CPRE

Campaign to Protect Rural England

Standing up for your countryside

From field to fork:

NORWICH

Mapping the local food web

INTRODUCTION

A food web is a local network of links between people who buy, sell, produce and supply food. The concept stems from earlier research in east Suffolk,[1] which showed how a thriving local food chain can benefit the quality of life, prosperity and landscape of an area. It also showed how local food economies and independent retailing are under threat from supermarket expansion and increasingly centralised supply chains. The research concluded that we urgently need to identify food webs elsewhere and nurture them so they can thrive and resist the pressures which could undermine their benefits.

This report on Norwich is part of a wider national project, Mapping Local Food Webs, which builds on the east Suffolk research. It aims to:

- reveal the extent, nature and benefits of local food webs in other parts of England
- increase public and policy makers' awareness of local food networks and
- identify ways to improve support for the production, supply and sale of local produce around England.

Norwich was one of 19 locations across England to be mapped. The Mapping Local Food Webs project was funded by the Big Lottery Fund through the Making Local Food Work programme.

The report's findings come mainly from the work of local volunteers in and around Norwich from June to November 2009. There were interviews with outlets, producers and local residents, a public meeting and a public workshop. These were supplemented by further case study research and interviews in 2011 and a conference in 2012. Residents and outlets were interviewed within a 2.5-mile radius from Norwich city centre. Producers were interviewed from the 'local food' supply area, which falls within a 30-mile radius from this core study area.

This report summarises the key issues and sets out the main findings on the benefits of the local food web to Norwich and the challenges and barriers to a stronger local food system. The findings are divided broadly into economic, social and environmental themes. The report then gives recommendations on how to strengthen the local food web. A conclusion is followed by appendices explaining the national and local projects in more detail.

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SUMMARY

Norwich is the main urban centre in Norfolk with a population of around 195,000 people, and is the fourth fastest-growing city in the UK.[2] It is a regional retail hub with major city-centre shopping areas and district centres, and is among the top ten most prosperous shopping destinations in the UK. The city centre, surrounding districts and local shopping areas remain relatively distinctive with a good mix of 'traditional' independent outlets and the country's largest six-day-a-week market. The major five food retailers are present in Norwich, mainly on the edge of the city centre. The county of Norfolk has a mixture of large-scale commercial farming and local food production and this research shows a high number of producers overall supplying into Norwich. The Norfolk Broads and the Norfolk Coast Area of Outstanding Natural Beauty (AONB) bring tourists to the area, and tourism is a £1 billion-plus industry for the county.[3]

Key findings

Our research identified a number of strengths within the local food market, but also several challenges which need to be addressed to sustain and develop it.

Strengths

- 48 independent shops and market stalls, and four box schemes, are known to be servicing public demand for locally sourced, fresh, high-quality food; for 70% it represents more than half their turnover.
- Local food supports, we estimate, 240 jobs at outlets and over 1,150 at local suppliers.
- Local food sales in Norwich are an estimated £10.6 million a year and help to support turnover at supply chain businesses of around £52 million.
- A minimum of 150 local producers within 30 miles supply food directly to outlets we interviewed in Norwich, reducing food miles and related pollution.
- There is a strong demand for local food by shoppers, who buy it for its quality and to support local producers and businesses.
- Businesses are acutely aware of their interdependency and see that mutual support is a key business benefit.
- Local food can be a benefit to businesses through easier distribution and price competitiveness.
- Many local food businesses contribute to community life by donating to local good causes and offer a friendly, personal service with vital delivery services; shoppers respond with loyalty to local independent retailers, who are seen as part of the community.
- Local food businesses show a strong commitment to reducing their environmental impacts.

Challenges

- Many businesses selling local food are relatively small, are unable to benefit from economies of scale and lack the time and funds to do marketing.
- Marketing is a particularly important issue as some shoppers were unaware of local food despite availability being high in Norwich, and businesses feel many shoppers do not understand the benefits of buying local.
- While businesses acknowledge their dependence on each other, they need to work together more to promote the town centre as a whole 'ecosystem' of outlets.
- Despite the benefit for some businesses of local food being price-competitive, for others the recession has had a major effect and there is still a perception among some shoppers that local food is more expensive.
- Both outlets and shoppers perceive there to be a lack of availability of local food: the local food sector is largely 'hidden'. Considering the abundance of food grown or reared in Norfolk, more research should be done into the reasons for this.

Key recommendations

Local authorities

Norwich City Council should:

- work with local businesses and across the council to develop initiatives to foster and promote Norwich as a local food destination, such as a local food guide featuring outlets selling local food and the monthly farmers' market
- devote a section of the six-day-a-week market to local food
- strengthen the 'town-centre-first' policy in the Core Strategy and ensure it is enforced
- ensure the new foodstore in the Anglia Square scheme is assessed for its impact on the town centre
- review the draft Norwich Food Plan and work with Transition Norwich and East Anglia Food Link to explore ways to improve the food security of Norwich
- ensure local policies are sensitive to the fact that small changes can make a big difference to small food businesses that, as a whole, attract people to Norwich.

All public authorities – Norwich City Council, Norfolk County Council, the local education authority, schools and hospitals – should use their procurement policies and processes to buy more sustainable local produce, using the Public Services (Social Value) Act 2012[4], and educate staff and service users on the benefits of local food.

Local businesses

Local food allows local businesses to offer distinctive, high-quality produce with strong, positive messages about how and where it's produced. Businesses should:

- improve marketing of local food for its qualities, value for money and wider environmental benefits
- ensure labelling makes it clear where local food is from, marketing Norfolk or East Anglia produce
- work together to market Norwich as a local food destination, sharing marketing and deliveries
- support each other with challenges they share by creating an independent retailer group, perhaps as a sub-section of the Chamber of Trade and Commerce.

The community and individuals

Local people should:

- buy local food through local shops, farmers' markets and delivery schemes
- in places where you buy food, including your supermarket, ask where it comes from and how it is produced; give them feedback to encourage them to buy local
- shop widely to encourage a variety of businesses, especially those stocking local food
- join Transition Norwich and act on community initiatives to shape your food, such as Norwich Farmshare
- contact local planners and councillors to encourage them to support your local food web – you could start by sending them this report and asking them how they intend to use it.

LOCAL FOOD AND THE LOCAL ECONOMY

Benefits

Local food contributes to Norwich's economy in a variety of ways:

- supporting many varied jobs in retail, food processing and agriculture, and allied service industries
- enabling smaller traders to stand out by selling fresh, high-quality, traceable produce
- building a strong local business network based on trust and mutual support
- providing a route to market for food producers across the wider area.

Local food counts

Local food is a significant part of the food economy in Norwich and the surrounding area.

- Of the 58 outlets screened in Norwich (including butchers, bakeries, wholefood shops, delis, fishmongers, greengrocers, farm shops, convenience stores, market stalls, box schemes and a farmers' market stall) over four-fifths sold at least some local food.
- Over two-thirds of the outlets interviewed attributed more than half of their annual turnover to sales of local produce, and 85% had local sales making up more than a quarter of turnover.
- Turnover of local food outlets (based on interviews with 16 independent outlets and excluding box schemes) is from £5.7 million to £17.2 million* a year.
- Sales of local food across all the outlets screened in Norwich could be contributing over £10.6m* a year to their turnover.
- The independent food outlets interviewed in Norwich together serve from 15,500 to 41,000* customers weekly.
- The seven supply chain businesses interviewed have a combined turnover of £2.4 million a year. Based on this, turnover of over 150 producers, processors and wholesalers supported by sales into Norwich is estimated to be over £52 million* a year.

Local food supporting local jobs

- Independent local food outlets interviewed provide 90 full-time and part-time jobs. Sector-wide, local food outlets may be supporting 240 jobs in the city.
- Based on the seven local suppliers interviewed, which support around 50 jobs in the supply area, we estimate sales into Norwich could help to support 1,150 full-time and part-time jobs in the local supply chain, with many more supported at other trades servicing the local food sector.

Key figures

- **48** outlets identified as selling local food[5]
- Annual sales of local food:**£3.5-10.6 million***
- Jobs at independent outlets in Norwich selling local food: **90-240***
- Weekly customer visits to local food outlets: **15,500-41,000***
- **Over 150** suppliers sell through outlets in Norwich
- Annual turnover of suppliers supported by these sales: **£52 million***
- Jobs at suppliers: **1,150***

* Please note: lower figures in range are based on data disclosed; other figures marked * are derived by applying average (mean) calculated from interview data disclosed to total number of local food outlets/suppliers identified

Strong demand for local food

Most shoppers interviewed (84%) said they bought local food for a wide range of reasons, notably to support local businesses and local farmers, and for personal reasons such as quality and taste. Nearly 40% of their food shop by price was on local food.

Over half of businesses interviewed[6] reported a growing demand for local food amongst customers, with some coming to them specifically to buy local food. The business benefit of such demand was described by one supplier: **'we use local ingredients so it is easier to market to restaurants as a local speciality item'**. Most outlets reported that customers ask where the food they sell comes from, indicating an interest in provenance when choosing what to buy.

Local shops have a reputation for quality, freshness and traceability

Three-quarters of the businesses interviewed said the quality of their products is a reason customers use them, and that quality is one of the benefits of selling local food. One outlet noted that **'Norfolk has some of the best quality produce in the UK'**. Customers themselves highlighted the importance of quality: over half of shoppers questioned bought local food because of its quality.

Many businesses also mentioned freshness as a benefit of selling local food, with it being **'picked on morning of delivery'** and one supplier delivering on **'the day of harvest'**.[7] Freshness, of course, improves taste – a key consideration for 42% of shoppers who buy local food.

Advantages for business of selling local food

A quarter of outlets said people shopped with them to buy local produce. Outlets reported many advantages in selling local produce, from keeping money in the local economy through the **'recirculation of local revenue'**, to customer choice: **'customers prefer locally grown'**. One outlet summed it up: **'We get a lot of stuff from local suppliers. It's better for the town, it keeps the money in the same pots and so it is better for the local economy.'**

A mutually reliant web of businesses

A recurring theme of the research was that local businesses are strongly interconnected, through formal and informal means, in a mutually supportive web. Small businesses work easily together and benefit from functioning as a community. They understand each other's issues and recognise the need to support the local economy, with retailers providing support to the producers they depend on.

Suppliers mentioned the practical ways they support each other and other local businesses, such as:
- providing advice and support to new businesses starting up
- acting as a hub for local producers
- joint deliveries
- recommendations on new outlets to sell through.

Businesses commented that it is **'easy to network… everyone knows everyone else which is good for small companies'**. This brings wider benefits: **'100 small businesses are better for the local countryside towns and economy than one supermarket.'**

Having many small businesses close together means shoppers are more likely to make linked trips: two-thirds of outlets found that some shops **'draw people into the area'** and shoppers visit others while there. These outlets have a **'symbiotic'** relationship: **'one business complements others, far better than having just one shop in the area'**. A number of shoppers identified convenience as a reason for using supermarkets, but as one business said, with a network of complementary outlets close to each other **'customers can get all their products within one area much like in a supermarket but with individual shops with individual produce'**.

