Rathbone Greenbank Review

Summer 2004

Good Food for All?

– the challenge of food retailing

In this newsletter we investigate the food retailing industry, and particularly the role of the supermarkets in achieving a more sustainable and organic food industry. We find that the supermarkets are most influential participants in the industry. However, while there are some actions that individual supermarkets can take, more substantial change will require government action and consumer education. We also find that alternative mechanisms for retail distribution are growing rapidly from a small base, and will help food producers and also challenge the practices of supermarkets. Finally, we find there does appear to be significant potential for encouraging the use of organic and locally produced food in the catering industry, and some companies are beginning to recognise both their responsibilities, and their opportunities, in this area.

Greenbank update

We are continuing to make progress in 'greening' our operations. Our new brochure was produced using recycled paper, and our stationery, valuations and tax packs are also now on recycled stock. We are still trying to procure our complete range of envelopes from recycled sources, but this is proving problematic given the number of different configurations that we use. We have just taken delivery of a new duplex printer which will help to reduce our paper consumption.

Through our participation in Rathbones' Social & Environmental Committee (SEC) we are continuing to seek ways the Group as a whole can improve its environmental and social performance.

Investor Day 2004

This year's event will be held on Thursday, 23rd September at the Henry Doubleday Research Association (HDRA) organic gardens at Ryton, near Coventry. We will be following up on last year's successful day in Bristol by inviting speakers from organisations involved in public sector catering and campaigning for better food and farming.

For further information, please contact Isabel Partridge or Carol Helps on (0117) 930 3000. Alternatively, you can e-mail greenbank@rathbones.com.

Supporting The Funding Network

The Funding Network organises meetings where charities can present social change projects to individuals interested in giving to such causes. The events are inspiring and enjoyable. Rathbone Greenbank Investments was very pleased to sponsor the evening meeting in London on 27th May. The event was a great success and managed to raise over £24,357 for activities ranging from support for stroke sufferers to helping women's learning in Sierra Leone.

We are also helping with two forth-coming meetings for Funding Network South West (in Bristol on Saturday 6th November) and the Funding Network Scotland (in Edinburgh on the 6th October). We do hope that a number of you will be interested in coming along to these events.

For more information, please email mark.mansley@rathbones.com or visit www.thefundingnetwork.org.uk.

Bristol Schumacher Lectures

This year's lectures, under the title of "Spirit, Nature, Matter", will take place at the British Empire & Commonwealth Museum, adjacent to Temple Meads Station, Bristol. Commencing at 10 a.m. on Saturday 30th October 2004, the speakers will include Christopher Alexander, Miriam McGillis and Satish Kumar.

For more information visit www.schumacher.org.uk

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Retailers – Can they be gatekeepers to sustainable food?

In our last newsletter we put forward the case for supporting local and organic food, focusing on producers and processors. In this follow up article, we investigate further up the food chain, looking at organic food retailing in the UK.

We consider critically the role of the companies that dominate the sector, as well as the alternative distributors and the catering industry, in supporting or hindering organic and local food production.

Organic food sales in this country have now topped £1 billion[1], with an annual growth rate of some 10 per cent, indicating that an increasing number of consumers are being attracted to the benefits of organic over conventionally produced foods.

In real terms though, the organic food market is still in the embryonic stage, as £1 billion represents only 2 per cent of the total UK food and drink market, or just 5 per cent of Tesco's annual turnover. In fact, the annual market for organic food is less than the amount spent annually by the British on burgers or fish and chips[2].

Nevertheless, there is a rising tide of public awareness regarding food, albeit driven more by rising health concerns and recurring food safety crises, than by anxiety over the environmental impacts of conventional intensive farming methods. Encouraging the development of organic and local food economies has also now moved onto the UK Government's agenda.

