business model to incorporate the changing consumer preferences associated with local food. For example, many are publicly expressing their desire to increase the 'localness' of their products. The largest grocery retailer in the UK, Tesco, states that they have over 7000 local products in their stores and have plans for even more (Tesco, 2011). Although they use Britain for their definition of local food which, at approximately 300 by 500 kilometres, is significantly larger than some other geographic boundaries used to specify local food, it is interesting that local food is important to them. Similarly, Waitrose, the high price/value supermarket, also promote the fact that they sell both 'local' and 'regional' food, the former required to have been made within a 30 mile radius of the store that it is sold in, the latter coming from a larger area and being more widely available, for example East Anglian potatoes (Waitrose, 2011). In support of this, local food hubs (see for example, Plumgarths Farm Shop at http://www.plumgarths.co.uk/ and MLFW, 2009) are successful businesses that aggregate local supply for wholesale consumers who may include large distribution networks such as supermarket supply chains.

Although the majority of grocery sales are through supermarkets, there are many other businesses in the UK that focus on selling local products, or may include local products, amongst others, as a result of their business strategy, with farmers' markets, farm shops and box schemes currently having the largest impact in terms of total sales (Pearson and Bailey, 2009).

First, there are two particular types of market in the UK that focus on local food products, Farmers' Markets and Country Markets.

The Farmers' Market Association (FARMA, 2011a) estimates that there are 500 or so Farmers' Markets in the UK with annual sales in excess of GBP500 million, and over 200 are Certified Farmers' Markets that comply with specific standards. In these markets the food must be local, which is expressed as a radius. Preference is given to a 30 miles radius, with up to 50 miles accepted for larger cities as well as for remote towns and villages, and 100 miles as the absolute maximum (50, 80 and 160 kilometres respectively). Local may also be considered as a County or other designated geographic boundary, encompassing an area similar in size to that defined as within a certain radius. Further, the products must be grown or reared on the producer's land and someone directly involved in the food production must operate the stall.

Country Markets are similar to Farmers' Markets however they provide opportunities for home producers to sell items locally, and co-operatively, directly to the public. Their logo is "home-grown, home-made, hand-crafted" and all perishable foods must be fresh. There are around 400 Country Markets in the UK with an annual turnover of around GBP 10 million (CM 2011).

Second, farm shops and box schemes are other types of retail outlets that tend to provide local food. Again the Farmers' Market Association (FARMA, 2011b) estimates that there are over 1000 farm shops that sell direct to the public in the UK. Many of these have passed the FARMA accreditation for quality, service, and value and sell only local foods.

Box schemes, also known as vegetable box schemes, are usually run by a farmer who makes weekly deliveries either directly to homes or to a local collection point. All consumers receive the same range of seasonal fresh fruits and vegetables in their box, although some include other items such as meat and dairy. Most of these products are locally grown. It has been reported that the first box scheme was set up in 1991 and the most recent estimate is that there are 500 such schemes supplying 60,000 people (Brown et al., 2009). Hence most urban consumers are able to choose from a number of competing box schemes. Some of these are explicitly local, such as Tolhurst Organics (http://www.tolhurstorganic.co.uk), whilst others are large businesses, such as Riverford (http://www.riverford.co.uk) with annual sales in excess of GBP 20 million, 300 staff and delivering almost 50,000 boxes each week. Many of these box schemes have emerged from the organic food movement.

Third, some local food businesses are formed using the co-operative business structure. These member-controlled organisations often give high priority to social aims and provide services varying from social care for the elderly to food retailing. At a national level they are supported through Co-operatives UK (http://www.cooperatives-uk.coop). Food co-operatives include local food operations, such as the True Food Co-op (http://www.truefood.coop) with annual sales of GBP 300,000, as well as The Co-operative, a large supermarket chain that has backward integrated into sourcing products from its own farms and has a GBP 10 billion turnover (http://www.co-operative.coop).

Fourth, Community Supported Agriculture (CSA) is another approach to supplying local food that removes many of the independent organisations between producer and consumer. CSAs create a partnership where consumers invest in a local farm in return for a share of the harvest. This investment is often in advance and may be in cash or kind, such as working on the farm. Many CSAs use organic methods and have the potential to create a very direct connection between consumers and their food source.

