



# **An inconvenient sandwich:** the throwaway economics of takeaway food

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# Preface

It's lunchtime or early evening. The local eateries are filling up with customers in search of rolls, chips, pies, burgers, kebabs, curries, tacos, noodles. Mass refuelling from small, high-street outlets. It's an everyday habit, as typically British as it is ethnically diverse. It powerfully defines the way we live and what we expect as consumers: a tasty, affordable, convenient, reliable, quick bite to eat.

Our appetite for this kind of food is exploding. We spend something over £10 billion a year on sandwiches, chips, burgers and the like, much of it in the independent cafés, greasy spoons and takeaways that are a fixture on high streets all over Britain. Yet despite its reach, this part of the food system is largely unscrutinised. Questions about health and sustainability, which increasingly rain down upon the supermarkets and the big fast-food chains, are seldom posed.

But there are good reasons why we should be much more interested in this kind of unchained, localised, casual catering. A lot of the food it sells is bad for us, but we seem to love it. The outlets are often friendly, neighbourhood places, providing jobs and livelihoods, but the work can be precarious, badly paid, and in extreme cases illegal. Then again, because the outlets are under threat from the same homogenising pressures that led to cloned high streets and identikit supermarkets, what you see (fresh, local, individualised) is often the opposite of what you actually get. Above all, price rules: whatever the pressure might be for the food to be 'better', we don't want to pay any more for it – and if it cost more, a lot of people wouldn't be able to afford it. So these outlets epitomise some of the contradictions at the heart of our ideas about sustainability. Efforts to protect the environment, safeguard health, and promote justice are systematically undermined by the dynamics of today's market economy.

In other words, your local sandwich shop or Chinese takeaway is a microcosm of what is troubling about the wider economy. It is more or less impossible for these outlets to source food that is healthy, fairly produced, and environmentally benign, to employ their workers in socially just conditions, and to sell at prices that people can afford or are prepared to pay. Why is it so difficult? This is the story we tell here.

# 10 thoughts to take away

- *We spend more than £10 billion each year* on sandwiches, chips, burgers, kebabs, curries, noodles and the like, a lot of it from small, independent high-street outlets.
- *It's a huge slice of the national food cake.* And it's growing. This kind of foraging is no longer marginal or exceptional – it is normal, everyday activity.
- *It is not what it seems.* For customers it seems to be quick, convenient, tasty, handy, fresh, varied, and affordable. Often, it is unhealthy, wasteful, socially exploitative, environmentally damaging, global, and homogenised.
- *Much of it is clone food.* Wholesalers provide small, local outlets with heavily processed, globally sourced, and mass-produced supplies.
- *There are big hidden costs.* It is cheap to purchase, but at a high price for customers' health, for workers, and for the environment.
- *Not many of us know or care about this.* Because it is still seen as a marginal form of catering, few people – least of all customers – mind about the downsides or take responsibility for them.
- *The sector is struggling to survive* in the face of fierce competition from the fast food giants. To keep food cheap, costs and wages are driven down to a minimum, right through the supply chain.
- *Local cafés and takeaways would go out of business* if they were obliged to serve food that was healthy, fair, and green. Many thousands of small enterprises would be forced to close. Many thousands of individuals and families, already on the edge of economic survival, would lose their livelihoods.
- *Markets trump the interests of people and the planet.* To develop a food system that is socially just and environmentally sustainable, we must first tackle the unsustainable market economics that underpin it.
- *In policy terms the sector is nearly invisible* – taken for granted, yet under the radar of official appraisal and public debate. We need a new policy debate about how to support independent, local cafes and takeaways to supply affordable food that is sustainable in social, environmental and economic terms.

# Summary

In recent decades we have developed a huge and culturally entrenched appetite for quick, cheap, convenient food that we can eat wherever we happen to be. In this report, we call this 'casual eating'. Both the habit and the food that feeds it are unsustainable.



Being casual about what, when, and where we eat is both a cause and a symptom of the hectic, mobile lives we lead. It helps to shape our aspirations and our sense of identity.

Such is the scale of the transformation that the kind of food that supports this way of eating is no longer peripheral. It represents a significant element in the food supply, with implications both for how it is produced and for our health. But although casual food is everywhere, the 'casual eating' subdivision of the catering sector is overlooked. So diverse that it can seem to defy classification, it has no shared voice or body of knowledge. Nevertheless, it requires closer scrutiny.

Casual food tends to be cheap, is often highly processed, and generates a lot of food and packaging waste. Although it is hugely popular, it is criticised for being unhealthy, and information about where it comes from or what it contains is rarely available when you buy it. Work in the sector is poorly paid, precarious, and sometimes illegal.

The whole food system is under widespread pressure to become more sustainable. Broadly speaking, the challenge is to produce more and better quality food, more ethically, from less land, using fewer resources, and with fewer negative impacts, and to share it more equitably. Efforts to make the food system more sustainable will have to take the social, environmental, and economic impacts of our casual eating habit into account.

## Our research

We investigated how our habit of casual eating squares with our ideal of a more sustainable food system. We reviewed the sector as a whole, but focused on the small, independent cafés and takeaways that still comprise the majority of outlets selling this type of food. On the face of it they represent a more sustainable way of providing casual food than the chains, in that they are local and small-scale; they can be focal points in neighbourhoods; they may employ local people and use local suppliers (thereby keeping money in the local economy), and can provide a more personal service. We asked a number of café and takeaway operators about their businesses, their concerns, and how they felt about various measures that have been suggested to make the catering sector more sustainable.

The interviewees did not feel that the food they supplied was unhealthy – the word they most often used to describe it was ‘fresh’. However, this often meant freshly prepared from frozen ingredients. They made some use of local suppliers, but also used national wholesalers for a range of menu items, from sandwich fillings and sauces to frozen items including chips, meat dishes, and desserts.

Although the provenance of the food was global, interviewees knew little about where the food came from, and did not think their customers cared. Provenance information was rarely provided in wholesalers’ catalogues. Apart from supplies for a specifically organic café, none of the food came from certified systems recognised to provide food more sustainably (such as fair trade, organic, or high animal welfare). The interviewees said their customers never asked for these, and that they were inappropriate to the type of business and too expensive.

The interviewees felt caught between, on one side, customers’ expectations that certain items would always be on the menu and their expectation that prices would be low, and, on the other side, the restriction of having to choose from what was in the wholesalers’ catalogues. Consequently, they felt they had little control over the food they sold.

Their main concerns were immediate, commercial ones. Given the scale of their operations, they felt powerless to do anything about the wider issues facing the food system, including efforts to promote sustainability. They were unwilling to pay extra to have recyclable waste collected, and did not make use of government schemes to advise businesses on sustainability. They worked long and often unsocial hours for what they recognised were relatively low wages, but many felt a strong sense of commitment to their staff.

They were not unreceptive to the idea that their practices could be made more sustainable. They felt, however, that they would need advice and support, and probably the force of regulation, in order to do so.

Overwhelmingly, cost and customers’ willingness to pay were the main factors determining how willing or able they would be to implement the kind of changes that would enable casual eating to become more sustainable.