But the key to any real growth is bringing together all the players in the food production chain – and herein lies the problem. Our food chain is highly fragmented at one end (production) and highly concentrated at the other (retail). Just four companies dominate food retail in the UK: Asda (owned by US giant, Wal-Mart), Tesco, J Sainsbury and William Morrison (which now incorporates Safeway). They account for 80 per cent of the food we buy from retailers[3]. Globally, food retail is dominated by a mere 30 companies.

To achieve the changes to transform the current model of food production and supply from so-called "food-Fordism" with its emphasis on low cost production and price competition, to organic (or sustainable) local food economies, all parts of the food chain must act together. But such is the power of the large multiple retailers that, even given the best will of producers and consumers, the pace of change is controlled by them.

Publicly, supermarkets seek to project a trustworthy image and have developed extensive corporate responsibility programmes. However, these only go so far, and beyond this the majors do not appear to accept broader responsibility for the whole food chain, incumbent upon them by the very fact that they wield the most power.

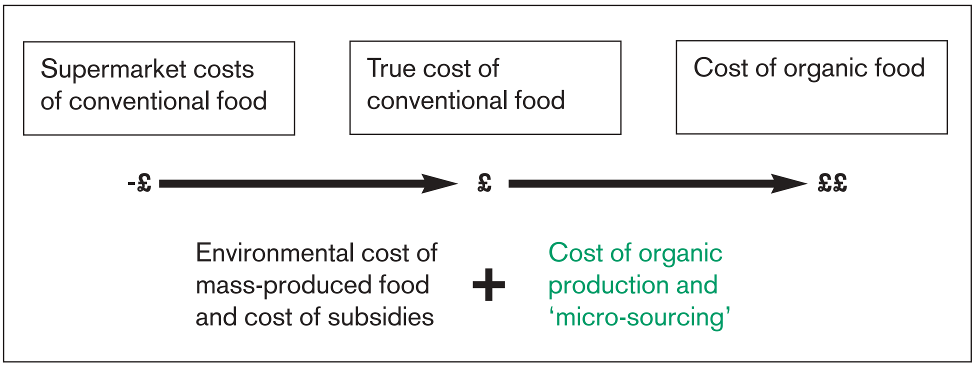
Supermarkets – branding 'organic'

Supermarkets can justifiably claim some credit for propelling organic food to the edge of the mainstream, as they sell over 80 per cent of the organic food sold in the UK; their rush to embrace organics has also encouraged many farmers to convert to organic methods. This in turn has brought a much-needed influx of new people and fresh thinking into agriculture. From 900 organic farmers and growers just a few years ago, there are now more than 4,000[3].

But any realistic analysis of the majors' policies towards organic and locally sourced produce reveals organics largely being treated as another 'select' line, or expensive brand. Products labelled 'organic' or 'locally produced' attract a premium in contrast to conventional produce. On the one hand this premium reflects the increased cost of production associated with organic production methods and low-bulk sourcing. On the other it is indicative of the artificially low prices at which many conventional foods are sold as their prices do not internalise the cost to the environment and society of producing food intensively. The diagram opposite illustrates this point.

"…there is a rising tide of public awareness regarding food…"

“Most importantly, knowledge and information are not freely available”



Importantly, when price comparisons between organic and conventional food are carried out, the real reasons for this premium are not visible, so the result is that organic or local food is perceived as a luxury ‘brand’.

Action to reduce this premium is essential if organic food is to reach the mainstream. On the one side, government action is required to remove subsidies and to ensure that the price of conventional food reflects its true costs. On the other, action to reduce costs among organic food producers is important. There is scope for greater co-operation amongst organic producers to improve production efficiency through economies of scale. Greater specialisation and continuing research should also help improve yields.

A food democracy?

An article by Safeway’s communications director published on the British Retail Consortium’s website insists that the role of supermarkets in a “food democracy” must not be a dictatorial one; rather, their duty to consumers is to provide choice, and it is consumers who will then decide[4].