Finally, perhaps the most 'local' food supply chain is a domestic garden, community garden (Firth et al., 2011) or allotment in the UK, where the transport may be measured in 'food feet', rather than 'food miles' (Pearson and Bailey, 2009). These range from acres of sculptured gardens surrounding a stately home to a window box of herbs in a suburban flat. Gardens have many purposes including recreation and beauty as well as food production. In the UK there are numerous organisations that support different aspects of gardening including the Royal Horticultural Society (http://www.rhs.org.uk) and more specialised organisations such as Garden Organic (http://www.gardenorganic.org.uk). In addition to home gardens, an Act of Parliament over 100 years ago gave the UK public the right to an allotment garden. This access to a small area of public land for growing gives them the possibility of obtaining fresh food; and, according to the National Allotment and Gardeners Trust (http://www.nagtrust.org), in many areas allotment associations have lengthy waiting lists.

Gardening is one source of local food that receives very little attention in the literature. Although the scope for selling garden produce is limited, the sheer number of gardens suggests that at a national level, their contribution to food production, and security through increased diversity and resilience, could be significant. Gardens also contribute to food democracy by providing access to food production for many people.

In addition in the UK there are a number of 'third sector' initiatives (being independent of Government and industry) that are not visible in the academic literature. These include the GBP 50 million Local Food Consortium (LF, 2011) and the GBP10 million Making Local Food Work (MLFW, 2011). Together these are providing an increase in the availability of local food through their funding to around 1000 grassroots projects which, it is envisaged, will leave an enduring legacy of new and expanded local food businesses supported by experienced staff and informed consumers.

Re-spatialising within the food system

The notion of 're-spatialising' food emerges from consideration of where food comes from and associated concerns about environmental impacts from transporting food over long distances.

Although the term local food is frequently used (see for example, DeLind 2011) it is without a widely accepted definition (USDA, 2010). This is in contrast to some other niche food markets, such as organic food, which has developed over the last 50 years into a vibrant market (Pearson, 2011b) with over GBP 1.7 billion in annual sales in the UK (SA, 2011a) and AUD 1 billion in Australia (BFA, 2010).

The term local food relates the distances food travels between production and final consumption. It is applied to foods that are grown, processed, purchased, and consumed within a single area. Over a decade ago, Tregear et al. (1998) recognised the importance of place and context of purchase in authenticating local food.

Similarly, and more recently, Seyfang (2006: 386) stated that local food should be "consumed as close to the point of origin as possible". However, various organisations use vastly divergent geographic measurements to identify local food areas. These range from 600 kilometres (USDA, 2010) to 50 kilometres (FARMA, 2011a).

In addition to this potential for confusion around the term local food there is the issue of "locality" foods (Jarosz, 2008; see also Morris and Buller, 2003). A locality food is considered to be one that is produced in a particular area however it may be sold anywhere in the world. For example, the 'owners' of these products may apply for, and be awarded, legal protection through the European Union Protected Designation of Origin (PDO) regime (Profeta, 2010). Common examples include many wines and cheeses. Further, the term locality should not be confused with a product brand that includes reference to a particular area, but where it is not exclusively produced or sold in that area. One example would be Guernsey cream that comes from the Guernsey cow. Originally from the Island of Guernsey, these cows are now raised and milked, and their product sold, throughout the world (Guernsey, nd: online).

Even if the geographic issue was resolved there are other complications in defining local food. These include the complexity created when considering multiple ingredient products, multiple sources for the same product, and multiple supply chains for the distribution of a product.

Re-socialising within the food system

It has been suggested that some consumer-led concerns focus on 're-socialising' the food system. These social interactions associated with acquiring local food are reviewed in terms of the motivations of consumers, and of those who produce and supply the food.

The literature suggests that the local food sector is growing, and that this is in response to consumer demand (see for example, Sage, 2003; Jones et al., 2004; Chambers et al., 2007; McEntee, 2010). The reasons for consumers to get involved with local food are many and have been thoroughly researched with a number of recent reports covering their behaviour, motivations and expectations (FSA, 2003, 2007; Defra, 2008; Pearson et al., 2011a). It has been suggested that it is not just one simple concept; rather, the local food sector embraces various layers of appeal for consumers (FSA, 2003). Although price, quality and convenience are of paramount importance for food buyers (Svenfelt and Carlsson-Kanyama, 2010), it is evident that distance is the key issue in relation to the reasons that consumers choose to buy local foods.