However, this mutual dependence can leave businesses vulnerable. In one local shopping area, the **'greengrocer, butcher, dairy have gone'** and **'as one folds, others around lose passing custom'**. This highlights the need for specialist traders in particular to support each other, and for local authorities to be sensitive to smaller changes that can have a significant impact on a wider network.

CASE STUDY: Robert Brand Fruits Norwich

Founded in 1911, Robert Brand Fruits has been trading in Norwich for 100 years and is the only remaining sole fruit and vegetable shop in the city. A family business passed down through five generations from father to son, it's run today by Robert Brand and his wife and son. After many years in the market place, it now trades from Anglia Square, a shopping complex in the heart of the city.

The business stocks and promotes a wide range of seasonal, locally grown fruit and vegetables, sourced from around a dozen farms and individual growers in Norfolk and on the borders of Suffolk and Cambridgeshire. Produce is collected weekly from growers, wholesalers and market traders, ensuring a regular supply of locally grown food. These trade relationships have been in place for decades. **'Where my grandfather used to trade with a local wholesaler, I now trade with his grandson,'** says Robert. **'We are all family businesses and we've been supporting each other for years.'**

These relationships have helped Robert survive the recession. **'If we were a start-up business we would have gone under by now,'** he says. **'But our networks of support mean that we can give customers the best deal and continue to get good quality supply.'**

Nevertheless, the recession has affected the business. **'Luxury items are not selling and so we've had to go back to basics of selling fruit and vegetables for a really competitive price,'** Robert says. **'The problem is that customers are watching their pocket more and transport costs are rising so I'm not sure how we close the gap.'**

'If no one comes through the door, then I'll be out of business and the whole chain is affected. So at the end of the day, we're all reliant on the customers to keep us going.'

Robert fears the proposed multimillion-pound makeover of Anglia Square, which is likely to see a major supermarket move in. **'We would never be able to compete and neither would most of the independent stores around here,'** he says. **'We can't have loss leaders like the supermarkets can; it has to be a viable business.'**

Supporting the local economy

There is also recognition of the need to support the local economy. Nearly half of all shoppers bought local food for this reason. Local food businesses in and around Norwich help retain a relatively high proportion of local spend within the local economy and underpin employment, particularly in the rural hinterland, by generating sales of goods sourced from local producers. They also support the local economy more widely: three-quarters of outlets and suppliers mentioned using local services such as accountants, solicitors and tradespeople, helping support many non-food-related jobs in the area.

Nearly half of all retailers in the study spoke of supporting local producers and **'pass[ing] money around locally'**. Some outlets describe the concept of **'fair trade'** as an advantage of selling local food, making an analogy with the Fairtrade mark[8] for farmers in developing countries. Fairtrade products ensure better prices, decent working conditions, environmental sustainability and fair terms of trade for farmers. Buying local produce either direct from producers or via small local outlets enables the same to happen informally in the UK: local producers can trade on relatively equal terms with local outlets to receive a fairer price or, by direct selling, can increase their income. This can help them stay financially viable and enable them to farm in more environmentally sensitive ways, without needing to increase the size of their business or to farm more intensively.

Convenience is key to attracting customers

A recognised part of the attraction of large food stores is their one-stop convenience. When we questioned shoppers, nearly half used a supermarket for their main shop because it was near to their home or work or convenient in other ways. But smaller local outlets can also be attractive to customers for proximity to home or work and their convenience. This is particularly so for top-up shopping: 37% used a local food shop for this because of 'proximity' or 'convenience'. As one such store notes, **'20% of customers are within a two-minute walk'**. Convenient access by public transport is also important for those without use of a car and town centre stores especially so for this reason. According to the Norwich Retail and Town Centre Study[9], shoppers do find the city centre accessible and, although only 9% of shoppers in the city currently go to the centre specifically for food,[10] it remains an important location for local food outlets since many people work there and can shop for food at lunchtime or after work.

Local food can keep costs down

For some businesses, stocking local food can help keep costs down. A quarter of outlets saw the low cost as an advantage of selling local food, and the ability to **'buy small quantities of fruit and veg'** was also identified as a benefit of buying local. For the suppliers interviewed all but one referred to price as an advantage of selling local food. Half mentioned lower costs for distribution, as well as the ease of distribution, and a **'better profit margin if selling locally'**. Members of a community-supported agriculture project felt it was **'providing excellent value for money'**, indicating that their model is showing resilience during a recession.

Challenges and barriers

Businesses and customers more sensitive to price

While some businesses saw price as a benefit of local food, over a third (seven outlets and one supplier) took the opposite view that local food is more expensive, or that shoppers perceive it to be.

Some businesses felt they were being undercut, either by supermarkets, overseas suppliers who were not subject to the same regulation as they were, or unregulated roadside traders. A number had been hit by the recession, as **'costs have risen significantly'**, customers **'buy lower-end products'**, they **'have lost customers due to the recession'**, and **'people are being a little bit careful with money'**. However, a couple of outlets mentioned that this was outweighed by growth in their business more recently, and one supplier had offset some of the impact thanks to improvements in energy efficiency reducing their production costs.

Three-quarters of shoppers interviewed do their main food shop at a supermarket, and many do so because they see supermarkets as cheap. Nearly half of shoppers stated they don't buy more local food because of the cost. One supplier felt that **'inside Norwich is very price-sensitive, whereas in the country people will pay a little more for better produce'**. Price competitiveness may be more of an issue in urban areas because there are more food outlets. Also, earnings in Norwich are low compared to regional and national levels; it is among the 20% most deprived local authority areas in the UK. Despite this, we found all income groups bought local food: it does not seem to be the preserve of the well-off.

CASE STUDY: Ronaldo Ices Ltd

In 1983, enterprising Norwich resident Simon Edye began selling ice cream that he'd bought in the supermarket from a homemade street barrow in Norwich city centre. But after taking a training course at Reading University, he moved into his own premises and starting making ice cream from locally sourced dairy produce, soft fruit and nuts.

From the start, Simon felt supported by the local food network. **'One of the things I loved about starting up the business was all the other local businesses that helped me,'** he says. **'Fruit farmers really went out of their way to give me the best fruit and to supply it in small quantities. Now, I'll do it for people starting up – giving advice, giving them a good deal. It makes sense as you earn a loyal customer.'**

Simon still trades from the beautifully painted street barrows in Norwich: **'They add character to the city and the home-made ice cream adds to the distinctiveness of the area.'** He sells around 70,000 cones a year, but much of his turnover is now from wholesale to around 75 restaurants, cafés and shops throughout the county. Selling locally offers many benefits: **'We use local ingredients, so it's easier to market the ice cream to restaurants as a local speciality item and it's costly to transport ice cream if you are travelling outside of Norfolk.'**

Sales of ice creams are inevitably seasonal, and are supported by tourism to Norwich and the Norfolk Broads in the summer months. The business employs 15 seasonal workers, as well as three full-time and three part-time permanent staff. For the winter, Simon has diversified into selling hot chestnuts from the street barrows in Norwich, which makes a significant contribution to his income in the low periods.

Ronaldo Ices has been affected by the recession, particularly in the costs of the raw ingredients. Simon has taken a long-term view, making the decision to **'put prices up gradually'** and work to reduce processing costs by **'investing in better equipment and improving energy-efficiency'**. He's recently installed a new cold room and an ice cream freezing machine. Although he is watching costs carefully, Simon points out that **'ice cream is not that expensive and people need a treat in the recession!'**

CASE STUDY: The East of England Co-operative: 'Sourced locally is miles better'

The East of England Co-operative Society, the largest independent retailer in East Anglia, has more than 200 outlets across the region in Essex, Suffolk and Norfolk. Annual turnover exceeded £330 million in 2012 and it employs over 4,700 staff.

Local sourcing began in 2007 with a handful of suppliers. In April 2011 it launched a new **'Sourced Locally'** brand for all its supermarket and food stores, with hundreds of products sourced from within 30 miles of individual stores. In the first year, the initiative was responsible for £7.1 million of a £7.9m increase in food sales sourced from local suppliers. In the past year (2012-13) locally sourced products contributed over £9.0 million to total turnover. While this represents around 2.7% of total turnover, this looks set to grow. The initiative is seen as a major success story with sales increasing by 28% last year and the Society is committed to sourcing a greater proportion of its food from local produce. The Society now deals with over 125 suppliers, stocking some 2,000 of their products.[11]

The Society has a twelve-point Sourced Locally pledge to underpin the initiative. This includes a clear 30-mile definition for local produce, supporting the regional economy, trading fairly, honestly and ethically with local producers, delivery of products direct to store where possible, encouraging suppliers in turn to use local suppliers where they can and educating customers and Society members on food provenance and the value of supporting local producers.

Sourced Locally ...IS MILES BETTER

The Society has supermarkets and convenience stores across Norfolk, all of which stock a selection of its Sourced Locally range. Over 40 businesses supply Norwich stores from within 30 miles of the city with a wide range of products including meat, seafood, dairy, fresh fruit and vegetables, bread, cakes, sauces, wines and beers.

'We put products into the store closest to the producer and this is often just a few miles, or in some cases much less than that, from our stores and where possible no more than a 30-mile radius,' says local sourcing manager Kevin Warden. **'When fresh produce is available it can be picked, packed and in the customer's shopping basket within a few hours.'**

Spotlight on local – Sugar beet

The first sugar beet crop in the country was grown and processed in the village of Cantley in Norfolk. A century on and the domestic industry is now worth £800 million a year. The county remains at the heart of the British industry, accounting for more than 60% of all sugar produced on home soil. British Sugar, which operates four sites in Norfolk and the East Midlands, contracts supplies from around 4,000 farmers every year, with the sugar beet travelling an average of 28 miles from farms to its factories. As beet is a heavy, bulky crop, transport can be costly, so processing plants are typically located close to farms. Despite much of the crop being produced on an industrial scale, farmers use sustainable methods where possible. Top leaves cut from the beet crop during the time of harvest are used to feed cattle and sheep or are ploughed back into the land as a natural fertiliser.

CASE STUDY: Pye Bakers, Norwich

Pye Bakers was set up by specialist baker 'Grimsby' and his partner Sally Miller in 2008 after sensing a gap in the market for high-quality artisan baking. The recession was just beginning, but they were **'confident that the quality of the product would make business sense'** – and have been proved right. The business now employs six full-time and two part-time staff, and supplies around 50 outlets, including greengrocers, pubs, restaurants and cafés with specialist breads, cakes and pastries.