The concept of a food democracy is a powerful and attractive one. Yet it is one that requires real choice: the ability to afford the various options available; a suitable range of options from which to choose; and sufficient knowledge and information to choose appropriately. In reality, we are a long way from a true food democracy. Excessive price premiums restrict better food choices to those with higher disposable incomes. The real extent of choice is often less than it appears - for example, the decline of local food retailers means many have little choice but to use supermarkets; similarly within supermarkets choice may be selective: umpteen varieties of pizza but no locally sourced food.

Most importantly, knowledge and information are not freely available for two reasons. First, prominent labelling only accentuates the positive – “organic”, “fair trade”, “low fat” etc. – whereas, in a true food democracy, equal weight would be given to the negative aspects of food production or processing. Thus, labels might state “battery-reared”, “contains pesticide residue” or “chicken may contain manipulated pork and bovine DNA”. Secondly, when ingredient listings and nutritional information is available, it is often inaccessible and difficult to understand. For example information on additives comes ‘coded’ as E numbers or chemical names. Information on aspects such as fat and salt content is difficult to interpret (e.g. what percentage of the recommended daily intake it comprises), not always available and inconsistently described. Perhaps even more serious is the almost total lack of nutritional information provided on menus in fast-food outlets, pubs, restaurants or hotels.

If supermarkets really wish to see a “food democracy” then they should be keen to see food clearly and useably labelled, They should endeavour to make labelling work rather than hiding behind arguments such as “consumers simply don’t read labels”. The Department of Health’s “5 A DAY” campaign (aimed at promoting consumption of fresh fruit and vegetables) worked well because it represented an opportunity to increase sales; labels were therefore well designed and thought out. Labelling food with its fat, salt and sugar content is not such an attractive marketing proposition, but reluctance to consider such action indicates, at best, selective support for a real food democracy.

Supermarkets – new ways of doing business?

Apart from labelling foods accurately to educate consumers about the true origins and content of food, supermarkets could in the future become true providers of choice by becoming food service, or facilitator, companies on behalf of organic and local food producers:

- Supermarkets could franchise fresh produce counters to local suppliers, becoming the means by which suppliers and producers are brought together.
- Food access could be addressed by using the existing online shopping delivery infrastructure as mobile fresh produce shops.
- Rather than selling “ready meals”, supermarkets could prepare meal packages with raw ingredients and instructions for preparation.
- Supermarket buyers could work more closely with regional co-operatives of local producers to ensure crops are planned according to demand.
- Customers’ loyalty cards could be updated to show the food miles or carbon footprint of their purchasing decisions.

"This consolidation of the retailers spells further bad news for producers and smaller retailers"

If supermarkets were to take collaborative action to formulate local and organic food sourcing targets and to develop regional and local distribution networks, massive environmental and social gains could be made without damaging the dominant position of the major players.

Voluntary change – a realistic proposition?

However, the prospect of voluntary collaborative action is a distant one; the most recent attempt to bring the major retailers together under the *Race to the Top* programme resulted in failure. The termination of Race to the Top in January 2004 lays bare the fact that the majors are resisting any wide-ranging and meaningful voluntary action. *Race to the Top* was set up in 2000 with the idea of expanding competition amongst major retailers to other issues influenced by supermarkets' "gatekeeper" role in the food system. These included improvement in production practices and animal welfare, the promotion of public health and the fairness of trade between consumers and workers along the food chain. Organic and local food issues were a fundamental part of this programme[5].

The failure of this voluntary programme to increase transparency and disclosure was rooted in several causes, including the absence of the major players, Tesco and Asda, and a belief that a successful voluntary scheme might be translated into government regulation.

Further industry consolidation in the form of the takeover of Safeway by William Morrison has caused commentators to predict that supermarkets will shave 1 per cent (equivalent to £1 billion) off prices over the coming year, as Asda, Sainsbury's and Morrisons fight for market position behind Tesco[6].

This consolidation of the retailers spells further bad news for producers and smaller retailers. In this climate of competition, it is very unlikely any one of the majors will go out on a limb with new initiatives to increase organic and local food.