## The issues

The casual food sector crystallises some of the contradictions at the heart of our ideas about sustainability. On one hand, the majority of outlets are small, independent businesses, providing what appears to be a highly localised service. The fish and chips, sandwiches, kormas, and fry-ups they sell are a popular and distinctive part of our food culture. The low cost of the food makes it accessible to all sorts of people. And its easy availability enables us to live busy, peripatetic lives. On the other hand, the same foods are criticised for being fattening and unhealthy. We only need them because we lead such busy, peripatetic lives. And because many of the outlets operate on narrow margins, in a relatively unscrutinised section of the food system, serving many people who cannot afford (and do not expect) to spend much on lunch, they represent some pretty unsustainable practices in terms of food provenance and working conditions.

There is some evidence that when we buy food to 'eat out' we feel absolved of responsibility for its social, ethical, and environmental impacts, and don't want to know too much about where it comes from. This is especially true of the food we eat most casually. This lack of concern on consumers' part helps explain, but does not justify, the sector's lack of transparency about the provenance of the food it supplies.

One of the main reasons why casual eating is possible is because we have such an abundant supply of cheap café and takeaway food. But cheap food comes with steep, hidden costs to the people who produce it, sell it and eat it, to the environment and to future generations.

The hidden costs of cheap food represent one aspect of the unsustainability of our casual eating habit. But the corollary – sustainable food is unaffordable except by an affluent minority – is also unsustainable. The 'affordability' of food in the UK has been achieved by keeping costs low and by 'externalising' (or omitting to count) some indirect costs altogether (such as negative impacts on workers or on the environment). If food were to reflect the real costs and externalities of its production, it would only be properly sustainable if everybody, not just the well-to-do, could afford it.

Despite inroads by fast food chains, the cafés, sandwich shops, and takeaways that sell casual food remain relatively diverse and independent. But the independence of these 'unchained' outlets is under pressure. Competition from the chains, with their economies of scale and heavily advertised brands, is intense and contributes to the pressure for cheapness discussed earlier. Ironically, pressure for sustainability may make life even more difficult for the unchained cafés, because adopting new, more sustainable practices involves time, staff and money – resources which the chains can supply more easily.

The apparent diversity and local character of the independent cafés is also under pressure from consolidation in the supply chain. Almost all cafés and takeaways obtain at least some supplies from a relatively small number of large wholesalers. These wholesalers use centralised distribution systems to provide standardised, globally sourced, pre-prepared menu items to outlets all over the country. This practice undermines the individuality of local outlets, siphons profits away from localities, and limits the owners' ability to control their menus and ingredients.

The casual food sector provides a stark illustration of how the three pillars of sustainability – social, environmental, and economic – can seem to be at odds with each other. At the basic level in cafés and takeaways, the economic element of sustainability boils down to how the businesses balance the amount they need to charge to remain solvent against how much customers are prepared to pay. This reality tends to eclipse considerations about how the food was produced, by whom, and what its nutritional value is – which represent the environmental and social aspects of sustainability. To build environmental and social sustainability into the food is likely to add to its cost – and is thus seen to undermine financial sustainability.

The paradox is that the drive for sustainability can sometimes be divisive or even counterproductive. For many small, independent cafés and takeaways, pressure to provide food that met more of the goals of sustainability could price them out of business, unless their customers were prepared and able to pay more. Alternatively, it could lead to their being taken over by the chains, which have the resources to respond more readily to demands to improve sustainability, for example by reducing environmental impacts (even though, in aggregate, the chains' impacts might still be much greater). Thus, paradoxically, pressure for sustainability could unwittingly help an inherently unsustainable business model (the global fast-food chain) to displace an apparently more sustainable one (the local, independent café).

We must therefore be careful how we define sustainability. At present, market economics routinely thwarts efforts to promote environmental or social sustainability. This is partly about cost, but also about value. Keeping social

justice at the heart of our definition, it is clear that even if food is healthy, chemical-free, low-carbon, and kind to animals, it is not sustainable if only a few people can afford it, or if the people who handle and sell it cannot make a decent living.

For all of us, this is a bad place to be. As customers, we seem to be reduced to a dismal choice. If we want cheap, fast, takeaway food, we either can go to the big chains, which have the scale, muscle and financial cushioning to be able to deliver on some of the sustainability standards we aspire to – healthier food, more information, more sustainable sourcing; or we can go to a diversity of small, local, family-run businesses that do not, at present, have the wherewithal or encouragement to make these changes. For the entrepreneurs who run the outlets, there is a risk of being further marginalised as the pressure for sustainability gains pace. There are no easy ways of solving the dilemma. But it is certainly time to cast the policy spotlight on this sector of the food system.

### **Implications for policy**

The purpose of this report is to draw attention to a neglected area of the food system and raise awareness of the issues involved. It lays the foundation for a policy debate that should now follow, because the challenges and contradictions the report highlights require careful and balanced consideration, and need to involve many interests and points of view. The suggestions below are offered to help point the way.

*A mainstream issue.* The scale of the casual food sector and the strength of our casual eating habit are such that this can no longer be treated as a marginal activity. It should be a major concern of policy makers and all those interested in the quality and provenance of the food we eat.

*A challenge for economic policy.* If sustainability is the overarching goal of food policy, there needs to be more honest scrutiny of the potential contradictions within that ambition. In particular, of the three 'pillars' of sustainable development (society, environment, economy), the demands of the market economy cannot be met at the expense of social justice or environmental stewardship.

*Change market mechanisms.* We need a better understanding of what prevents most local outlets from providing affordable and sustainable takeaway food – and what could be done by government and business to support viable alternatives.

*Support small local businesses.* Small, independent cafes and takeaways should be recognised as vital elements in local economies. To stay genuinely local, diverse and independent, they may need targeted, supportive policies to ensure the survival of local supply networks and the availability of appropriately skilled local workers, and to raise the awareness of local customers.

*Slow down and rethink the value of 'convenience'.* Our growing reliance on cheap fast food is a symptom of hurried lives and an economy that demands long working hours and relentless consumerism – all driving us to put 'convenience' before quality and sustainability. A move towards shorter working hours and less materialist lifestyles could begin to shift the pattern of demand.

# Introduction

Food is our most basic necessity. It ties us to the Earth's productivity and underpins many of our social and economic arrangements.

The systems by which we feed ourselves reach into all our lives and around the world. They have impacts on our quality of life, our health, climate change, how we use the land, how we work and how we share the products of our labour. The way we eat is thus a kind of test bed for the transition to a greener, fairer future – a more sustainable future, in other words. If we are to learn to live differently, we must learn to eat differently.

And the food system has, indeed, come under great pressure to be more sustainable – to provide healthier foods, take better care of the environment, and treat people and animals more ethically. But our eating habits are contradictory. The explosion in retail sales over recent years of specifically 'ethical' foods, such as organic or fair trade goods, has been widely publicised. At the same time, though less noticed, our appetite for cheap, ready-made, portable food has also been growing steadily. This reflects our habit of eating ever more casually – grabbing meals and fitting them into our busy lives wherever we happen to be, eating some and chucking the rest away (including packaging and utensils), not stopping to wonder about the food's provenance, or nutritional value, or to ask how it can possibly be so cheap. This is a way of eating that crystallises some of the most unsustainable aspects of our way of life.

This report investigates how our habit of casual eating squares with our ideal of a more sustainable food system. It focuses on the small, independent sandwich shops, cafés, chippies and takeaways that still comprise the majority of outlets selling casual food, in spite of inroads by the fast food chains. These small, often family-run businesses are a familiar sight on our high streets and provide a distinctive part of our diets. They feed many of us on a daily basis, selling some of the most popular and least healthy food around, and they include some of the most marginal businesses and least-well-paid workers in the food system. What does the quest for sustainability look like from their perspective?