All the retail outlets they supply are in Norfolk, with more than half in the Norwich area. Selling locally allows them to be flexible and concentrate on quality. **'We bake every day using fresh produce and deliver every day,'** says Sally. **'Selling local allows us an ease of distribution and a freshness of product and this appeals to customers. It is a real advantage.'**

They also sell directly at stalls at regular farmers' markets in Wymondham, Aylsham and Diss. The town councils make them feel welcome: **'You feel they want you to be there – the pitch is cheap and council staff will help you set up. We do two a week – it is good business.'**

Pye Bakers feel part of a local food network and maintain regular contact with other suppliers and retailers. **'Norwich is quite insular which is good for small companies – everyone knows everyone else,'** says Sally. **'Other local food suppliers will let us know if there is a new shop opening or a new farmers' market starting and we'll do the same. We all support each other.'**

Ingredients are sourced locally wherever possible – they have just changed to a local supplier of rapeseed oil – and they use a range of other local services, such as an accountant, plumber, electrician, printer and mechanic. They also re-use materials such as flour sacks and use no plastic packaging.

Lack of consistency and choice

There is a mixed picture when it comes to the supply of local food and whether this is a benefit or a challenge for Norwich outlets. Over a third of outlets had supply problems and wanted a **'larger variety of produce'** and **'a greater choice – over the last 20 years we've lost many suppliers'**. Some identified seasonality as the problem: **'seasons change and with that suppliers change and the supplies'**. Yet despite the fact that, as one workshop participant put it, **'we have become used to strawberries all year round'**, nearly 20% of shoppers who buy local do so because seasonal food is important to them: **'people come to understand the seasonal variation of food'**. Some outlets mentioned that people use their business because of the variety of produce on offer, including a **'good variety of products which are unavailable elsewhere'**.

Difficulties of scale

Dealing with lots of companies and small orders is a disadvantage of local food trading according to both suppliers and outlets. While mutually supportive, small businesses also suffer because of their size – many small local food businesses have **'no economies of scale'**. New large supermarket developments such as that proposed for Anglia Square to the north of the city centre could be destructive for small independent businesses; the retail assessment for the city as a whole did not address the impact of this.

However, smaller shops are important as incubators for new businesses. They provide a safe retail environment where suppliers can test and market their products, allowing them to build their brand before selling it more widely. Small businesses may also have an advantage as they can be more flexible and responsive in stocking and trialling new and unusual products.

Spotlight on local – Colman's mustard

Colman's, synonymous worldwide with English mustard, is one of England's oldest household brands and a key part of Norwich's heritage. The business was started in 1814 by a flour miller, Jeremiah Colman, at a site on the River Tas four miles south of Norwich. In 1866 it was awarded a special warrant as manufacturer to Queen Victoria. Today the factory is at Carrow, near Norwich. Although now a global brand, owned by multinational Unilever, the company remains committed to local sourcing, buying mostly from farmers in Norfolk. The company also established the Mustard Shop & Museum, taken over by the Norwich Heritage Economic & Regeneration Trust in 2009. This is located in Norwich's Royal Arcade and continues to be one of the city's most popular heritage attractions. It celebrates the history of mustard making in the region and sells locally produced chutneys, pickles, dressings and oils, as well as an exclusive selection of Colman's mustards.

Spotlight on local – Mint sauce

Around three-quarters of all mint grown in the UK is farmed in Norfolk. One variety with distinctly local roots – the Brundall mint first found in the village of Brundall on the Norfolk Broads – has earned its place in the national cuisine as the choicest variety for the production of mint sauce. Some of this is processed in Norwich and the wider county by small artisan producers, as well as by larger manufacturers such as Colman's.

LOCAL FOOD AND THE LOCAL COMMUNITY

Benefits

Personal, friendly customer service

Local food outlets take customer service seriously – three-quarters of outlets felt customers shop with them because of the friendly, personal, **'good service and polite attention**'. Some felt they provided **'better service than supermarkets'**. Businesses ensure that **'if there is a problem it will be dealt with'**. Workshop participants agreed: **'people selling are interested in a variety of subjects and are always interested to help'**, **'local stores are more willing to communicate'** and they provide a **'friendlier service [and] are generally more willing to discuss queries'**.

There are good examples of businesses that **'deliver to individual members of the community such as the elderly'**, providing a lifeline to some of their most vulnerable customers.

Customer loyalty is key

Many business said they were supported by the local community making word of mouth recommendations with one suggesting there is **'no need for advertising – name is spread by reputation'**. Nearly half of outlets stated that customer loyalty was important to their business. As well as good customer service, personal relationships and integrity help engender loyalty and, as most local food businesses tend to have a small number of employees, this can help staff and customers to form stronger relationships and build the trust and loyalty of their customers.

According to one retailer, **'Norwich has a …high number of people wanting to see independent shops thrive.'** This seems to be corroborated by shoppers who were interviewed: half of them bought local food to support the local economy and 20% did their main food shop in a local independent shop, or a mixture of independents and supermarkets. As one workshop participant pointed out, this loyalty **'retains spending power locally'**.

Part of the community

Some businesses specifically identified that they see themselves as **'part of the community'** – perhaps because, as one workshop participant said, **'there is less of a gap between producer and consumer'**. Half of outlets and some suppliers noted that they offer a place for the local community to gather and for **'people to congregate for a natter'**. One workshop participant summed up this notion: **'local food breeds sociability'**.

Around half of all shoppers mentioned supporting the local economy and supporting local farmers and producers as main reasons they buy local: for one workshop participant, **'my idea of local food is buying from small suppliers'**. This suggests that many shoppers who are buying local food are doing so because it supports their local community by supporting the businesses that are part of it.

Can buying local reconnect people with food?

People who buy local care about the food they eat. One in four shoppers (24%) said they buy local food for health reasons. As a lot of local food is raw ingredients that people cook from scratch, rather than ready-meals, customers know exactly what they're eating. Many shops reported that their customers ask questions on how to cook the produce or what recipes to use. A lot of shoppers too buy local for quality and taste reasons, and care more about these benefits than rock-bottom prices: **'price is not an issue as quality is important – [we want] good food'**. Local food outlets also provide shoppers with different and distinctive products: **'the market has things not available in supermarkets'.** One shopper was **'desperate to ensure that the huge supermarkets do not remove the wealth of choice we have of good quality local food**'.

Support for the community and local good causes

Large national stores often advertise their support for charities and good causes, but the extent to which smaller businesses do this often goes unnoticed. Half of businesses donated prizes to raffles and competitions for local charities, for example.[12] A small number of large businesses are unlikely to support as wide a range of smaller local charities, suggesting that local charities, community groups and good causes could suffer if local food businesses are lost.

Challenges and barriers

Awareness and marketing

Many businesses felt better marketing would help them sell more local food and support their business.[13] One supplier **'would like to do more [local sales], it is just finding the time to promote ourselves to retailers'**. Some outlets identified that many shoppers do not understand the benefits of buying local: **'better educated customers'** and **'promotion/public awareness of the advantages of local produce'** would help them sell more.

Small outlets don't have the marketing clout of larger stores. As one outlet commented: **'20 years ago people would shop here because the food is better. Now people are brainwashed into thinking supermarkets are better.'** The habit of visiting supermarkets was seen as one barrier to a greater understanding of and support for local food with **'changing public's attitudes re supermarket one-stop shopping'** seen to be necessary. Better marketing of local food and local shopping would help.

One in five shoppers don't buy more local food because of awareness issues. This is exacerbated by the fact that 11% of those interviewed don't know if they buy local food – a small but significant number that could explain some of the awareness problem. In the workshop it was said that **'national and industrial food systems separate people from how food is produced'**. For one workshop participant, **'outlets don't immediately spring to mind, only supermarkets. I don't know where these small places are.'** One way of making local shops stand out is **'growers bringing produce in to try things out/ sample produce'**.

Availability

While one shopper stated that **'Norwich is a good place to buy local food and there is a wide variety'**, a quarter of shoppers don't buy more local food because of availability or choice. However, according to our analysis, there is a high number of local businesses supplying food to Norwich.

This perceived lack of availability among a significant proportion of shoppers may be to do with other factors. Most shopping is done at supermarkets which typically have a very small number of local lines as a proportion of the total. Most outlets interviewed that do stock high percentages of local food were closed on Sunday and nearly all were shut by 6pm, mostly earlier, whereas the opening hours of supermarkets are much longer. The lack of marketing may also be a reason and, with many large-scale commodity farms in Norfolk, the large number of local producers that supply food into Norwich may be under the radar. One workshop participant felt that only a **'small percentage [of the food grown locally] gets sold in Norfolk'**.

Spotlight on local – Marsh samphire

Marsh samphire or glasswort flourishes in the creeks and on the salt marshes along the north Norfolk coast and has long been part of the local culture and cuisine. Locals still go out to pick this free seasonal delicacy during the short summer months when it is at its best. Though technically not a seaweed, samphire has a unique salty flavour and distinctive crunch. Local fishmongers used to throw it in free to customers purchasing their fish, though that tradition has all but died out. Although not widely available for sale, local samphire is still sold seasonally by some traditional fishmongers and specialist stores.

Supermarkets dominate grocery spend but there is demand and support for local[14]

Interviews we carried out with a range of shoppers at different locations in Norwich show the following:

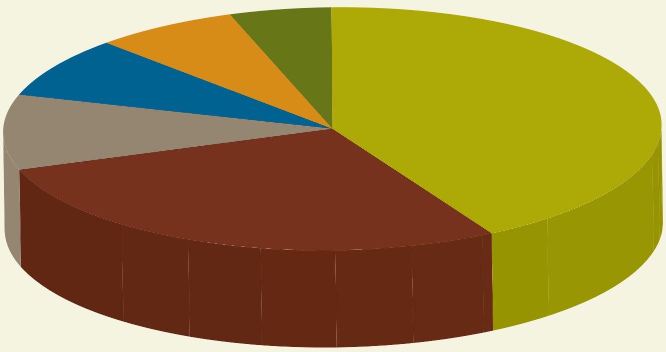
Q: Where do you do your main food shops and why?

- 75% of main food shopping was at supermarkets; top reasons were proximity (54%), convenience (31%) and price (25%).
- 12% of main food shopping was at Norwich Market and local independent shops; shoppers gave a range of reasons for using these including the availability of local, organic and Fairtrade produce; quality and freshness; and convenience.

Q: Where do you do any extra shopping for food?

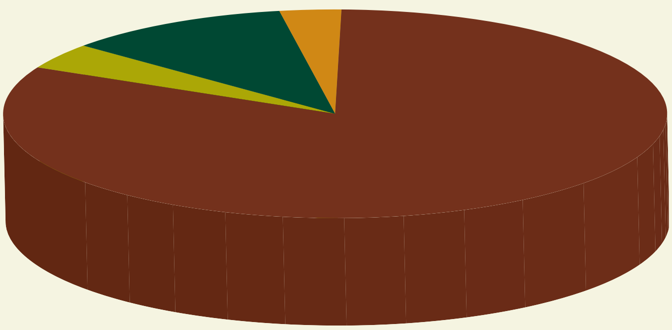
- 54% of extra food shopping was at local independent shops and markets; top reasons were proximity (41%), specific products (32%), quality and taste (22%).

Q: What do you understand by the term local food?