Whilst local food implies proximity, consumers may also be attracted to its connotations: the small scale; environmental friendliness; health (due to lower usage of artificial chemicals, including preservatives required for time consuming transport); artisanal craft; and a general avoidance of mass production methods used in large scale industrial agriculture. Local food networks may facilitate the creation of positive associations between particular places and foods by consumers. This direct engagement with producers through accessing local products provides an opportunity for them to partake in the 'cultural capital' (Holloway and Kneafsey, 2000; Smithers et al., 2008) whereby their food choices are a way of creating forms of social identity. Consumers are able to obtain food products from particular people and places. As such they are associated with notions of territory and social embeddedness (Ilbery and Maye, 2005). Alongside this they are making connections between purchasing and the food system which give them insights into that system (Verbeke, 2005) as well as the potential for greater awareness of seasonality and information about how to prepare particular foods (Svenfelt and Carlsson-Kanyama, 2010).

This consumer knowledge of food origins tends to carry with it an implied, or expressed, "assurance of food quality" (Smithers et al., 2008: 340; see also Sage, 2003; Ilbery and Maye, 2005). Thus local food networks are generally based upon 'trust' (Kirwan, 2006) or 'regard' (Sage, 2003). For example, research by Smithers et al.

(2008) found that many local food consumers surveyed had no concerns regarding the outlets they were purchasing from, assuming that the food was produced in the local area, albeit undefined, and that trust was implicit. The assumption that the vendor was also the producer was rarely questioned. If this assumption was questioned, the vendor was assumed to be someone with connection to the producer, and knowledgeable about the product. This was considered to be acceptable (Kirwan, 2006). In addition to encouraging consumer trust, these personal interactions engender consumer loyalty that benefits the producer. As Sage (2003: 49) summarises, the rise in local food networks demonstrates a consumer's search for "good food" and "(r)ecovering a sense of morality within the food and agriculture sector is arguably one of the most important emerging characteristics of alternative [complimentary] food networks".

Similarly, Smithers et al. (2008) found that consumers held beliefs about the way in which the product was produced, assuming that methods used in local food networks were more environmentally beneficial and that the product was fresh, such as perishable fruits and vegetables having been harvested that day or the day before. As such, local foods have a particular resonance for fresh products, encompassing fresh and unprocessed fruits and vegetables as well as dairy products, meats, and sometimes bakery items. Following on from this, Winter (2003) states that the turn to 'local' in the food market has been constructed around consumer concerns over human health and food safety, the environment, farm animal welfare, and fair trade.

In addition to the environmental benefit of less transportation resulting in a reduction in energy use and pollution (Seyfang, 2006) and being more resilient than longer supply chains, the shorter distance between producers and consumers may reduce the number of independent organisations in the supply chain. This potential for a closer connection between producer and consumer (Hinrichs, 2003) may engender higher levels of trust and belief in product authenticity. Such relationships may also lead to consumers becoming more educated about the source of their food, as well as creating feedback mechanisms for both producers and consumers (Seyfang, 2006).

Aside from this, Chambers et al. (2007) mention recreational aspects where buying local food may be seen to offer a leisurely and pleasurable alternative to the mainstream supermarket shopping experiences. However, the converse of this is that buying local food is often seen as being inconvenient and this acts as a key barrier to consuming more of it. Consequently shopping for local food tends to be sporadic and opportunistic. Thus, most consumers are not shifting to local food entirely but rather, diversifying (Smithers et al., 2008) and hence local food networks maybe seen as complimentary to the mainstream that includes supermarkets and the food service sector. This is consistent with the conclusions reached by Byker et al. (2010) who suggest that a pragmatic solution is to continue buying non-local products whilst benefiting from the enjoyment and challenge associated with seeking local foods.

In summary local food has a number of different aspects that are attractive to a wide variety of consumers. This allows for consumers to be segmented into clusters, based on their different motivations. For example, the Food Standards Agency (FSA, 2003: 32) suggests that the different consumer segments in the local food market are:

- Quality: The perceived superior freshness, and taste, of the food.
- Community: Support for the local economy and local services.
- Confidence: Knowledge of the food's source or provenance.
- Health: Perceptions of food being fresh and using fewer chemicals for maintaining freshness.
- Green: Concern for environmental sustainability.
- Pluralist: Options for food shopping, rather than dominance by supermarkets.
- Enrichment: Diversity of food shopping experiences, including some leisure value.