Thus impetus for change must come from other directions – primarily through government policy and leadership, and through consumers.

Government action

In December 2002 the government's Policy Commission for Food and Farming published "Facing the Future" outlining its strategy for improving the competitiveness and environmental sustainability of UK food and farming[7].

A number of policy initiatives came out of this, including the Organic Action Plan[8]. This proposed that UK farmers should supply at least 70 per cent of the UK organic market, as opposed to the then 30 per cent, by 2010[9]. However, even optimistic assessments of growth in the organic sector mean that 70 per cent of the UK organic market still represents a minute fraction of the *total* UK food market.

The Policy Commission also recommended that the Office of Fair Trading publish a review of the Code of Practice between supermarkets and suppliers as the existing voluntary Code, drawn up to curb what the Competition Commission called "abusive and coercive practices" in supermarkets' relations with suppliers, is widely seen as having failed. The review, finally published in February this year, did indeed find a widespread belief among suppliers that the Code is not working effectively. However, it also concluded there was no hard evidence to support this. The OFT is therefore commissioning further work to establish how supermarkets deal with suppliers under the Code. Fear of complaining was the main reason identified for the Code's perceived lack of effectiveness.

Although moving in the right direction, more specific legislation is required to ensure that supermarkets do not engage in predatory pricing on staple products to entice customers at the expense of local traders. Frequently producers find that they are required to cover the costs of special promotions and offers. A requirement that supermarkets buy local produce, where possible, including organic fruit and vegetables that do not necessarily conform to their exacting cosmetic requirements, would help to ensure a sustainable UK agricultural sector.

National food policy, though, is constrained by EU and international legislation, and must not favour or protect domestic over foreign produce. However, as in France, these rules can be overridden by careful attention to contractual detail; for example, by stipulating that environmental or social obligations be fulfilled as well as standard pricing and quality issues.

Consumers

Consumers are obviously the key factor in increasing organics' share of the UK food market. It has been calculated that we spend £53 a year per household on organic food, out of a British family's total annual budget for food and non-alcoholic drinks of £2,200[10]. Although consumers are demanding more organic and locally sourced produce, price remains the determining factor in whether people choose to buy organic. According to The Independent newspaper, buying organic can add 50 per cent or more to the weekly grocery bill[11].

Clearly, action to reduce this premium must be a priority. However, the challenge is greater because the majority of consumers still regard value as a function of quantity rather than quality – something the supermarkets have encouraged with their special offers and price based marketing. The future growth of the organic and sustainable food sectors will also depend partly on whether public awareness about farming, nutrition and environmental issues continues to grow – an awareness that associates value to attributes other than quantity. At least in one niche market there is a clear indication that such awareness is developing – 75 per cent of British babies are now fed on organic baby food[12].

Education about food is of vital importance. Without knowledge, consumers come to place their trust in brands – either those of the producer or the retailer – where they may find themselves consuming, unwittingly, food which may be of dubious nutritional value and unsustainably produced. Education on food will have to come from many sources: government, the media, and the health service. However, supermarkets are particularly well placed to raise awareness and educate consumers.

To date, though, supermarkets have played only a limited role in educating people about food, and in certain areas they have probably contributed to a loss of knowledge. For example they have successfully removed the concept of seasonality, with air freighted foods. Their support for pre-prepared foods (which are of course "value-added" - i.e. added profit) has helped contribute to the decline of culinary knowledge.

Yet with their marketing resources and expertise, they could really help change consumer attitudes to food. For example, advertising deals with celebrity chefs have helped to create culinary icons whose recipes can inspire the nation to empty supermarket shelves of the required ingredients the next day – so why not focus occasionally on recipes requiring seasonal organic produce?

Comparing supermarkets commitment to organics

One useful way of distinguishing between supermarkets' attitude to organic food is the attitude to domestic sourcing. Companies with a real commitment to organic and sustainable food are likely to understand the desirability of sourcing food in the UK, whereas those that regard organic food as a marketing opportunity are likely to be happy to import food from overseas.