From the region	**42%**
From the county (Norfolk)	**28%**
From within 30 miles	**10%**
From a local shop	**8%**
From England	**7%**
Other	**5%**

Q: Do you buy local food? (based on local as produced within 30 miles of the store)



Yes **82%** No **4%** I don't know **11%** No answer **3%**

Q: If you buy local food what are the three main reasons you choose to buy it?

Quality	**51%**
Supporting the local economy	**49%**
Supporting local farmers and producers	**46%**
Taste	**42%**
Reducing food miles	**39%**
Health	**24%**
Seasonal food	**19%**
Value for money	**14%**
Reducing waste and packaging	**14%**
Protecting the local countryside	**11%**
Other	**8%**
Animal welfare	**6%**

Q: Why don't you buy more local food?

Cost or price (affordability)	**34%**
Availability	**18%**
Accessibility	**16%**
Awareness/information	**14%**
Other (labelling, not a priority, grow own, market timings, quality/choice)	**10%**
Convenience or time issues	**8%**

Q: How much do you spend on food per week and how much on local food per week?

Shoppers were asked how much they spent on food and how much they spent on local food each week on average.
The 99 shoppers who answered both questions spent an estimated £56 a week, of which 35% (£20) was on local food.

Analysis of the percentage of the weekly shopping spent on local food against household income shows these are not related: shoppers across a wide income range buy local food.[15]

As nationally, supermarkets capture the majority of grocery spend in Norwich. Shoppers cited convenience, price and the proximity of their location as main reasons they shopped at supermarkets. Nevertheless, local independent stores and Norwich Market are still widely used, accounting for around one in eight main shopping trips and over half of extra shopping visits. Shoppers visited these outlets to buy specific items, as well as for the range of local, organic and Fairtrade produce on offer. The quality and freshness of the produce at local, independent stores were also important to their appeal, alongside the proximity of their location.

Demand for local food was also strong, with the vast majority of shoppers mentioning that they do buy local produce. Shoppers also had a fair understanding of local food, with most shoppers either defining it to be from within the region or county: the region (East Anglia) in particular seems to have a coherent identity for people in Norwich. More than one in ten shoppers though were unsure if they bought local food or not, indicating scope for local food to be more clearly labelled and defined to raise awareness among shoppers of what is available.

Spending on local food accounted on average for around a fifth of shoppers' food budget, and as a proportion of total food spending, was not correlated with household income, suggesting that it is not a preserve of the wealthy. Shoppers bought local food for a host of reasons, in particular to support the local economy, farmers and producers, for its quality and taste, and to reduce food miles. The price of local food was, however, deemed a major barrier preventing people from buying more.

CASE STUDY: Norwich Farmshare

Norwich Farmshare is a co-operatively owned and run community-supported agriculture (CSA) scheme. The only CSA in Norwich, it was set up by the Transition Norwich Food Group in 2010. Funding from the Big Lottery Fund has supported the scheme in its first three years, with the aim to become self-sufficient over time. Norwich Farmshare initially rented five acres from a local farmer in Postwick and has now taken a further three acres to expand its rotation and its produce.

The Farmshare is modelled on an old market gardening system that used to be popular in Norwich and its hinterland decades ago, but became uneconomic with the intensification of farming practices. Board member Chris Hull explains that **'the CSA is making it economic again by having a simple distribution system, upfront membership payments and a high proportion of members helping out on the farm'**. Other farms in the area are watching the scheme to see its benefits.

The ethos behind the CSA is to bring the consumer and the farmer closer together, and this is a big reason why people are motivated to join. **'The scheme provides a really tangible connection between food, people and the land,'** Chris explains. **'It's a great feeling to know the whole chain and be part of it: from the seedling being planted to the produce coming into your saucepan. It's very similar to "grow-your-own", just that it's a farm!'**

It has taken time for the Farmshare to develop a core of members but now over 90 people, mostly Norwich residents, are signed up. As well as the freshness and quality of the produce, there is a social aspect to the Farmshare that attracts members. **'We find there is a sharing of knowledge between members – planting advice, composting tips, recipe swapping,'** says Chris. **'As it is seasonal vegetables, we have to adapt our cooking habits, putting us more in touch with the climate and nature.'**

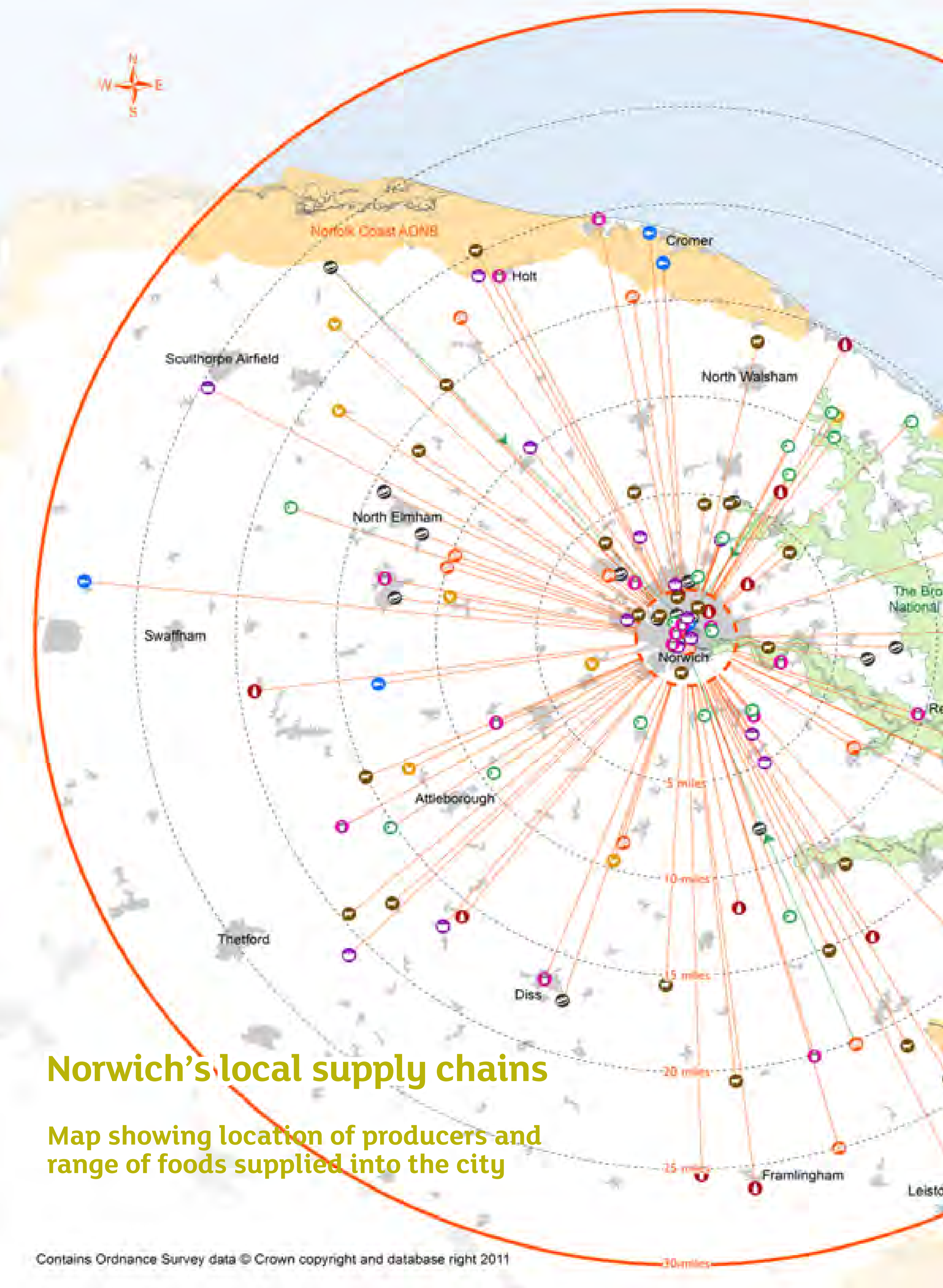
Vegetables are delivered to a 'Food Hub' in the centre of the city once a week for members to collect, meaning that transportation costs are shared. While the scheme gets established, the CSA plans to use another local organic grower to supply extra vegetables in lean periods.

The scheme is an excellent example of environmental stewardship, replenishing the fertility of agricultural land, growing organically and using little mechanisation. Hedgerow boundaries are being replanted, honey bees are kept in hives and the farm is attracting new wildlife. **'We like to think that it's a completely localised system – we are keeping agriculture going, keeping land fertile and promoting wildlife,'** says Chris. **'It protects the distinctiveness of our countryside.'**

Spotlight on local – Baker's of Norwich

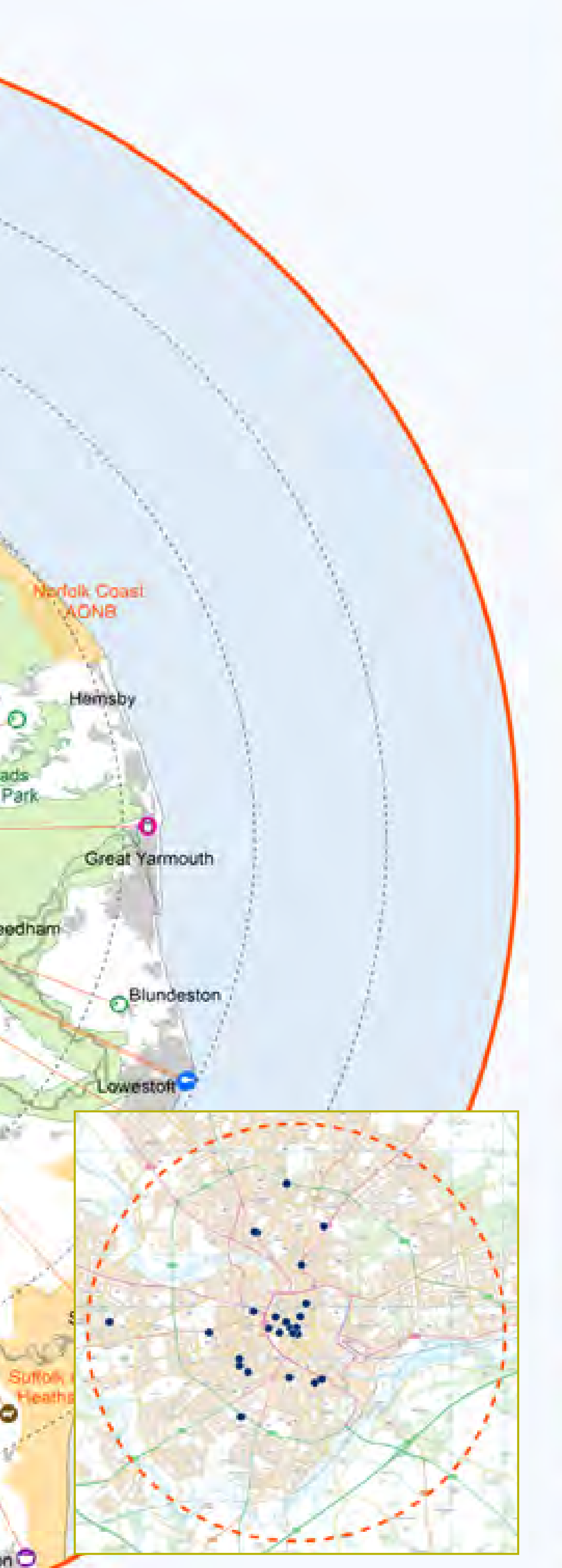
Baker's of Norwich – not a bakery but a traditional family butcher's stall in Norwich Market – has been trading since 1926. They now serve from 300 to 600 customers a week. Phillip Baker, who took over the stall from his father, strongly believes in keeping the business going as much for family tradition as for profit. Phillip enjoys chatting with the customers and takes extra pride in serving the elderly, delivering to OAP homes for free.