As evidence of the diversity of consumers and thus distinct market segments a variety of organisations have emerged to service different consumers in the local food sector. For example in the UK these include farmers' markets, farm shops, box schemes, Co-operatives, and Community Supported Agriculture as previously discussed.

The majority are small to micro businesses, although there are some large local food producers with national distribution. Many of these businesses bypass intermediate organisations in the supply chain. This enables them to have more direct contact with their final consumers and hence contribute to re-socialisation within the food system.

Motivations of local food producers and suppliers

The main motivation for organisations and individuals who produce and supply local food would appear to be the possibility of improving their economic viability (Kirwan, 2006; Smithers et al., 2008). There are also benefits to the community associated with retaining more money in the local economy (Seyfang, 2006), and, depending on the location of the activity, this may contribute to rural development.

The economic benefits emerge because a greater proportion of the amount spent in local food businesses, as compared with a supermarket, stays within the community and will generate other sources of economic activity (Sacks, 2002). This is known as the economic multiplier and, for local food, is reported to be as high as three times the original expenditure (NEF, 2002). Renting et al. (2003) even go so far as to suggest that in some circumstances producers who pursue local food activities are able to take greater control over their production, which leads to increased personal satisfaction.

However, there are also potential disadvantages for food producers and suppliers from local food activities. This suggests that different food systems are in fact complementary and that excessive reliance on any one, be that local or otherwise, is a suboptimal result. For example, one of the major issues in relation to local food is that these activities diminish the benefit from comparative advantages in production, where a particular region is able to provide a product at lower economic, and sometimes environmental, cost. Hence the widespread adoption of local food would result in some producers and suppliers engaging in financially expensive activities that have a high detrimental environmental impact. Associated with this is that some consumers would suffer by either missing out on being able to purchase the product, or if they do, purchasing a locally grown product at a higher price and/or greater environmental impact. An interesting example is apples and lamb. The UK is a big importer of apples and lamb from New Zealand. One study found that the carbon footprint of in-season production and transport from, literally, the other side of the world to the UK resulted in a smaller energy usage than storage of UK production for six months to allow for out-of-season consumption (Saunders and Barber, 2007).

Thus it would appear that there is not a consistent and positive support for the potential environmental benefits of local food (USDA, 2010). For example Pretty et al. (2005) examined the environmental costs of food production including on-farm costs as well as domestic and international transport. They concluded that reduced food miles could reduce external costs. Conversely, more recent research measuring the environmental footprint of local food supply chains concluded that food miles are a poor indicator of the full environmental impacts of food production (Edwards-Jones et al., 2008).

Another interesting tension emerges from considering the importation of products from lesser-developed countries. For example, there is a general trend for Northern European countries, such as the UK, to import food products from countries in the 'Global South', mainly from Africa. When the largest certifier of organic food in the UK explored the possibility of banning airfreight of fresh products, it was agreed in the ensuing consultation that airfreight, with its extremely high carbon footprint relative to other forms of transport, would only be allowed when it could demonstrate a clear developmental benefit to the exporting country (SA, 2011b).

Discussion of implications

In Australia full service supermarket chains govern food purchases with over 80% of grocery market share (DAFF, 2011). There is a lack of clarity around local food. This is compounded by the fact that many retail outlets, including two major grocery retailers Woolworths (Woolworths, 2011) and Coles (Coles, 2011) and the biggest national box scheme 'Aussie Farmers Direct' (AFD, 2011), use the word 'local' to refer to all food and products from anywhere in Australia. However, one of the smaller supermarket chains, IGA, does not provide explicit support for local food yet claims to enable "Australian business to continue to be active in the communities that they serve" (IGA, 2012).

Australia suffers from a lack of clear definition of 'local food' that, amongst other things, prohibits accurate estimates of its market share. For example the Australian Bureau of Statistics does not collect information on local or regional food and these terms provide only one hit on the ACT Government website—which is for wineries. Even within organisations that have developed and use a more restricted concept of local there are differing standards. An example of this is the box scheme 'Food Connect Australia' where produce is sourced within a 250 km radius of Sydney, and within a five-hour radius of Brisbane (FCA, 2011).