The Organic Targets Campaign is calling on supermarkets to set targets to increase the amount of UK-sourced organic food in order to reduce organic imports to 30 per cent by 2010. So far only Sainsbury's and Waitrose have committed to targets. Sainsbury's, which has been the leader in organic sales, has more than 1,000 lines, including fresh milk, butter, eggs, pork, beef and chicken. In an attempt to catch up, Tesco has introduced 80 new lines and its overall dominance of the UK food retail sector is reflected in the fact that it now has 27.5 per cent of the UK organic market[13]. There has been welcome progress in the extent to which organic food is sourced in the UK, with imports falling from 70% to 56% in 2003, but there is still some way to go.

Not surprisingly, Sainsbury's and Waitrose have dominated the Soil Association's Organic Supermarket of the Year award for the last five years, with Sainsbury's winning the award for the third time in 2004.

UK sourcing of organic produce by supermarkets 2002.

Position	Supermarket	% organic from UK sources	Notes
1	Waitrose	85%	Primary agriculture organic target is to source 100% from UK when in season
	Organic Action Plan target (Defra)	70%	
2	Marks & Spencer	60%	Imports in some areas (e.g. dairy) as low as 3%
3	Sainsbury's	40%	Target to reduce imports to 45% by 2004
4	Co-op	34%	
	Average % organic sourced from UK	30%	
5	Safeway	25%	No figures available for Morrisons & Safeway combined
6	Tesco	20%	

Source: Organic targets campaign, c/o Sustain: the alliance for better food and farming. 26th July 2002: "Supermarkets failing to buy British Organic Food".

What are the alternatives to supermarkets?

The amount of organic food sold at farmers' markets, farm shops and through direct delivery (box schemes) has increased by a third in the last year to account for a tenth of all organic food sold[14]. It also appears that some organic shoppers are reducing their support for supermarkets and turning to local businesses. For the first time in five years, the share of the organic market made up by supermarket sales fell, albeit marginally, from 82 per cent to 81 per cent, although the overall value of organic sales through supermarkets continued to rise significantly[15].

1. Independent and specialist chains

The growth of natural food shops throughout the UK has to a degree mirrored the growth in organic food sales, despite the concentration of these sales in supermarkets. Independent stores have provided high street access to organic and local produce, with some such as Bristol-based Better Food Company deliberately locating in areas to provide access to less affluent communities.

However, some organic businesses have been so successful that they are being snapped up by large multi-nationals keen to secure their share of this lucrative market. Examples include the purchase of Go Organic by Unilever in 2001; US organic dairy and juice producer, Horizon Organic Holdings, acquired by Dean Foods in January 2004; and Fresh & Wild Holdings' sale to the leading American natural foods grocer, Whole Foods Market, for £21 million, also in January 2004. Some would argue that these small companies are selling their souls to the very antithesis of their founding principles. Others see it as the inevitable progress of globalisation. Combined with a growth in the number of inner city convenience stores established by the major retailers, high streets may become repopulated by 'small' stores, but this does not necessarily convey benefits to local or small-scale organic producers.

2. Farmers' markets, box schemes and co-operatives.

Alternative retail channels have experienced rapid growth in recent years - sales of organic food through farmers' markets, box schemes and farm shops reached over £90 million in the last financial year – a growth of 30 per cent[16], and achieved levels significant enough to warrant coverage in the Financial Times[17].

From a single farmers' market in Bath in 1997, there are now more than 450 weekly and monthly events, generating £166 million a year for farmers and growers. More than 15 million people visit a farmers' market each year and two thirds of organisers questioned by the National Farmers' Union this year said they had plans to expand[18].

Farmers' markets have helped to save many farmers from going bankrupt and are credited with rejuvenating town centres. Furthermore these markets are instrumental in re-establishing the link between the urban and the rural, the consumer and the producer.