Being a local butcher has particular advantages in Norwich. Phillip finds that sourcing locally reduces transport costs and increases the quality and freshness of the meat. Norfolk and Suffolk are very good sources for nine months of the year for beef and lamb and are also excellent for producing pork. Phillip has established long relationships with most of his suppliers and can identify many of the animals individually. Unfortunately over the last 20 years he has lost many local suppliers as smaller producers have found it increasingly difficult to compete against larger ones. As Phillip notes, over 1,000 cattle used to be sold at Norwich's livestock market, but numbers have declined and this has reduced choice and quality.



Norwich's local supply chains

Map showing location of producers and range of foods supplied into the city



Norwich's core study area and location of main local food outlets

Local products typically supplied into Norwich

Meat	Beef, chicken, duck, game, goose, lamb, pheasant, pork, turkey, venison
Processed meat	Bacon, hams, lamb burgers, pâté, salami, sausages, smoked duck
Fish/ Shellfish	Cod, crab, Cromer crab, hake, herring, lobster, mackerel, mussels, oysters, plaice, prawns, skate, smoked fish, smoked trout, smooth hound[16], sprats
Dairy	Cheese (including Binham's Blue, Norfolk Tawny, Norfolk Dapple, Wareham and Wighton), cream, ice cream, milk, yoghurt
Fruit	Apples, dried fruit, gooseberries, nuts, pears, plums, raspberries, soft fruit, strawberries
Vegetables	Asparagus, beans, cabbages, calabrese, carrots, cauliflower, herbs, dried and fresh mushrooms, onions, potatoes, pulses, root crops, salads, samphire, spinach, tomatoes
Eggs	Eggs, free-range eggs
Preserves	Chilli sauces, chutney, dressings, flavoured salt, goose fat, honey, jam, mayonnaise, mustard, oils, pickled courgettes, pickled onions, pickled samphire, rapeseed oil, sauces, soups, vinegars (fruit and cider)
Drinks	Apple juice and cider, ale, bitter, mild, porter, stout
Baked goods	Bread, cakes, croissants, meat pies, pork pies, quiches, sausage rolls
Cereals	Bran, flour (all types including spelt), grains, muesli
Other	Condiments, chocolates, hand-cooked crisps, seeds, sweets

Key

- Boundary of core study area
- Boundary of local food supply area
- Settlements
- Supply chain links
- Area of Outstanding Natural Beauty (AONB)
- Multi-stage supply chain links (samples)
- National Park

Local food producers/ suppliers

- Meat/processed meat
- Dairy
- Fruit/vegetables
- Eggs
- Fish/shellfish
- Drinks
- Preserves
- Baked goods
- Cereals
- Other products

LOCAL FOOD AND THE LOCAL ENVIRONMENT

Benefits

Food miles count

The term 'food miles' is used to describe the distance between where food is grown, bred or produced and where it is consumed.[17] A quarter of the local food businesses mentioned cutting food miles as an environmental benefit of local food. Some also identified travelling less to distribute their products as a cost benefit: **'travel/transport is expensive so sourcing locally is cheaper'**. Businesses in the food web ensure that customers can find food that has not travelled unnecessarily: many suppliers to the businesses we interviewed in Norwich were less than 20 miles away.

Over a third of shoppers who bought local food indicated that 'reducing food miles' was a main reason they bought it. Also, the fresher the food is when sold to customers, the longer they have to use it, which could help to reduce domestic waste.

One complication with food miles is where the producer does not supply direct to the outlet, but goes through a hub that may be outside the 30-mile local supply area: it is not always possible to calculate food miles simply by looking at where the product originated. Supermarkets tend to favour this model as an efficient way of distributing food to many shops, but it can mean even local produce leaving an area for a central depot then returning when distributed to each store. More truck miles will lead to more air pollution, congestion and local environmental disturbance. One workshop attendee said they were **'not as keen on large supermarkets' "local" food that causes a lot of food miles due to centralised despatch centres'.**

A further complication is that lower food miles do not always mean lower greenhouse-gas emissions: for example, hothouse tomatoes *grown out of season* in East Anglia may have a higher carbon footprint than outdoor tomatoes from Spain. Nevertheless, the concept resonates with shoppers and businesses, and helps to connect people to where their food comes from. At the moment there is no widely adopted and trusted label to help shoppers to understand the wider environmental impact of the food they buy, including its transport. Until this becomes available, buying seasonal local food, in particular from independent outlets, can be a practical and straightforward way for people to choose to reduce their own impact on the environment.

Businesses use a number of techniques to reduce their environmental impact

When asked about environmental initiatives, many businesses reported using energy-saving measures, including low-energy and energy-efficient equipment, secondary glazing and purchasing green electricity.[18] One supplier added that they are aiming to **'reduce electricity costs by a half to two-thirds'** with small-scale wind turbines.

Three-quarters of businesses we spoke to seek to reduce, reuse and recycle as much as possible. When it comes to reducing waste:

- nearly half in particular look to reduce packaging or the impact of packaging
- half of retailers mention reducing plastic bag use by encouraging customers to use their own bags and selling reusable bags.

Interestingly, the cosmopolitan nature of the city helps to reduce food waste: one butcher mentioned that **'the local Asian community buy a lot of the less popular, more traditional cuts such as pigs' trotters'.**

Shoppers appreciate the environmental efforts businesses are making: 14% mentioned reducing waste and packaging as a reason they buy local food.

Protecting wildlife

Many producers talked about how they help protect biodiversity through maintaining hedgerows, **'plant[ing] and maintain[ing] varied flora and fauna'** and signing up to stewardship schemes. There are business benefits too: one chicken farmer has planted 3,500 trees, which **'provides a better environment for the chickens and shelters the shed'.**

Local character and a sense of place

Norwich has an attractive, compact centre, is the only city in the county, and is the main urban area close to the Norfolk Broads. It is no surprise that it attracts many tourists, which some outlets find beneficial for business. Part of the attraction is the historical nature of what was once England's second city[19], with **'historic shop[s] with years of tradition'**. A number of outlets (six) particularly identified the historic character of the city as a benefit – the whole of the city centre within the medieval walls is a conservation area,[20] and by keeping old buildings in use local outlets help to maintain the character of the city.

The distinctiveness of Norwich city centre was noted by a quarter of businesses and was also commented on at the workshop: **'Norwich very much has its own distinctive character'**

Local planning policy recognises the character of the city. The draft Development Management Policies[21] note the importance of distinctiveness: 'Norwich needs to build on its strengths and promote local distinctiveness through high quality design.' The draft City Centre Spatial Strategy[22] maps out aspirations for an accessible, attractive and liveable city centre – well-supported food outlets could contribute to this.

CASE STUDY: Norwich Food Plan

'Could Norwich feed itself?' That was the question posed by the Norwich Food Plan, a 2009 report by East Anglia Food Link and Transition Norwich that looked at the sustainability of local food systems for the city. It found that, with changes to land use, farming practices, diet and the distribution of food, the population of Norwich and its hinterland could be fed from within six miles of the city centre.

The report illustrated that there is enough land available to grow food but that much more would need to be released to enable small-scale production, rather than for housing and other development. Individual growing, allotment schemes, market gardening and community-supported agriculture would need to become established features of the city and part of our everyday livelihood and communities. The report also found that radical changes would need to be made to our diets, moving away from meat and dairy produce (which take far more land to produce and are more carbon-intensive) towards fruit, vegetables and grains.

The two organisations are developing a number of pilot projects to demonstrate the potential for more resilient food systems:

- Community-supported agriculture – see the Norwich Farmshare case study above
- The bread project – establishing a local supply of organic wheat, buying a local mill and supplying flour to artisan bakers and retailers in Norwich
- The beans project – researching varieties of beans and lentils that can be grown by organic farmers in the area for supply to wholefood shops in the city
- The oats project – investing in processing equipment for locally grown organic oats.

Challenges and barriers

Access to local food may be an issue

With an urban area the size of Norwich, city-centre retail focuses on non-food goods. Two-thirds of the shops screened as selling local food are outside the city centre. A third of Norwich residents don't have a car[23], so need to be able to access local food on foot or public transport. This highlights the importance of a diverse range of smaller food shops in district and local centres close to where communities live if people are to have a good choice of where to shop and easy access to food.

Some shoppers and workshop participants linked local food to farm shops and identified the difficulties in getting to these: **'farm shops are not in reach by foot'** and the **'down side to farm shops is often their location necessitates a car'**. Although local food was seen by many as reducing food miles because the distance from farm to shop is reduced, the environmental impact of the location of some outlets was highlighted: **'growing local is insignificant [compared] to people using cars to drive... need to change all aspects of people's lives'**. Of course, out-of-town superstores also encourage car use for shopping and by causing the closure of smaller local food shops can reduce access and choice for those who don't drive.

Our research has shown that there is strong availability of local food within Norwich, even for those who can't or don't want to drive to farm shops. Perhaps the issue is more a lack of awareness than a lack of access.

CASE STUDY: Norwich Market

With nearly 100 traders selling everything from food to clothes and electrical goods, Norwich Market is the largest six-day open market in the country. It is also one of the oldest, having been in operation as far back as the 11th century. It remains a defining feature of the city, meeting local needs as well as attracting tourists.

Around a third of the stalls sell food including a selection of local, seasonal and artisan produce. However, with fierce competition from supermarkets and changing shopping patterns, the number of food stalls has steadily dwindled over the years. In 1979 fruit and vegetable stalls occupied 70 of the market's 205 stalls, but are now reduced to only five. The decline in market gardening is also to blame, with few if any stall holders now selling their own produce.

Food stalls also rely on one another to draw business, enabling customers to do most of their grocery shopping at the market. There is a real sense of community among the traders and customers. One trader describes working on the market as like **'being part of one big happy family'**. So far this has allowed the market to survive competitive pressures and match the convenience offered by supermarkets. But if too many of the food stalls close, it is likely to undermine trade at neighbouring stalls. Many stalls have though adapted to changing times, diversifying into specialist foods, clothing and other goods but, as one trader noted, the market is **'only beneficial if there are enough outlets of the same quality and with good range'**.