We found a wide gulf between these businesses' scope for action, and the aspirations of wider society for a sustainable food system. In the face of relentless pressure from customers to keep prices low and menus constant, and hamstrung by a supply chain that increasingly pre-selects the foods they sell, the café owners we interviewed felt powerless to change. They couldn't afford to operate more sustainably; they didn't feel they had the options or knowledge to do so; and they didn't believe their customers wanted them to or would be prepared to pay for it.

Their predicament (and ours, as their customers) illuminates some of the contradictions in our approach to sustainability. They spring from our attitudes to time, work, convenience, and affordability. They raise difficult questions about how much money, time, and work we should expect (and be able) to expend on the things we value, and how justice is served by our choices.

Conflicts between values and cost, between profit and well-being, are not unique to the food system. But this research illustrates a stark example, in the throwaway economics that has given birth to the takeaway food sector. It also suggests that the quest for sustainability, notwithstanding its laudable goals, can become a divisive rather than inclusive process. The danger is that our contradictory impulses, on the one hand for a sustainable food system and on the other for cheap, convenient, take-away food, will entrench inequalities in the way we eat and injustice towards the people who feed us. There are real dilemmas here, where choices have to be made not between 'goods' and 'bads' but between what seem to be competing 'goods'. Negotiating these difficult choices, in the microcosm of the café and in the wider economy, is the fundamental challenge of sustainability.

## Food on the move

Of all the changes in our eating habits that have taken place in recent decades, the transformation in our attitude to eating out is one of the most far-reaching.



Although we still go to restaurants to celebrate special occasions, eating away from home is now a much more common and less formal occurrence, whether it involves a sit-down meal in a noodle bar, a sandwich at work, or a kebab at the bus stop.

We spend something over £30 billion a year on eating out (excluding alcoholic drinks), up by 23 per cent since 2003.<sup>1</sup> According to the Food Standards Agency (FSA), one in every six meals is now eaten outside the home, accounting for about a third of all the money we spend on food and non-alcoholic drink. If snacks are included, men consume about a quarter of their calories while eating out, and women a fifth.<sup>2</sup> Only 6 per cent of us never eat out or buy a takeaway.<sup>3</sup>

This trend has two big implications. One is that the quality of the food we eat away from home has a big impact on our health (and weight). The other is that the 'catering chain', which provides this food, and which has lagged behind the retail chain when it comes to telling customers where food comes from and how it was made, plays such an important part in the overall food supply that it needs to come out of the shadows.

'Catering' covers everything from staff canteens and posh restaurants to greasy spoons and coffee chains. From this huge and diverse sector, this report focuses on one of the biggest and fastest-growing sub-divisions, and the one that has probably attracted most criticism for its standards of food quality. It comprises what is variously described as takeaway, fast or quick-service food, and it includes the sandwiches, pizzas, baps, wraps, burgers, kebabs, baked potatoes, bags of chips, chow meins, and chicken tikkas that we buy when we need something tasty and reasonably cheap, to eat pretty quickly, maybe in the café, but quite possibly somewhere else – in the office, out of doors, in the car, on the street, on the bus, sometimes at home.

**Figure 1: Sales in the UK eating out market, 2008<sup>4</sup>**

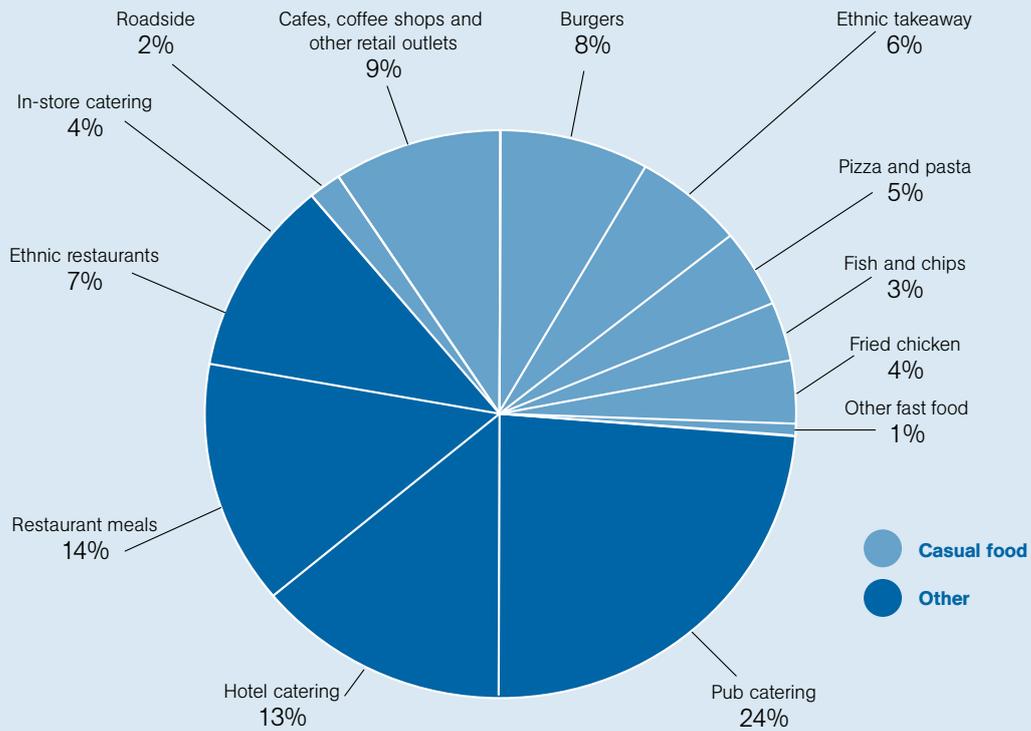


Figure 1 shows that the food we buy from quick service restaurants, takeaways, cafés, hotdog stands and so on accounts for over a third of our total expenditure on eating out – more than pub food, which has soared up the table in recent years, and much more than restaurant food. This means we spend more than £10 billion a year on sandwiches, chips, burgers, takeaways and the like,<sup>5</sup> which is five times as much as the government spends on providing food for public institutions such as schools, hospitals, and prisons.<sup>6</sup> Figure 1 also shows that the traditional British favourite, fish and chips, comes behind burgers, ‘ethnic’ takeouts, pizza, and fried chicken in the rankings. In 2009, it was reported that the Chinese meal had displaced the curry as the nation’s favourite takeaway.<sup>7</sup>

### Casual eating

A good catch-all term for this kind of food is ‘casual’, because although we want it to be tasty, we don’t seem to want to care much about it. Speed of preparation, and sometimes also of consumption, is a crucial characteristic, and another is portability – it comes ready to eat from the wrapping, so you can ingest it wherever you happen to be, and if necessary while doing something else. It also tends to be cheap (though not necessarily cheaper than cooking from scratch at home, if you have the necessary skill and access to a kitchen). These qualities are rolled up in the idea of ‘convenience’, which has been one of the most important forces shaping our diets and eating habits for the past half-century.

Our growing preference for ready-made food reflects a wider trend towards spending on services rather than goods (up from a third to more than half of household expenditure between 1970 and 2008).<sup>8</sup> Social and economic factors have played a part (a more affluent population, more working women, less time devoted to food preparation at home), as well as technological changes (such as the microwave oven, and manufacturing processes that produce frozen or vacuum-packed ready-to-heat meals).<sup>9</sup> Agricultural systems that reliably produce large quantities of cheap raw materials are also a prerequisite.