However, supermarkets are countering this with advertising campaigns featuring photographs of suppliers in an attempt to convince customers that their products are also grown locally on a small scale. Sainsbury's has even emulated the farmers' market format with The Market at Bluebird, a joint venture between the company and Sir Terence Conran in Chelsea. With artisan bread-makers, olive oil stalls and pyramids of fresh fruit, it offers a personalised experience that is more akin to shopping at a food market in France or Italy[19].

Corporate emulation aside, farmers' markets are taking action with a series of measures aimed at protecting the original ethos of local growers selling their produce direct to the customer. The National Association of Farmers' Markets has launched the world's first accreditation system for the events. To be certified, markets will have to meet strict criteria such as ensuring that all producers are from within 30 miles of the event (100 miles for London) and that the farmers must be selling the goods.

Box schemes too have developed rapidly throughout the UK. Riverford Organic Vegetables, with a turnover of £4.6 million, is a shining example of this form of retail. The company delivers produce to 2,500 homes all over Devon and 35 local retail outlets per week, including Ginsters of Cornwall and Tartiford Foods of Devon. In addition there is a strong wholesale element, supplying to New Covent Garden five days a week[20]. By having such a diversity of markets there is always a market for the grower and this provides a degree of security.

The South Devon Organic Producers co-operative group was set up to supply the business, with typically 45-50 per cent of the retail value going back to the growers, as opposed to selling through supermarkets, when

> "Farmers' markets have helped to save many farmers from going bankrupt and are credited with rejuvenating town centres"

producers are lucky to see only a third, and more often, only one quarter of the retail value[20].

The Organic Directory (www.soilassociation.org) lists a staggering number of box delivery schemes that distribute seasonal produce from locations all over the country. Some consumer education, however, is required as seasonal food, whilst fresher, tastier and of less impact on the environment, often presents a greater culinary challenge!

3. Restaurants & pubs

Only 1 per cent of organic food companies bearing the Soil Association's logo are caterers[21]. A number of factors specific to this sector have hampered the growth of organic offerings. First, regulations designed to stop consumers being misled are holding back growth in the catering sector. Since 1991, European law has required anyone selling organic food to register and undergo regular inspections. In the UK, growers, processors and importers must be approved by a recognised certification body such as the Soil Association. The rules apply to any foods prepared out of the sight of the customer and sold to the general public. This includes restaurant meals. But the rules largely designed for farmers and food processors are not so easily applied to caterers, pubs or delicatessen counters[21].

The difficulty of providing a strict paper trail for constantly changing ingredients and menus means some restaurateurs have simply pulled organic items from their menus. Others, who list only a handful of organic items such as "organic local lamb", simply ignore the rules. The difficulty is achieving a balance between regulation that gives customers reassurance while at the same time not stifling growth.

In June 2003, the Soil Association launched a new set of organic standards for caterers, which had been in development since 2001. The Ritz, Pizza Piazza and organic pub operator Singhboulton were among the first to be approved. The Soil Association claims accreditation offers legal peace of mind and a means of winning the trust of sceptical consumers. But some high profile restaurateurs – notably Antonio Carluccio and Antony Worrall-Thompson – have criticised this all-or-nothing approach, saying it is too restrictive[21].

A further problem arises from the fact that the Soil Association's catering standards committee tends to be dominated by 100 per cent organic operators. It therefore misses the gap for caterers seeking to offer a proportion of genuinely organic foods alongside their conventional offer, especially since some organic ingredients offer superior taste and quality as well as less easily-proved health benefits.

4. Public sector food procurement & contract catering

The potential for what is loosely called "the catering sector" to be a major source of demand for organic/local/fair trade producers and suppliers is gradually being recognised. As we highlighted in the previous newsletter, catering accounts for about 30 per cent of total expenditure on food in the UK, with the public sector (i.e. schools, hospitals, care homes, prisons, government departments etc.) representing around 7 per cent of this[22].