Rents on the market also affect the viability of small traders. When the leases on the stalls were renewed after 25 years, the council raised rents significantly and started to charge for areas that had previously been free. Consequently many long-term stallholders were forced to pack up. Supportive rents and wider policies, including general upgrading, toilet facilities and better marketing, will be critical to preserve and strengthen the vitality of the market.

LOCAL FOOD AND LOCAL POLICY

Local authority planning policies – strengths and opportunities

Norwich City Council has responsibility for planning in Norwich but has worked with Broadland and South Norfolk councils to develop a Joint Core Strategy (JCS) to guide development in their combined areas. This was adopted in March 2011, but was amended in autumn 2012 to address a legal judgement earlier in the year.[24] For the Norwich area, the Northern City Area Action Plan guides new development in the relatively deprived northern edge of the city. Until the Development Management Policies and the Site Allocation Plan are adopted (both submitted to the Secretary of State for independent inspection in April 2013), many of the policies in the Norwich City Local Plan 2004 are still in use.

The JCS supports the local food web, in particular through strong town-centre-first policies:

- Policy 5 outlines support for the promotion of farmers' markets, farm shops and cottage industry as well as development of a food hub to promote and develop the regional food market and rural economy in Norfolk.

- Policy 11 identifies the city centre as the main focus for retail with intensification of the primary retail area proposed if necessary. It aims to enhance retail, particularly the character of specialist retailing areas and markets of other parts of the centre. Policy 12 also aims to retain and improve local and district centres. The JCS also confirms that there is no potential for additional out-of-centre retailing, so protecting the city and district centres.[25]

- The whole of the city centre is a conservation area, so helping to protect its historic buildings and distinctiveness, and attracting people to shop there; Policy 11 seeks to enhance the distinctive character of the city which the conservation area supports.

- Policy 19 outlines a hierarchy for new retailers: 1) city centre; 2) two large district centres (Anglia Square on the northern and Riverside on the south-eastern edges of the city centre); 3) further district centres. This is important as it identifies the importance of centres around the city centre as well as the centre itself, ensuring they have a retail mix and good food provision.

- For the district centres, current draft Development Management Policies for Norwich will require impact assessments for developments above a certain size threshold, which is lower than the national average (for district centres:1000m^2 gross internal area; for local centres: 500m^2 gross internal area).[26] These policies also require the scale of new retail developments to be appropriate to the centre's position in the hierarchy and not to conflict with overall sustainable development criteria in policy DM1 which include 'minimising the overall need to travel, reducing dependency on the private car and high-emission vehicles and ensuring ease of access to facilities and services for all users both now and in the future'.[27]

The development of the JCS was supported by a Retail and Town Centre Study carried out in 2007, which identified 1,100 shops and 229,000m^2 of retail floorspace (mostly non-food) in Norwich city centre. Food floorspace was lower than the national average, with 55% of it on the edge of the centre at the Morrisons and Sainsbury's superstores, but retailer demand for new food units was low. The study showed that district centres were performing well and met the needs of local people.

Riverside is a large mixed-use development of leisure, housing and retail on brownfield formerly industrial land near to the railway station and river about half a mile to the south east of the city centre.[28] It is defined in the JCS as a large district centre. The retail study highlighted that the Riverside development had been mainly attracting car-based shoppers, and was not well integrated with the city centre. This is reflected in the draft Development Management Policy DM18, which says there should be no further retail development at the site unless links with the city centre and other local centres are improved.[29]

A number of saved policies in the Local Plan are used alongside the JCS, and will be a planning consideration until the Site Allocations and Development Management Policies come into force in 2013:
- The Local Plan has a general retail policy of restraining the growth of further large shops. It outlines the need for developers to allow flexibility for sites to accommodate different aspects of a proposal rather than one inseparable unit
- Policy SH03 confirms the retail hierarchy and only allows developments of appropriate scale and where they have no detrimental impact on the vitality and viability of retail in the area
- Policy SH20 allows additional small markets such as farmers' markets.

The Northern City Area Action Plan outlines proposals and policies to regenerate this area. Compared to the city centre, the area has higher unemployment, lower health outcomes, a higher social rented sector, limited open space and higher retail vacancy rates, particularly for Anglia Square. The plan aims to strengthen the area's local distinctiveness from the city centre. It also aims to improve the shopping offer, including a range of small independent shops. The sustainability appraisal, which is also a statutory development plan document, suggests that for the redevelopment of Anglia Square, the plan should 'ensure that the food store is not overly large as this would result in a wide catchment area. This would be unsustainable and would create local traffic problems.' It also suggests that the council should 'seek to agree with the food store operator to use local supplies and services'. This should be included as a planning condition for the site.

The Norwich City Council Environmental Strategy aims to 'green' the council's approach to procurement, including creating an eco-procurement guide and establishing a pre-tender sustainability checklist.

Local authority planning policies – weaknesses and threats

The policies in the existing plans have potential to support strongly the existing city, district and local centres and the retail diversity that underpins the local food web. However, there are opportunities to strengthen policies to lend better support for local food provision in the city and surrounding area:

- Nothing in existing or proposed policy directly addresses the issue of local food. Transition Norwich and East Anglia Food Link's Norwich Food Plan could have been used to inform the JCS and other policies, but none of the local authorities have yet provided a response or comment.

- National planning policy recommends that local authorities should 'retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive'.[30] While there is support for farmers' markets there is no policy to support the city centre market; Policy SHO19 of the Local Plan around supporting Norwich Market has not been saved.[31]

- The sustainability appraisal is poor on measuring the environmental and social performance of the economy: its only social indicator is Investors in People, and the only environmental indicator is sustainable energy; given the relevance of farming to land use and of the food system to sustainability through transport, energy and waste, aspects of the food system should be incorporated as indicators.

Local authority procurement policy

The new Public Services (Social Value) Act 2012, while focusing in particular on social enterprises, aims to make the concept of 'social value' more important in the provision of public services. Food businesses that provide social value – and, as this research shows, many do – should be supported to provide services for the public sector. The Act also requires local authorities, when entering into public procurement contracts, to give greater consideration to economic, social or environmental well-being during the pre-procurement stage.

Although the Norwich City Council Procurement Strategy seeks to help local businesses bid for work by advertising locally, it does not take any other steps to make bidding for council work easier for small businesses, such as breaking large contracts into smaller lots, providing free training for tendering aimed at SMEs or providing help with consortia working.

RECOMMENDATIONS TO STRENGTHEN THE LOCAL FOOD WEB

The recommendations below reflect issues identified in the Norwich research as well as CPRE's views. They may apply elsewhere depending on local circumstances. Recommendations for national Government are the focus of a national report *From field to fork: The value of England's local food webs* published in June 2012.

What are the issues?	Why does it matter?	What needs to be done and how? By local authorities	By businesses	By community groups and local people
Local food may cost more or is perceived to be more expensive Smaller outlets can struggle to compete in the recession	Supermarkets attract shoppers by competing hard on price and advertising low prices The cost of 'attractive' offers may be passed back to producers by large retailers and can undermine producers' business		Persuade shoppers local food is affordable: - advertise where prices are the same or lower than at the chains - emphasise value for money and the quality, taste, freshness and goodness as well as customer service - persuade customers to buy better quality but less quantity – eat less and eat better but pay the same - sell 'ugly' fruit and veg at lower prices - ensure local staple food is labelled as such so shoppers can see that it is not only 'luxury' food that is local: an everyday shop can be full of local food	Set up a buying group/ food co-op to bulk-buy fresh, locally produced food[32] Keep checking prices in local shops and markets against the supermarket; they are often cheaper, especially in season, so choose local when you can Pay a little more for better quality food but buy less of it to stick to your budget
Smaller outlets with smaller margins and less time and money for marketing often find it hard to compete against larger stores Smaller businesses do not have the advantages of economies of scale that large outlets do	Competition is weakened if the network of diverse small businesses can't compete with large national chains Shoppers need to know what is available, where and at what price to make informed choices Costs are higher for smaller businesses Shoppers may do all their shopping in one store leading to further loss of small shops	Public procurement officers can increase opportunities for small local producers by: - setting specifications and assessment criteria for the freshness, seasonality and frequency of delivery of produce - training staff on how to get the best from catering contracts - splitting larger contracts into lots, for example into product groups or by distribution area - advertising opportunities to local producers through the competitive tendering process[33] In developing their eco-procurement guide, Norwich City Council should include help for small businesses to bid for council contracts, such as breaking into lots, providing free training for bidding aimed at SMEs or providing help with consortia working Work with businesses to set up a reward card scheme[34], to entice customers to shop in independent outlets in Norwich city centre	Formalise known business networks/form a business co-operative for independent outlets to work as a whole to share the costs of promotion, marketing and delivery: maintain distinctiveness but bring down costs Talk to Taste of Anglia about the service they provide	

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<tr><th rowspan="2">What are the issues?</th><th rowspan="2">Why does it matter?</th><th colspan="3">What needs to be done and how?</th></tr>
<tr><th>By local authorities</th><th>By businesses</th><th>By community groups and local people</th></tr>
<tr><td>Norwich could do more to market itself as a local food destination</td><td>There is an opportunity to market the town as a whole to shoppers, not just let them be drawn in by a supermarket and only shop there</td><td>Work with food businesses to develop a Norwich local food guide – linking countryside with city (e.g. recommending visits to producers that supply particular outlets). Nearby Broadland has such a food directory[35]

Work with businesses and the local community to identify what local means to them – county and regional identity seem to be strong in Norwich</td><td>Outlets could highlight local produce, perhaps identifying the food miles on the price label so customers have a tangible idea of how local the product is

Hold ‘meet the producer’ events in stores so customers can find out more about the food they are buying

Work with local organisations to sponsor and promote a local food awards scheme</td><td>Community groups could research and write a local food guide to help residents and visitors find outlets where they can buy food that’s local to Norwich

Use websites such as Big Barn to find local food near to home (www.bigbarn.co.uk)

Tell others about the benefits of local food and where they can buy it; spread the message</td></tr>
<tr><td>Consistency of supply is a problem for some retailers</td><td>Local food is seasonal and products aren’t available all year round

Small businesses face logistical challenges</td><td>Work with partners to develop a food hub for Norfolk, as set out in the JCS, and ensure it supports small businesses as originally envisaged[36]</td><td>Market the idea of buying seasonally so shoppers understand at what time of year you can get various local products

Work together to organise events where outlets and producers can meet and form new business relationships

Develop the proposed food hub for Norfolk</td><td>Plan recipes based on food that’s available and in season</td></tr>
<tr><td>New large supermarkets – like the one proposed for Anglia Square – could pose an added threat to small stores and distinctiveness

Norwich needs to foster its distinctive character and avoid becoming a ‘clone town’</td><td>There is a challenge for retail to be distinctive, especially around food, when Norwich is a city with focus on major a chain and department stores</td><td>Investigate the potential for small food retail to add variety and distinctiveness to the Northern City area of Norwich