Our higher selves may lament these developments – the Slow Food movement was born in protest at this reduction of the arts of cooking and eating to the level of mass refuelling – but that hasn’t dampened the popularity of casual eating. The fast food sector grew by a fifth in the five years up to 2008, with fried

chicken showing the biggest increase, up by 36%.<sup>10</sup> Almost two billion meals a year are now served in quick-service restaurants.<sup>11</sup> Although expenditure on eating out dipped at the beginning of 2009, when the recession began to bite, there was evidence that fast food might buck the trend, as people 'traded down'. While other food sectors curtailed spending, Domino's, Greggs, Pizza Hut and Subway all announced plans to expand.<sup>12</sup> In January 2010, McDonald's UK announced that sales had gone up by 11% in 2009, and that the company was so optimistic it was planning to open 15 new branches and create 5,000 jobs.<sup>13</sup>

It sometimes seems that casual food *defines* our food culture – we are sitting on our sofas watching Hugh Fearnley Whittingstall butcher suckling pigs while we wait for our pizzas to be delivered. Ready-cooked, easy-to-eat food facilitates our lives, at home and at work. In March 2010, Just-Eat, a national online takeaway ordering company that delivers 40,000 meals a day, reported that its biggest customers included fire and police stations, doctors' surgeries, and hospitals (140,000 meal orders in the previous 12 months).<sup>14</sup> Another survey found that nearly a third of children under three ate at least one takeaway a week.<sup>15</sup> Casual food even featured in the 2009 expenses scandal, when a senior official at a Scottish government agency was forced to resign after spending nearly £5,000 of public money on takeaway meals.<sup>16</sup>

And like any powerful cultural phenomenon, casual eating provokes strong and contradictory feelings. Although almost everybody does it, some forms of it are stigmatised. For example, when Jamie Oliver, the TV chef, decided to try and teach the people of Rotherham, in Yorkshire, to eat more healthily, footage of a mother who lived on benefits and routinely fed her five-year-old daughter takeaway kebabs provoked a storm of criticism, as did images of defiant women passing burgers to their children through school fences, in protest at the healthy school menus Oliver had introduced. Dependence on convenience food, the criticism implied, was a sign of ignorance and poor parenting; the imposition of 'healthy' meals, the defiance suggested, was patronising and arrogant. One local authority has reportedly asked parents of children starting school how often their children are given takeaways and fizzy drinks, as an indicator of potentially problematic behaviour.<sup>17</sup>

For other groups, though, casual eating – the experience of being able to eat without effort or worry – is a more positive experience. For the poor, it can mean being able to eat the way the rich have always done; for people who can't or don't want to cook for themselves, affordable ready-made food means independence. Its very uniformity is equalising: a Big Mac is the same whether you are rich or poor. In their book *The Spirit Level*, which examines the corrosive effects of social and economic inequalities, Richard Wilkinson and Kate Pickett quote a recent immigrant to the USA from Puerto Rico, who told the *Wall Street Journal* why she and her family loved their twice-a-month treat of eating fast food: 'We feel good when we go to those places ... we feel like we're Americans, that we're here and we belong here.'<sup>18</sup>

### Small food

One striking thing about the businesses that sell this kind of food is that a high proportion of them are small, independent, often family-run concerns. This is not to say that there are no giants, and no proliferation of indistinguishable outlets, selling identical meals, in towns across the UK and indeed around the world. Chains account for 54 per cent of UK quick-service sales, and dominate in the categories of burgers, fried chicken, pizza, and sandwiches.<sup>19</sup>

But everywhere, so far, we can still find 'unchained' cafés, selling fish and chips, Indian or Chinese takeaways, kebabs, sandwiches, cheese or bacon rolls, cakes, hot drinks, and the typical eggs, beans and chips of the traditional British greasy spoon. There are an estimated 8,500 fish and chip shops, more than 11,000 Chinese takeaways, and thousands more Indian takeaways, chicken shops, kebab grills, sandwich shops and cafés.<sup>20,21</sup> In premises ranging from the trim to the insanitary, their owners (who usually run them) preside over deep fryers, rotating doners, blackened grills, heaps of granary baps, and assorted tubs of mayo-laden sandwich filling. Sometimes a bowl of bananas and red, waxy apples sits on the counter top. Sometimes there are side salads.

In their unobtrusive way, these cafés and carry-outs are characteristic of a particularly British way of eating. Although their menus are similar, they nevertheless preserve an individuality that is the antithesis of the chains' 'system restaurant' model, which is designed to ensure that outlets provide the same products, made by the same processes, in the same ambience, wherever they are located. The one-off, independent cafés and takeaways may, however, be an endangered species. The chains, with their buying power, economies of scale, and whopping advertising budgets, are squeezing them hard. So are rising food prices and fuel costs. As a result, many of the small enterprises operate on the very margins of profitability.

This has two inevitable consequences. One is that the food they buy has to be cheap, with knock-on effects for the people who eat it and the people who produce it. The other is that labour in the outlets themselves has to be cheap. Food workers are among the worst paid in any industry, and fast-food workers among the lowest paid of all. The work is seen as lacking status and skill, and consequently attracts people at the threshold of employability. In the ethnic takeaway sector, in particular, a shortage of appropriately qualified workers willing to do the job for the wages available has led to a dependence on 'irregular' workers. These may be family members working unpaid, uninsured, and sometimes unwillingly; or migrants working outside the terms or beyond the expiry of their visas; or 'undocumented' migrants who are invisible to the formal economy and therefore vulnerable to exploitation by employers. It has been estimated that a quarter of the businesses in the Chinese catering sector could fail if illegal migrant labour was not available.<sup>22</sup>

### **Catering emerges from the shadows**

Until recently, whenever a food-chain scandal blew up – whether it was about the nutritional value of food, the poor treatment of workers, the environmental impacts of global sourcing, or mislabelling – it tended to be the big retailers, whose names are so much more familiar, that writhed in the spotlight. Catering has lagged in its response to demands for more ethical or sustainable food. One reason has been the view that consumers prefer to leave their consciences at home when they eat out. A Mintel survey in 2007 found that just 2 per cent of respondents said ethical considerations were important when they were choosing a place to eat.<sup>23</sup> Other surveys have found higher levels of interest, but also a significant number of people who actively do not want information about the food's provenance or ingredients, perhaps because they want to feel that eating food procured and prepared by others absolves them of responsibility for issues that usually concern them.<sup>24</sup>

This presumably helps explain the caterers' lack of 'transparency', or openness and accountability. While the retailers have assumed the role of 'gatekeepers' of the food supply, and have learned to fear the damage to their reputation that any scandal about sourcing or labour exploitation can cause, the workings of the catering sector have remained hidden from view. Upmarket eateries may go to poetic lengths to describe their food's provenance, but these establishments are the exception. Rare indeed is the café or takeaway that tells you where the bacon in the rolls or the chicken in the chow mein comes from. And the owners know that customers will turn a blind eye to the possibility that the cooks and delivery drivers are earning less than the minimum wage.