The most significant part of the catering sector is represented by foodservice groups providing contract catering facilities to employees of larger companies and organisations. By building on our familiarity with well-know brands, they have sought to change the concept of the "works canteen" to one which is more recognisable from our everyday lives.

In order to understand more about the current situation regarding the use of organic/local/fair trade food by private contract companies, we contacted the three main major players in this sector – Compass, Sodexho and Initial – to see to what extent (if any) they were addressing this issue. We also sought to understand whether growth in this area was being driven by the companies themselves, or by the demands of their clients.

We were disappointed to receive a detailed response to our questionnaire from only one of the companies – Compass – so our findings are drawn from a fairly narrow source. However, Compass is the world's largest foodservice company, so the information it has supplied represents the views of a market leader with the ability to drive change in its sector.

In addition to the company's response – the key points from which are summarised in the table overleaf – we have been encouraged by public statements made by the group's chairman, Sir Francis Mackay, about his perceptions of the way forward for foodservice companies. With a focus on providing healthier eating options and fostering changes in eating habits "through evolution, rather than revolution", he believes that Compass holds a competitive edge in this increasingly important area of food provision.

Conclusions

Because fundamental changes are needed in the food retailing industry, requiring action from the government, investor engagement with the major food retailers can at best encourage relatively minor improvements in practice. We remain cautious about the suitability of most major supermarkets for investors with concerns in this area.

In contrast, the catering industry appears to be more open to considering changes and exploring opportunities for improving the quality of food they provide. Engagement by investors, along with other stakeholders, is likely to be very useful to help encourage companies to pursue these opportunities and play a constructive role in bringing better food to many people – particularly key groups such as school children.

Sara Dresner, Perry Rudd,
Mark Mansley

Compass Group plc – comments on the food chain

Traceability of ingredients through the supply chain…

…larger suppliers & distributors use a product tracking system which can identify where specific batches have been delivered to. Most smaller suppliers are encouraged to operate manageable paper-based systems, for which Compass has helped to develop guidelines in conjunction with the Food Standards Agency.

Food preparation and supply…

…whilst no cook/chill foods are supplied to schools, some 30% of hospital clients use food prepared in this way, or frozen.

Provision of nutritional information to customers…

…dietary requirements for NHS menus are based on DoH guidance and are analysed to ensure that they meet recommended nutritional standards. Staff are trained in the basics of nutrition and the requirements of patients on therapeutic diets. Primary school meals provided by Compass's education division, Scolarest, exceed the minimum nutritional standards set by government - menus are developed in accordance with nutritional guidelines proposed by the Caroline Walker Trust.
In the secondary sector, Wellgood is a healthy-eating strategy based on a sensitive approach to changing children's food culture – healthier foods are introduced gradually alongside existing familiar offers so children can make choices.

Use of organic/local/fair trade ingredients & targets…

…Compass supports government programmes (such as Defra's Sustainable Food Procurement Initiative) and is actively pursuing local sourcing, the provision of organic products and the use of fair trade suppliers – it has already listed Cafédirect products[23]. Consumer demand has led to new routes to market for organic and fair trade products, but the current level of demand for such products is minimal as a percentage of the total UK supply chain.

Customer attitudes to organic products & barriers to expansion…

…factors preventing expending greater purchasing power in this area: availability of product in bulk to satisfy menu plans; logistics of sourcing; price. Where organic products are offered, only a small percentage of customers are prepared to pay extra.

Possible litigation due to health problems caused by dietary imbalance…

…Compass has not made any provision for possible legal action from consumers of its products as it believes such a claim would be very difficult to substantiate given that its menus in the public sector meet nutritional guidelines and the company offers a full and varied choice of dishes within its contracts, including healthier option meals.

Published information on company policy regarding food issues…

…a full range of policy documents on GM ingredients, fair trade sourcing, provision of organic products and food safety is publicly available.

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