Similarly, farmers' markets in Australia, which provide another important channel for connecting local farmers and food producers directly with consumers, do not have unified standards for what constitutes local (AFMA, 2012). Some states, such as Victoria, use their own accreditation programs to assure consumers of the credibility of the stallholders and hence products offered to consumers (VFMA, 2011). This lack of consistency has the potential to create confusion amongst consumers and thus undermines their commitment to purchasing local foods.

There are also many initiatives in Australia that enable people to engage in local food activities. On a national level these include farmers' markets (farmersmarkets.org.au), community gardens (communitygarden.org.au) and initiatives such as 'Landshare Australia' (landshareaustralia.com.au). Whilst at a regional level, for example in Canberra, these include two farmers' markets (capitalregionfarmersmarket.com.au and southsidefarmersmarket.com.au), one food co-op (foodco-opshop.com.au), a farmer-direct operation with two retail outlets (chokubaijo.com.au) and a Slow Food convivium (slowfoodcanberra.com).

It would be valuable for further research to explore the possibility of developing some form of consumer assurance, or definition, for the 'localness' of foods, such as a label to identify local food products. A local food label could be based upon qualities associated with that product and also may encompass the place of production and/or its processing.

This clear identification would make the promotion of local food networks easier and, perhaps, provide a premium for the producer and associated suppliers. However, there would be some transaction costs for the producer in maintaining certification and expenses associated with promoting the label. In addition, there is the risk of both lack of consumer understanding of the label as well as the possibility of it being compromised by larger retailers (Higgins et al., 2008). However, the consensus appears to be that the local food sector would benefit from a clear label. This would make it easier to identify local food products at the point of sale for both existing and new consumers as well as assisting in highlighting its activities to gain support from government.

However there do exist labels or brands that already have meaning with consumers and capture many of the issues currently associated with local food. These include, for example, the organic food movement (whose certification system is built upon the principles of health, ecology, fairness and care [IFOAM, 2011]), and a carbon footprint label (with its emphasis on the environmental consequences of greenhouse gas emissions such as the example of Walkers crisps). Nonetheless, there would be limitations in using a uni-dimensional construct, such as a carbon label, or indeed food miles, as an indicator for a multilayered concept such as local food.

Conclusion

Supermarkets in conjunction with the food service sector are likely to dominate the food system in developed countries for the foreseeable future. Consequently their business model, based on global sourcing, is likely to remain. Nevertheless, the local food sector offers an opportunity for implementing a niche marketing strategy for many businesses, both large and small. Supermarkets are able to incorporate local food into their activities. In addition many smaller organisations have developed different business models that enable them to supply local food to their consumers. For example in the UK the most significant of these in terms of total sales are farmers' markets, farm shops and box schemes.

It would appear that consumer demand is driving growth in local food activities. Evidence suggests that an increasing number of consumers are interested in 're-socialising' and 're-spatialising' their food, hence there is potential for the local food sector to continue growing. In general, local food activities are fragmented. Local food is marketed through a range of retail outlets, some of which are purely 'local' and others that market both local and other foods. The situation is further confused by the different definitions of local that exist. For the local food sector to sustain this momentum it will need to maintain credibility with consumers, and could gain from providing evidence for its perceived benefits to both consumers and Government.

This exploration of the market potential of local food leads to two priority areas for further research.

The first area for research is in exploring the possibility of providing a clearer definition of local food. Such endeavours will make it easier to measure the size of this sector and monitor its anticipated growth. This will contribute to being able to understand its impact. However, its diversity will challenge the accuracy of achieving any realistic size measurements.

The second area is to explore the possibility of developing some form of consumer assurance for the 'localness' of foods. It could be based on a methodology that is similar to that used for carbon footprint measurements. An alternative approach to the carbon footprint would be an assurance guarantee in a similar manner to organic certification. Alternatively, due to the difficulties of developing a plausible local food-labelling scheme, it may be appropriate to use branding which either identifies the source of the product or identifies a specialised retail outlet that only supplies local food. In order to determine the most appropriate solution, there is a need to fully understand the differing consumer segments and their motivations for purchasing local food.

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