Increasingly, though, the caterers are being called on to raise their standards on a whole range of issues, from the use of local, seasonal ingredients to paying staff a decent wage. And some of them are doing so, in response to a range of carrots and sticks from government and pressure-groups. Nearly all the big catering companies mentioned in this report have sections on their websites discussing their corporate responsibility plans, the steps they are taking to cut energy, reduce waste, source more ethically, and so on. Complying with this kind of regulation is much easier if you have a big budget, a large staff, and the wherewithal to generate some good PR in the process. For example, two full-page advertisements in the news magazine *The Economist* in the summer of 2010 described the achievements of McDonald's UK division in this regard. The adverts stated that the company sources all beef, free range eggs, organic milk, most potatoes and salad in season from more than 17,000 British and Irish

farmers, adheres to 'industry leading' animal welfare standards, and in 2009 enabled more than 8,000 of its employees to study for qualifications while they worked.<sup>25</sup>

This is hard for the small cafés and carry-outs to match. On the face of it, they represent a more sustainable way of providing casual food than the chains, in that they are local, small-scale, and can be focal points in neighbourhoods; they may employ local people and use local suppliers (thereby keeping money in the local economy), and can provide a more personal service. But these qualities are hard to measure. When it comes to sourcing more ethically produced foods, conducting energy audits, or paying for staff training – the sort of things that can be regulated and monitored – the small companies come up against a lot of barriers, such as shortage of cash, time, staff, and knowledge, customer resistance (and no promotions budget to overcome it) and above all a lack of confidence that their customers will be willing to pay more for 'better' food.

Paradoxically, this could lead to the small, independent cafés, sandwich shops, greasy spoons, and takeaways, which currently meet what is clearly an important need and provide something we value, being left behind by the current impetus to make the food supply more sustainable. They could end up providing the cheapest, least ethical and least healthy food around, while the chains improve their standards (and there is already evidence that food from fast food chains is relatively healthier than the equivalent from independents).<sup>26</sup> They could be pressurised to become more like the big chains (standardisation by their suppliers is already bringing this about, and many independent cafes now imitate the appearance of chain outlets), or even be taken over and run as 'local' branches of large corporations, as has already happened in the grocery retail sector. Alternatively, if more sustainable sourcing led to higher prices for casual food, then fewer people would be able to afford to feed themselves as effortlessly as they can at present. These seem undesirable by-products of the drive for a more just, local and human-scale economy. It's a case of being careful what you wish for. It's also an illustration of how sustainability can seem to face different ways at once, with its objectives apparently in conflict. But however intractable it may seem, the goal of becoming more sustainable is the defining challenge for the food system.

### **Food and sustainability**

The 'food system' encompasses all the activities involved in growing, processing, manufacturing, distributing, serving, and selling food. The adverse impacts of this system, known for decades, are now seen to be at crisis point: the exploitation of workers, the low value placed on animal life, the damage to the environment, the effects of climate change, and the recognition that even as the world's population expands, the natural resources on which food production depends are being depleted. The existence of a billion overweight and obese people alongside another billion who do not have enough to eat is an affront to justice. And there is growing realisation that the foods being produced are not best suited to maintaining healthy human beings.<sup>27</sup> The challenge, therefore, is to produce more and better quality food, more ethically, from less land, using fewer resources and with fewer negative impacts, and to share it more equitably – this, broadly, is what is meant by the transition to a more sustainable food system.

In the UK, both the scale of the task and the scope for improvement are enormous. The food system employs around 3.6 million people (14 per cent of the workforce), many of whom are among the lowest paid workers in the economy. It determines how three-quarters of the land area is used, accounts for 25 per cent of HGV kilometres of road use, is a significant consumer of water and energy, a major producer of waste, and is responsible for 18 per cent of greenhouse gas emissions. And because the UK imports nearly 40 per cent of its food, as well as large proportions of the agricultural inputs and animal feed used to produce the rest (not to mention oil and gas), our food supply is also inextricably linked with a global workforce and supply system which amplify these impacts.<sup>28</sup>



Pressure for change has come from government, civil society groups, and consumers. The first UK government document calling for sustainability to be the cornerstone of food policy was the *Strategy for Sustainable Farming and Food*, in 2002. Since then there has been a succession of reports, including the *Food Industry Sustainability Strategy* of 2006, which included recommendations for the catering sector.<sup>29,30,31,32</sup> At the same time, consumers have become increasingly concerned about the provenance of their food, and consequently retail sales have soared for foods produced to higher-than-average ethical standards. The Co-op's annual *Ethical Consumerism Report* for 2008, for example, showed that in the previous year alone expenditure on ethical food and drink increased by 14 per cent, to £5.8 billion, with by far the largest increases in fairly traded foods, Freedom Foods (with higher standards of animal welfare), and sustainable fish.<sup>33</sup>

Such is the strength of the idea of sustainability that it is now unusual for a report on food from any organisation, whether public, private or non-governmental (NGO), not to include sustainability as one of its goals. The problem is that the term is used in a variety of different ways, and these sometimes seem to be in conflict. As it happens, our casual eating habit crystallises some of these contradictions.

In essence, sustainability is about fairness. It is about meeting our needs without jeopardising the ability of future generations to do the same. Ever since it was first laid out as a framework for human development, in the Brundtland report of 1987, it has not simply been about living within environmental limits, but about sharing the Earth's resources responsibly and equitably, within and between generations.<sup>34</sup> In other words, it is a moral project as well as a practical one.

This is explicit in the UK's 2005 sustainable development strategy, which says that 'a world disfigured by poverty and inequality is unsustainable'.<sup>35</sup> By then, however, the definition of sustainability had been elaborated. Following a world summit on sustainability in 2002, it came to be understood to incorporate three 'pillars': environmental, social and economic.<sup>36</sup> Reflecting this tripartite definition, the goals of the UK sustainable development strategy include 'living within environmental limits (environmental), creating 'a strong, healthy and just society' (social) and achieving a 'sustainable economy ... which produces prosperity and opportunity for all' (economic).<sup>37</sup> In the same vein, the government's recent sustainable food strategy, *Food 2030*, lists as its first priority to 'enable ... people to eat a healthy, sustainable diet', and as its second to 'ensure a resilient, profitable and competitive food system'.<sup>38</sup>

No one has yet defined what a 'sustainable diet' (as distinct from a sustainable food supply) would consist of, although this has been identified as a priority for government.<sup>39</sup> Based on some of the above definitions – to be healthy and

just, for example – it might have to consist of food that was nourishing (that is, would support health, rather than undermine it), produced in environmentally benign ways, equally accessible to everyone, and not dependent on the use of exploited workers. But food that met another of the requirements for sustainability, i.e. that it was produced by profitable and competitive food businesses, might not be able to be any of these things, because the costs entailed would undermine profitability and competitiveness. So these two types of sustainability seem to contradict each other.

This apparent conflict between the aspects of sustainability is not unique to the food system, but because of food's central place in our lives and livelihoods, the trade-offs seem particularly glaring. The negative environmental impacts of intensive food production are now widely acknowledged, but where correcting them adds costs to the production process, environmental sustainability tends to lose out to the goal of economic sustainability. Paying workers more – in fields or fast food outlets – also makes food more expensive, so this social aspect of sustainability is also likely to give way to economic considerations. It is as though efforts to protect the environment, safeguard health and promote justice are systematically undermined by the dynamics of today's market economy.