Introduce a policy into the Local Plan to support and develop Norwich city centre market</td><td>Market the city as being capable of meeting all shopping needs – e.g. produce a leaflet/ website showing a shopping basket, and list the shops in town which can provide each item</td><td></td></tr>
</table>

What are the issues?	Why does it matter?	What needs to be done and how? By local authorities	By businesses	By community groups and local people
Despite lots of local food in the area, availability has been identified as an issue	Most people buy local food: what stops some from buying more is availability Unlike supermarkets, small businesses often cannot afford to open long hours	Make improvements to Norwich Market by having a more clearly labelled and marketed local food section, supporting current traders and new local food retailers Work with Transition Norwich and East Anglia Food Link to review and implement their Food Plan	Investigate working together to provide weekend and evening deliveries Also working together, look at e-commerce options, e.g. a shared website for ordering from independent retailers in the city, either to pick up from the shop or as part of the delivery service	Explore other ways to shop conveniently for local food: - use a local box scheme to get fresh, seasonal local fruit and vegetables and other foods delivered to your door - ask local stores if they deliver - ask your supermarket to stock more local lines
Sustainable local food networks need strong support from the public, civic society, businesses and government at all levels	Market forces are stacked against small, independent local food businesses, threatening the wider economic, social and environmental benefits they bring	Work with business and community organisations interested in local food to have a public debate about food in the city and develop a local food strategy and action plan for Norwich, looking at local, healthy, accessible, affordable and fairly traded food Local Plan policies should: - recognise the mutual dependence between the city and its retail diversity and the health of rural businesses, especially for innovation and development of small and medium-sized food businesses - consider making it a planning condition for new supermarkets that for example 10% of the food they sell should be local, starting with the Anglia Square development as outlined in the sustainability appraisal of the Northern Area Action Plan		Try a 'local to Norwich' or Norfolk diet for a month, sourcing produce from a 30-mile radius; for ideas look at the Fife Diet website[37] Shop and cook seasonally using local food as a guide; get a seasonal cook book Join Transition Norwich and take action to take control of your food supply Get involved with any consultations on how the Local Plan for your district and your Neighbourhood Plan are developed Contact your local planning authority and your local councillors to bring the findings in this report to their attention. Ask them to show strong support for your local food web in their policies

CONCLUSION

Norwich is a regional city with a population of around 195,000. The city centre and surrounding districts and local shopping areas remain relatively distinctive with a good mix of 'traditional' independent outlets including greengrocers, butchers, delicatessens, the largest six-day-a-week market in the country, a monthly farmers' market and convenience stores. The range of outlets enhances the vitality and character of the town, which helps attract visitors. As much food is bought in local shopping areas outside the city centre, further analysis of this using the food mapping methodology would be beneficial.

Much food at these city centre outlets is sourced locally from over 150 producers in the area. The local food supply area, largely made up of Norfolk, has a healthy network of food producers. Many of these are smaller farms that provide food directly to the communities in Norwich and other parts of the region. This local food web effectively runs in parallel alongside the large-scale commercial farming for which the area is well known and which produces commodities such as sugar and grain for national and international markets.

The food web provides multiple benefits to the city and its hinterland. It offers the people of Norwich good quality, fresh, traceable food, for which there is a demand. Businesses support the community through supporting local good causes, and in turn local people are loyal to businesses they see as part of the community. The businesses also contribute to environmental protection, and the character and sense of place of Norwich.

The community-based research we report here illustrates the scale of the local food web and how it benefits the city and the area.[38] Action is needed to ensure this web survives and can grow and thrive in the future. While there is a demand for fresh local food in Norwich, there is a danger that small independent outlets in the city centre and surrounding districts, which provide the main outlets for local food producers, will struggle to compete with larger supermarkets.

The earlier Local Plan and the new Joint Core Strategy contain a number of policies that support the local food web and the local economy, but which we suggest should be stronger. Working with the community to develop a local food strategy that supports local food businesses and community action around this would focus any future planning policies on developing support for this vital sector. Additionally, procurement policy should be geared to developing a stronger, more sustainable supply chain by creating opportunities for smaller local producers to tender for contracts. These measures could also serve to develop Norwich's relationship with its rural hinterland through its food supply.

The public sector, local businesses and the community can also strengthen the local food web by working in partnership to make it easier for small independent outlets to network, and by promoting Norwich as a complete food shopping destination, with many shops providing a variety of products to meet everyday food shopping needs. Those who wish to get more actively involved could join and build new initiatives through Transition Norwich and East Anglia Food Link. Businesses could promote local produce better, building on the food networks that do exist and working together on marketing and accessibility. Lastly, shoppers in Norwich can do much to support their local food web in simple ways such as by asking where their food comes from, seeking out shops which sell local food and buying more seasonal local produce.

APPENDIX A
Information about the area

The cathedral city of Norwich is the largest population centre in Norfolk, and one of the largest in the East of England region.

History
Norwich started as a small Saxon settlement just north of the river Wensum. By the 10th century it was already an important town with a mint and weekly market. By the Middle Ages Norwich had become one of the largest towns in England, and a key religious centre, with more churches than any city in northern Europe. It remains a historic city with around 1,500 national designated listed buildings and 17 conservation areas.[39] Weekly markets and an annual fair helped make Norwich a major centre, with trading links from Scandinavia to Spain. Norfolk was also pivotal in the agricultural revolution, with land owners pioneering revolutionary techniques such as crop rotation.

Local government
Norwich City Council is the local planning authority for the city. Other district and borough councils such as Breckland, Broadland, South Norfolk and Waveney are responsible for spatial planning in the wider area. Norfolk County Council and, for a small part of the supply area, Suffolk County Council have responsibility for issues such as education, highways and planning for minerals.

Culture
The area hosts many festivities, including the Norfolk Food Festival, which celebrates the area's produce; the Royal Norfolk Show, the largest two-day agricultural show in the country; and the Norwich Beer Festival. In addition, Cromer and Sheringham on the North Norfolk coast host the Crab and Lobster Festival.

Geography and land use
The study area includes the Norfolk Broads National Park and many unique geological features from the ice age. It also covers parts of the Norfolk Coast and Suffolk Coasts and Heaths AONBs, including wildlife-rich wetlands, ancient heaths, windswept shingle beaches and historic towns and villages. Because of its flat topography, silty soils and temperate climate East Anglia is an important area for agriculture, particularly cereals: 58% of the UK's most productive agricultural land is found here.[40]

Economy
Norwich's retail sector generates £1.17 billion turnover per annum, the highest level of retail consumer spend in the region.[41] Norwich has the highest proportion of retailing in its centre of any major city in the country.[42] The Norwich Lanes, with their cobbled streets and narrow alleys, have one of the UK's best selections of unique and independent shops. Norwich's ancient market place, established in the 11th century, now holds the country's largest six-day-a-week market with nearly 200 stalls. There are a number of department stores, including Jarrold, the city's only independent department store. High-street chains and supermarkets are
also present.

Sainsbury's has the largest shop in the city centre and a large Morrisons is located by the train station, while smaller supermarket shops such as Marks & Spencer, Tesco and Iceland are dotted around the central areas. Recently Tesco opened an Express store on Unthank Road after seven years of opposition from local residents. The council has approved the redevelopment of Anglia Square, a once-prosperous commercial area now in decline, which will see office blocks and shops replaced with a shopping centre, including a supermarket and restaurants, and 136 new homes.[43]

Norfolk feeds many parts of the UK as well as exporting a large quantity of cash crops and produce: nearly a third of the UK's sugar crop comes from Norfolk-grown sugar beet; three-quarters of mint grown in the UK is from Norfolk; Colman's mustard in Norwich sources all of its white mustard seeds from East Anglia; and half of all turkeys in the UK are reared in Norfolk. Despite this, for the Greater Norwich area, the number of people employed in agriculture is comparable to national and regional figures.[44]

Population
Some 72% of Norwich's population is of working age (16-64), higher than the national average (64.8%). Of these, 77% were economically active (either employed or seeking work), just above the national average (76.5%). Average earnings by residence (gross weekly pay for full-time workers) are at £452.10, 15% below the regional average (£528.50) and 10% below the national average (£503.10).[45] Some 11,000 people live in areas that are considered among the most deprived 10% in England. Around 12% of the population belong to an ethnic group other than White British or White Irish.[46]

APPENDIX B
National project overview

Background
The concept of a local food web stems from the work of Caroline Cranbrook. In 1998 Caroline grew concerned about the impact of a proposed superstore on her local market town of Saxmundham in east Suffolk. She researched the local food network and showed its importance to Saxmundham, and the surrounding towns and villages.

Caroline found that local food producers, wholesalers and outlets depended upon each other and also supported local businesses such as builders and electricians. Local outlets provided an accessible market for new food business start-ups. Keeping local shops open gave people access to good affordable food and places to meet. By providing a market for their produce local outlets enabled farmers to raise livestock which, through grazing, maintains important nature reserves and beautiful Suffolk river valleys such as the Alde.

CPRE published Caroline's findings in *Food Webs* (1998) and in *The Real Choice: how local foods can survive the supermarket onslaught* (2006), which shows how the local food web has prospered since the superstore development was turned down.

This research suggested local food networks with similar benefits exist elsewhere, but further evidence was needed.

Aims of the national project
Mapping Local Food Webs is a national project led by CPRE, supported by Sustain, and funded from 2007 to 2012 by the Big Lottery Fund through the Making Local Food Work programme. The project engages people in researching their own local food web in up to three towns and cities in each of the eight English regions.

The project aims to increase the local community's understanding of the size and importance of the local food web and its impact on local people's lives, livelihoods, places and the countryside. It explores the relationships between what people buy and eat and the character of their town and the surrounding countryside. Finally, it aims to increase support for greater local food production and better supply in local outlets, and to strengthen and secure local food webs across the country.

Individual mapping projects have been running since early 2009 in 19 towns and cities across the country. We selected each on population size (below 10,000, 10,000-30,000, over 30,000) and to achieve broad coverage of the relevant region. In each location we established a core study area defined by a 2.5-mile radius circle usually centred on the town or urban area. Beyond that, we defined a 30-mile radius circle as the local supply area.

The project employed regional co-ordinators to recruit and support local volunteers to research shoppers' attitudes to local food, identify and interview outlets selling locally sourced food in the core study area, and interview a sample of their suppliers. We held open public meetings and workshops to involve local residents and businesses in the project, to raise awareness of the issues and to gather information on barriers and opportunities to local food.

Definition of a local food web and local food
A *local food web* is the network of links between people who buy, sell, produce and supply food in an area. The people, businesses, towns, villages and countryside in the web depend on each other, and this interdependence benefits livelihoods, quality of life and the quality of places.

This project defines *local food* as raw food, or lightly processed food (such as cheese, sausages, pies and baked goods) and its main ingredients, grown or produced within 30 miles of where it was bought.[47]

APPENDIX C

Overview of the Norwich project

Norwich was one of two cities mapped in the East of England, alongside Ely in Cambridgeshire. It is one of the largest towns/cities above 30,000 people covered by the research. Regional co-ordinator Rachel Sutton recruited and supported a team of local volunteers. The main project ran from June to November 2009.