This brings us back to casual food. One of the main reasons why casual eating is possible is because we have such an abundant supply of cheap food. This is not an accident. After centuries of living in fear of famine, and in particular after the shock of wartime shortages, the explicit goal of British (and European) post-war food policy was to secure a plentiful supply of food for everybody.<sup>40</sup> For food to be cheap, however, the resources used to make it (such as land, water, fuel and labour) also have to be cheap, and any negative impacts or by-products (such as greenhouse gases, the reduction of biodiversity, water pollution, animal suffering or the exposure of workers to harmful chemicals) in effect have to be cost-free to the producer – the so-called 'externalities' of the system. With these conditions, wherever in the world they are to be found, it is possible to produce, on a large scale, the cheap starches, oils, animal proteins and sweeteners that are the building blocks of casual diets. With hindsight, this seems the antithesis of a sustainable food production system.

Moreover, if this cheap, ubiquitous high-energy food displaces more nutritious foods from our diet, our health is likely to suffer, and we may eat too much of it and get fat. We are so casual about it, that we can just eat what we want and throw the rest away – a disastrous waste of all the resources used to produce it, and a horrible devaluation of the labour that went into it. In this way, casual eating seems to wrap up many of the least sustainable aspects of our way of living.

Some of the steps farming and food businesses have taken to meet sustainability goals, such as cutting energy use and reducing waste, are 'win-wins', in that they save costs as well as reducing impacts. But it seems unavoidable that food produced to high environmental and animal welfare standards, by farmers who are paid a realistic price and workers who earn a fair wage and are protected by secure employment laws, is likely to cost more, because it involves more people, more care and more time. The cheap food that makes our casual eating habit possible is unsustainable. But the corollary, that sustainable food is unaffordable except by an affluent minority, given its implications for public health and social justice, is also unsustainable.

## The view from behind the counter

We interviewed café and takeaway owners in south London to find out what the quest for sustainability looks like from their point of view.



On a south London street that has more cars than pedestrians, a heavy, grey-haired man runs his eyes over the sports pages of a tabloid paper between serving customers and issuing instructions to a couple of shuffling, middle-aged waitresses. There are four rows of Formica-topped tables. At one or two of them people are drinking tea or eating from plates streaked with orange, yellow, and red – beans, egg, and ketchup – but it is mid-afternoon, a relatively quiet time. The proprietor is a Turkish Cypriot, whose English is still heavily accented even though he has worked here for many years. He describes his business as a 'traditional English café' selling 'traditional English café food'. He has been here for 28 years, having taken over what was already a café from an Italian family. He never varies the menu – that is 'trouble', he says – but provides innumerable permutations of bacon, burgers, steaks, eggs, and mushrooms, on plates or in rolls. He knows many of his customers by name, and keeps a stern but not unfriendly eye on the rowdy girls from the local secondary who come in for takeaway chips after school. Through his café's steamy windows, he has watched this neighbourhood change. As local businesses, including a garage and a big pub, have closed down, his customer base has shrunk, and it has been further eroded by the large number of new cafés that have started up in the area – some without the appropriate licence, he claims, and many of which fold as suddenly as they appear. He is a local fixture; when he retires, in a few years' time, he will probably sell the business to another caterer, so customers will still come in and sit at these tables.

Not far away, another café is run by a daughter and her parents. This one is more upmarket. There are a few wooden tables, but most customers take the food away – sandwiches, quiches, or thick slices of Victoria sponge. The daughter went to catering college – unusual among the people we interviewed – and the family used to run a bigger catering business. She feels somewhat frustrated by the limitations of running a sandwich and cake shop in an area where her customers tend not to want to spend very much. The food here is much more imaginative than run-of-the-mill café fare, and (also unusually) most of it is made from scratch on the premises. But the owners feel that their insistence on using higher quality ingredients (though still not as high as they would like) and their commitment to paying trained staff high enough wages to retain them erodes their profit margins and may be threatening the café's viability.

Another business in the neighbourhood – a Chinese takeaway – is run by a husband-and-wife team on the very edge of insolvency. Immigrants from north-east China, the couple have been running the restaurant, which they rent from another Chinese migrant, for two years, although the premises have been used by Chinese catering businesses for 60 years. The woman, who has been living in Britain for six years, spent the first two years working in a Chinese restaurant kitchen and then set up an employment agency. The couple's dream was to run a restaurant and takeaway, but they are finding it hard. They had to pay a £10,000 deposit to the landlord for three years' use of the premises, and have to pay monthly rent and bills on top of this. Weekly profits are around £80–£100, £300 at best; and there are many weeks in the year when they make no profit at all after their bills have been paid. They cannot afford to pay their staff even the legal minimum wage, and have to buy all their supplies from a single supplier, who is willing to give them credit. Their health is suffering, and they are considering giving the business up when their lease expires, and finding another occupation.

### Who we interviewed

These are just three of a diverse group of south London café owners we interviewed to explore the question of how our appetite for cheap, convenient, portable food can be squared with our aspiration for a more sustainable food system. The kind of food they provide is integral to our lives, and yet looked at another way seems to represent an unsustainable way of eating. We wanted to find out what these issues look like from their perspective. Given the limits of time and budget, the study could only be exploratory, but it threw up issues that go to the heart of what we mean by sustainability, and what sustainability may mean for us. This section presents the findings from our interviews. The next section looks at some of the underlying issues in more depth.

All of the people we interviewed ran small, independent food businesses that were not part of chains, and in most cases were owned or co-owned as well as run by the person we interviewed. They included greasy spoons, sandwich shops, takeaways, and a kebab grill. They all prepared food to be taken away and eaten off the premises, though some also had eat-in areas and menus. They sold breakfast, hot drinks, snacks, lunch, and dinner to people who work and live in the neighbouring streets. Best-selling items included fried breakfasts, sandwiches, baked potatoes, baps, lasagne, soup, doner kebabs, and noodle dishes. The price of a cup of tea ranged from 45p to around £1.

The interviewees were a diverse group – British, Vietnamese, Italian, Turkish Cypriot, Bangladeshi, and Chinese – and family partnerships were common. Businesses were owned and/or run by husband-and-wife teams, siblings or wider family networks. The longest-serving interviewee had been trading from the same premises for 31 years, the shortest for five months. Long and irregular working hours were the norm: 7am starts were typical, six-day weeks and 9- and 10-hour shifts not unusual, and one café opened overnight, from midnight till 11am. The smallest number of staff was two (a husband-and-wife team), the largest eight. Several of the cafés occupied sites that had been used by food businesses for many years, suggesting a local continuity of food provision. Some had been audited by the local authority for their standards of food hygiene and had been awarded a 'score on the door', where a higher number of stars (out of five), means a higher standard of hygiene and food safety. The businesses we interviewed had scores ranging from no stars to four stars.

We asked the interviewees about their suppliers, what sort of food they bought, what they thought their customers were looking for, what they saw as the main issues facing their businesses, and whether they were aware of pressure for the whole food supply to become more sustainable. We also asked how they would feel about implementing some of the changes that have been suggested to make food eaten away from home more sustainable. These include: using locally sourced food where possible, adjusting menus to reflect seasonal availability, using foods from certified systems such as organic or Fairtrade; reducing the amount of salt and fat in recipes; providing nutritional information; using recyclable material for carry-out packaging; paying a fair wage and providing good working conditions; and telling customers, via signage, that the business took these issues seriously and was acting on them (promoting itself as a sustainable enterprise, in other words).



### About the food

We asked the interviewees how they would describe the food they sold. Not surprisingly, most did not see themselves as providing food that was unhealthy. For example, most of them said they added little or no salt to the food as they cooked it, preferring to leave this to customers, and several pointed out that they grilled things like sausages and bacon, which uses less fat than frying, and cut the fat off bacon unless customers asked them to leave it on. Most said or implied that what they provided was what customers wanted, and customers could make their minds up about what they wanted to eat. But healthiness was not a priority.

The word interviewees used most often to describe the food they sold was 'fresh': 'freshly prepared on the premises', 'very fresh', 'every order cooked fresh', sandwiches 'freshly made every day'. The other aspect that was valued was the simplicity and unpretentiousness of the food: interviewees used the terms 'traditional', 'simple', 'every-day', 'nothing too fancy', 'traditional English café food', 'food for the working man', 'filling', 'wholesome'. Quick service was also a high priority, and hygiene was a preoccupation for some of the interviewees.

*'Our customers are looking for simple, nice-tasting, fresh food.'*  
Sandwich shop owner

Most of the interviewees used the word 'tasty' to describe the food they provided, and ate their own food with pleasure. But for a few the quality and taste of the food seemed irrelevant. 'Our customers are looking for convenience, they are not fussed with the quality or authenticity of the food', said a takeaway owner. 'They come to this takeaway because of the speed of the service and the locality.' In fact two of the Chinese takeaway operators interviewed said that they prepared a kind of food that they did not like to eat themselves, because it was adapted to British tastes by adding sugar and monosodium glutamate (MSG: a flavour enhancer). One interviewee said her customers expected this but she never used it when cooking for her family. 'This food is just for the local people, not for the Chinese', she said.

### **Cost/price was by far the most important factor**

Price was by far the main factor governing what these food businesses bought and sold – on one hand the cost of the ingredients and on the other the amount customers were prepared to pay. Almost all the interviewees mentioned ‘quality’ as something both they and their customers were looking for, but it was always qualified by price.

*‘Pricing is the number one issue for the business.’*

Café manager

The qualities on which all the interviewees judged their suppliers were quality, price, and service. When asked what customers were looking for, cheapness usually featured: ‘good value food’, ‘quality at an acceptable price’. Interviewees didn’t necessarily buy the cheapest on offer – one café owner bought the dearest type of sausage, and another said his customers liked Heinz beans and ketchup, so he paid extra for these – but there was always a balancing act between cost and quality. One interviewee felt some of her suppliers provided a quality of food that was too expensive for her customer base, so that her food costs eroded her profit margin.

*‘These are hard times. People are looking for good value.’*

Sandwich shop owner

Most of the businesses had prices printed on the menu, so they couldn’t be changed easily to reflect increases in costs – these had to be absorbed until it became worthwhile to alter the printed menus. It was thought that price rises could put customers off. Margins were narrow, competition intense (several interviewees commented on the growing number of start-up food businesses in the area), and customers very price-conscious, especially in the current recession.

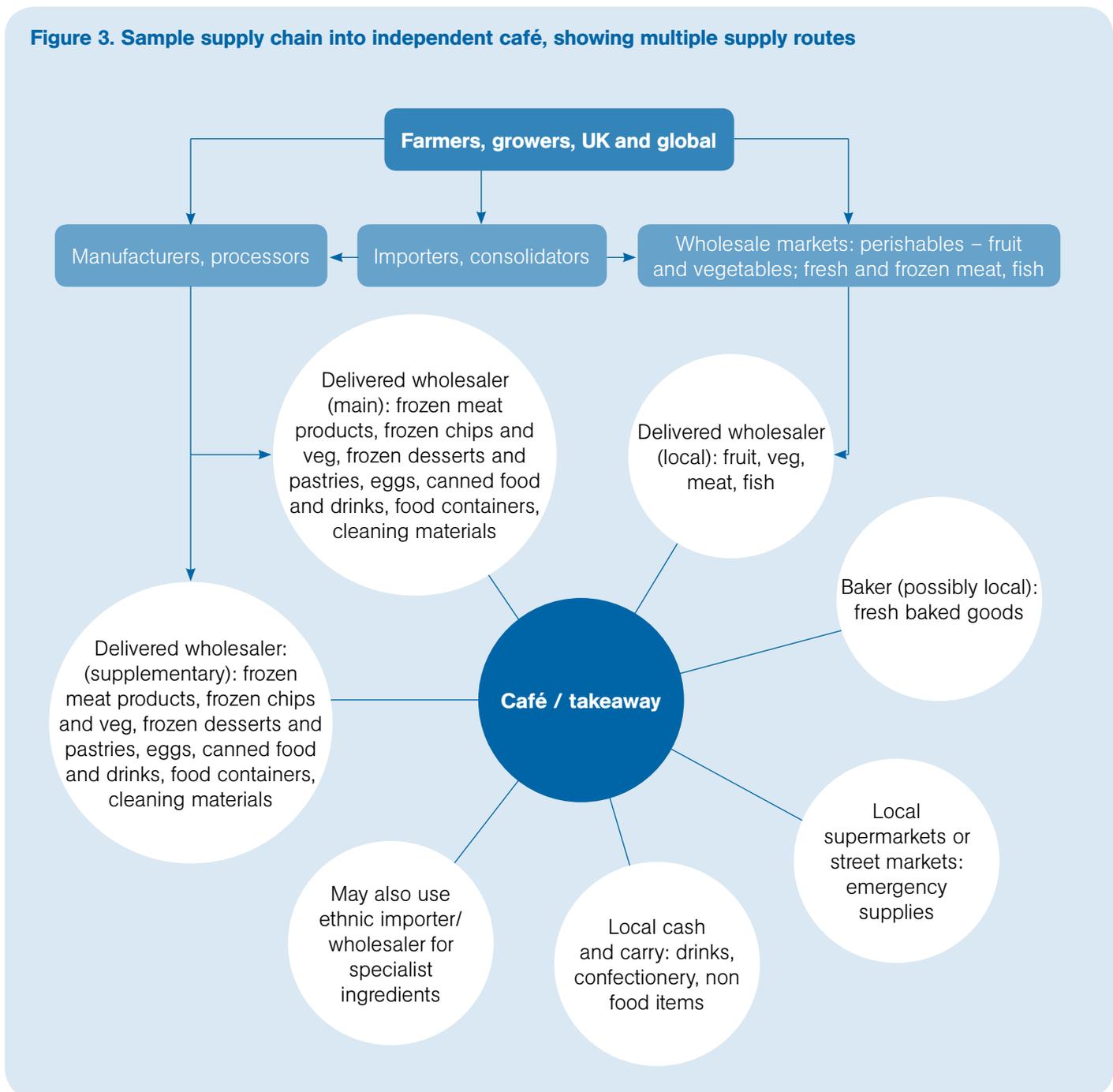
### **Supply networks were diverse, but the foods ordered were similar**

Most of the businesses used a small number of trusted suppliers, whom they knew personally, often over periods of many years. Dependability of supply is life or death to a small food outlet, and interviewees needed to know that when they phoned through an order (most interviewees were hesitant internet users), the right goods would arrive on time. They also needed suppliers who would deal in small enough quantities to suit the businesses. They used a variety of methods to find suppliers: word of mouth, inheriting them from a previous business, advertisements in the trade press.

The suppliers typically included at least one big ‘delivered wholesaler’ – most often Booker, Nila, or JJs. These companies buy food from manufacturers and importers, consolidate it at their (often huge) warehouses, and then deliver it to caterers and small retail outlets (the big multiple retailers have their own supply chains). Businesses used them for frozen goods (burgers, chicken portions, desserts and chips), drinks, and non-food supplies, like cleaning materials and packaging. Each business also used a number of ‘micro suppliers’ – small companies consisting in some cases of just an individual with a van, which buy from wholesalers and deliver to outlets. These supply some of the same things as the big wholesalers, but tend to specialise in perishable goods – fresh meat, eggs, milk, bread, prepared sandwich fillings, vegetables, and fruit.