Area covered

The core study area (a 2.5-mile radius circle from the town centre) covers the city of Norwich. The 30-mile supply chain area covers much of Norfolk and the northern part of Suffolk. The area includes the Norfolk Broads National Park, the Norfolk Coast AONB and the Suffolk Coast and Heaths AONB.

Main project activities

These were:

- holding a public meeting on 10 June 2009 to introduce the project and recruit volunteers
- holding a public workshop on 23 September 2009 to gather information and views on local food, attended by 31 people
- screening 58 food outlets within the core study area and identifying 48 selling locally sourced food (42 independent stores and full-time market stalls, five box schemes and one farmers' market stall)
- interviewing 20 outlets selling local food (14 independent stores, two full-time market stalls and four box schemes) on aspects of their business, including its economic, social and environmental impact, and to identify their main local suppliers
- interviewing a sample of seven supply chain businesses (5%) of a minimum of 150 identified
- interviewing 160 food shoppers on attitudes to local food and purchasing habits
- researching case studies
- holding a conference at Dragon Hall, Norwich on 9 May 2012 to present the research and discuss the city's food future, attended by 60 people.

Scope and limitations of the research

Data collection

Local volunteers carried out field research using questionnaires developed by a university research team and pilot tested in six locations.

The approach taken was:

- for food outlets – to identify and screen for local food sales; to interview as many local food outlets as possible, with retail as the priority
- for suppliers/producers – to interview all businesses in the supply chain of two products in each of seven main product types (meat, processed meat, dairy, eggs, fruit, vegetables, preserves) with a target of seven simple (single-stage or direct) and seven complex (multiple-stage) supply chains
- for food shoppers – to sample shoppers in a range of locations including streets, markets and community venues in different areas. To achieve a broad sample of ages and income levels, we set a minimum of 20 respondents in each age and income band with an overall minimum of 120 surveys. Guidance was given on achieving gender diversity and good representation of ethnic minorities, although targets were not set.[48]

In general, the success rate for these targets was good for outlets, suppliers and shoppers. In total, we surveyed 160 shoppers in Norwich, interviewing 20-35 shoppers in each age band. For income, coverage was good for lower and middle income bands up to £40K, though somewhat poorer for higher earners: £10K or less (32), £10-20K (41), £20-30K (26), £30-40K (14), £40K-50K (7), £50K-60K (5), £60K-70K (5), over £70K (2); 18% gave no answer. This may reflect lower income levels in Norwich relative to other parts of the UK.

Data analysis

CPRE staff and volunteers collated and analysed statistical and qualitative data (mainly answers to open questions or workshop comments) which underpin the findings in this report.

We interviewed a high percentage of retail outlets so, though samples were not randomised or stratified and are not strictly representative, we believe they strongly illustrate trends and issues. Unless a different source is given statistical evidence derives from direct answers from businesses interviewed, with mid-point figures used where answers are given as range data. We note where statistics are produced by extrapolation to a larger population. Supply chain businesses were selected on the basis of product type and to this extent selection was randomised.

Qualitative findings are drawn from comments organised and coded by theme then corroborated by several interviewees (usually five or more) and where possible cross-referenced to comments from other surveys. In general, we give greater weight to businesses than shoppers, as we interviewed a much higher percentage of the total business population. Shopper surveys were analysed both thematically and statistically.

Where we refer to 'local' or 'locally sourced' food or produce we have relied upon information supplied by outlets, but we have independently confirmed the location of supply chain businesses. It was beyond the scope of this research to verify whether produce is entirely or partially locally grown or raised, although many suppliers are identifiable as primary producers (mainly farmers or growers).

APPENDIX D

Endnotes

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2 Norwich City Council Corporate Plan 2012-15, www.norwich.gov.uk/YourCouncil/KeyDocuments/CouncilPerformance/Documents/Corporateplan.pdf
3 Norwich City Tourism Strategy, 2004, www.norwich.gov.uk/YourCouncil/Documents/TourismStrategy.pdf
4 www.legislation.gov.uk/ukpga/2012/3/introduction/enacted
5 These included 42 'fixed' outlets, five box schemes/CSAs and one farmers' market stall
6 12 outlets and four suppliers
7 10 outlets and six suppliers
8 www.fairtrade.org.uk
9 Norwich Sub Region: Retail and Town Centres Study, October 2007, www.gndp.org.uk/content/wp-content/uploads/downloads/2010/08/EC-4-Final-Report-Chap-1-12.pdf
10 Ibid.
11 Source: East of England Co-operative Society, Annual Report and *Financial Statements of the East of England Co-operative Society for the year ended 26 January 2013* at http://www.eastofengland.coop/assets/a/n/annual-report-2013.pdf
12 Mentioned by 10 outlets and four suppliers
13 Eight outlets and three suppliers made this point
14 All percentages given are based on the number of shoppers answering the specific questions except for the main and extra shopping destinations where the percentages given are based on the total number of responses where interviewees gave one or more answers.
15 We carried out a regression analysis of the data which showed no significant relationship between the percentage of weekly shop allocated to local food and household income.
16 Any of a number of small sharks of the family Triakidae, among them the well-known smooth dogfish (www.britannica.com/EBchecked/topic/550123/smooth-hound)
17 Paxton, A, "The Food Miles Report: The Dangers of Long Distance Transport". In: Chambers, N, Simmons, C and Wackernagel, M, *Sharing Nature's Interest*, Earthscan, 2000
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26 Norwich City Council, *Norwich Local Plan: Development management policies development plan document: Regulation 19 pre-submission draft plan for consultation*, August 2012, www.norwich.gov.uk/YourCouncil/Consultations/CurrentConsultations/Documents/DMPlanConsultationDocumentAug2012.pdf, p247
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29 Norwich City Council, 2012
30 Department for Communities and Local Government, National Planning Policy Framework, March 2012, para. 23, p7 www.communities.gov.uk/documents/planningandbuilding/pdf/2116950.pdf
31 See www.norwich.gov.uk/apps/local_plan/written/cpt7.htm#sho20
32 Sustain Food Co-ops Toolkit – a simple guide to setting up your own food co-op: www.sustainweb.org/foodcoopstoolkit
33 These measures are permitted by European Union Directives, though specifying local produce is not. These recommendations are drawn from Food Links UK, *Best Practice in Sustainable Public Food Procurement*, June 2006 www.localfood.org.uk/library/Defra-FLUK%20best%20practice%20final%20June%2006.pdf
34 For example, Haslemere has an award-winning Reward Card scheme: www.haslemere.com/rewards
35 Broadland Food Directory 2010, www.broadland.gov.uk/PDF/Food_directory_2010_resized.pdf
36 Broadland, Norwich and South Norfolk councils have now prepared extra planning guidance on the proposed hub; www.south-norfolk.gov.uk/CARMS/meetings/cab2013-05-07ag07.pdf
37 www.fifediet.co.uk
38 Please note that the data on the number of suppliers and producers given in this report is likely to be an underestimate of the real total as it is based on actual figures reported from outlets interviewed. That is, it is not extrapolated to estimate the number of suppliers who deliver to outlets not interviewed, nor did the research investigate widely the businesses in more complex supply chains – at more than one degree of separation from outlets.
39 Norwich Sub Region Retail and Town Centres Study
40 www.environment-agency.gov.uk/aboutus/organisation/77998.aspx
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46 www.norfolkinsight.org.uk/Custom/Resources/Norwich_DHP.pdf
47 Please also refer to the data analysis section under 'Limitations of the research'
48 Some gender bias was expected as more women than men do food shopping. In Defra's *2007 Survey of Attitudes and Behaviours in relation to the Environment*, 70% of the main food decision-makers were women. Therefore it was deemed not unreasonable for the sample to contain more women than men with a split of roughly 70% women, 30% men.
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Spotlight on local – Cromer Crab

Once a seasonal addition to fishermen's hauls along the Norfolk coast, with the decline of herring and cod stocks, Cromer crab and lobster became the mainstay of the local catch. The crabs found along this stretch of the north Norfolk coast are known especially for their sweet and tender flesh and have spawned many distinctive local recipes. They are sold to markets around the country and abroad but fresh crab can still be found at local fishmongers in the area. However, in Cromer, like other fishing towns around the country, traditional fishing fleets have shrunk, with around a dozen boats now left in the town. The Cromer Crab Company, formerly one of the town's largest employers, closed its doors in August 2012 with the loss of 230 jobs and the owners moved shellfish production to Grimsby. The closure spurred a wave of protest and renewed campaigns to secure EU protected food status which would ensure Cromer crabs called by that name is caught and processed locally. Happily, in August 2013 local business Jonas Seafoods opened a new factory to bring the processing of live crab back to the town. It will employ over 30 people to process hundreds of crab each year.[49]

Spotlight on local – Beeston Farm Shop

Beeston Farm Shop, a mile or two north of Norwich centre at Beeston St Andrew, sells its own fruit and vegetables harvested daily as well as supporting many, often small local suppliers and producers. It strongly promotes local food and stocks a wide range of goods from the area including a Norfolk Hamper. The shop also supports the community by donating hampers and vouchers to local good causes, providing education through school talks and farm visits and holding tasting events. Beeston Farm Shop helps to maintain the countryside on its own land through a range of green farming schemes and measures including managing hedgerows, maintaining wide buffer strips on arable land and permanent grassland. It also supports other farmers in planting and maintaining a varied flora and fauna. The business won the EDP Norfolk Food Awards farm shop of the year in 2006 and the Countryside Alliance national best rural retailer and best local retailer awards in 2008.

Making Local Food Work is a five-year £10 million programme funded by the National Lottery through the Big Lottery Fund. It helps people to take ownership of their food and where it comes from by supporting a range of community food enterprises across England. Community food enterprises are businesses run by communities for their benefit, which are involved in at least one part of growing, harvesting, processing, distributing, selling or serving local food. Examples include farmers' markets, community-owned shops, community-supported agriculture, country markets, food co-operatives and many others. **www.makinglocalfoodwork.co.uk**

The Big Lottery Fund's Changing Spaces programme was launched in November 2005 to help communities enjoy and improve their local environments. The programme is funding a range of activities from local food schemes and farmers' markets, to education projects teaching people about the environment. Full details of the work of the Big Lottery Fund, its programmes and awards are available on its website: **www.biglotteryfund.org.uk**

CPRE fights for a better future for England's unique, essential and precious countryside. From giving parish councils expert advice on planning issues to influencing national and European policies, we work to protect and enhance the countryside. We believe a beautiful, thriving countryside is important for everyone, no matter where they live. Nationally, we don't own land or represent any special interests. Our members are united in their love for England's landscapes and rural communities, and stand up for the countryside, so it can continue to sustain, enchant and inspire future generations.

We aim to:

• Influence land use in town and country for people and nature

• Protect and enhance beauty, tranquillity and local distinctiveness

• Increase and harness public and political support for the countryside.

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