Most of the businesses also used cash-and-carry outlets for some goods, such as canned drinks, confectionery and other non-perishables, and even local supermarkets, when items like milk or eggs ran out (and sometimes because they offered better value and freshness). Some also used specialist suppliers for ‘ethnic’ foods – the ingredients for Indian, Chinese, or Vietnamese food. The networks of suppliers were quite idiosyncratic, and although the businesses interviewed were all in one area of London, there was surprisingly little overlap between the micro-suppliers used. Figure 3 illustrates a sample supply chain, showing how many different suppliers one small food business can use, but it should be remembered that this diversity masks homogeneity: the cafés are using different routes to access the same sort of food, which upstream from them may come from the same sources.

**Figure 3. Sample supply chain into independent café, showing multiple supply routes**



*'I use Bookers and Nila for drinks and water. Veg and meat and sandwich mixes I get from two brothers, one does meat and the other veg from the [wholesale] markets. I get minted lamb, salt beef and dill and Italian chicken ready-made, but most I make fresh in the shop every morning. The deliveries come three times a week, so things can be very fresh. The chicken and beef come ready-cooked in vacuum packs, in liquid that you throw away when you open the package. The coffee and chocolates have powdered milk; so we only use one big container of milk a day and I get that from the man who runs the newsagent's opposite, in return for a mixed salad.'*

Sandwich shop owner

**Most interviewees knew very little about the provenance of the food**

Beyond knowing which wholesaler or wholesale market it came from, most interviewees said that they knew little or nothing about where the food came from or how it had been produced.

*'I don't think about where the food comes from, that's the truth. It doesn't worry me enough at the moment.'*

Café owner

Some had read the labels on freezer bags or boxes, and knew that their meat, for example, could come from Australia or Brazil, and the vegetables from Holland.

*'I get a box of chicken from the butchers and all I know is it's got an EU stamp on it.'*

Café owner

But none of the interviewees specified any particular provenance when ordering, apart from the organic café manager, who only dealt with organic suppliers. Another interviewee, the owner of a slightly upmarket sandwich shop, cared about provenance (for example, she would prefer to use free-range chicken) but didn't think her customers would be prepared to pay the higher price. On the other hand, one café, which sold very cheap tea and only instant coffee, had his tea specially blended for him by a local supplier. On the whole, though, it was much more important to have a good working relationship with the company that delivered the food than to know details about where it came from or how it was produced.

*'I've no idea where the supplier gets the food from. It's never occurred to me to ask. It might be on the packaging.'*

Sandwich shop owner

### **The provenance was not thought important to customers**

Almost all the interviewees said that their customers 'didn't care about things like that'. Again, the main exception was the manager of an organic café.

### **In fact, the provenance of the food was geographically very wide, but almost none of it came from certified production systems**

Illustrating how cheaply food can now be traded globally, the web of supply included prawns from Vietnam, chicken from Brazil, beef from Australia, Brazil, or Poland, oil from Africa, vegetables from Holland and southern Europe, bacon labelled 'EC', specialist products from China and Vietnam, as well as produce and meat from the UK. Apart from in the organic café, none of the food came from certified production systems that promote sustainability.

### **The interviewees felt they had little control when buying supplies**

All the interviewees said that their 'choice' of goods was limited by what their suppliers stocked.

*'There isn't much choice – I have to choose from what's available to me.'*

Café owner

*'If the supplier decides to send a different brand of beans, because they got them cheaper, I can't do anything about it.'*

Café owner

The big delivered wholesalers have detailed printed and online catalogues, while the smaller suppliers provide weekly price lists. The café owners chose from the catalogue or the list – they might, for example, order a 48-piece box of frozen, deep-fried, Southern-style chicken pieces and a pack of 5kg pouches of plain pizza sauce from the delivered wholesaler, and half a box of tomatoes, 5 sliced loaves and a 1kg-tray of sandwich mix from one of their smaller suppliers. But the café owners had no control over where the specified goods came from. In other words, much of what the café owners sell is chosen from a selection that has been predetermined higher up the chain (with the proviso that it can be rejected on grounds of poor quality). If the supplier had got a cheap deal on eggs or burgers, then that would be what the outlet received and sold.

*'What we get will just be whatever is best value for the suppliers at that time. And I don't know how many links there were in the chain before it got to them.'*

Sandwich shop owner

### **They felt caught between what the supplier brings and what the customer wants**

On the other side of the equation, most of the interviewees said there were certain things they just had to stock in order to retain custom: branded confectionery was one example, and the sandwich shops said that chicken fillings (the biggest sellers) were indispensable. Caught between cost constraints, customers' demands for certain foods, and their inability to specify beyond the suppliers' inventories, the interviewees did not feel they had much control over the range or provenance of the food they sold.

### **An extreme example of supplier 'lock-in'**

One takeaway was supplied by one man with a van, who operated alone and was contactable only via his mobile phone. He supplied everything the takeaway needed, and delivered it once a week. The owners of the takeaway used him because they knew him and because he was prepared to give them credit when they didn't have cash. Only if the supplier ran out of something would the takeaway owners use one of the big ethnic supermarkets or a street market near where they live. Because they were locked into this arrangement with a supplier, these takeaway owners exercised very little control over the quality of the food they sold.

### **The interviewees felt the most pressing issues were immediate, commercial ones**

The interviewees were worried about rising bills (especially for food supplies, gas, and electricity), the challenge of maintaining quality at the right price, slim margins, the difficulties of retaining staff, the strain of keeping the shop clean, and competition from a large number of start-up food businesses. No one mentioned any of the wider issues affecting the food chain, including the sustainability issues under investigation here. 'I am trying to cook nice food, at a reasonable price, and trying to have staff who can cook and want to stay, and also to meet the hygiene standards', was how one takeaway owner summed up his priorities.

### **The term sustainability was not very familiar**

When asked what they understood by 'sustainability', the organic café owner defined it eloquently ('Whatever resources we use and every decision we make, we need to consider future generations, and whether they would benefit, or at least not be damaged and having to pay for our mistakes') and a sandwich shop owner provided an unconventional but viable definition: 'I'm a born again Christian. I wouldn't do to others what I wouldn't want done to me'. But most had a hazy idea of what it meant ('Is it about making better use of the land, and better flavours?') and some had never heard the term.

*'I am familiar with these issues, but not with this term [sustainability]. Generally we are too busy getting on with daily life – business issues, family issues, traffic wardens – to think about these things. Of course they are important. When I see a film such as 2012, I might think about them for a few days. My children talk about these things a lot. But then the pressures of daily life take over again. I can only focus on what's going on in my restaurant.'*

Takeaway owner

### **The interviewees felt helpless**

When provided with a working definition – that it involved feeding everyone fairly and healthily, avoided environmental damage, and provided a decent livelihood for workers in the food chain – some interviewees said that these issues were irrelevant to their business. But a more common feeling was that as small business owners they couldn't do much about these things, even when they felt they were important. 'As a small businessman, you can't do much,' and 'For the quantities we buy and sell, there's not an awful lot we can do' were representative comments. The scale of the necessary changes seemed overwhelming – especially since there was so little time to think about anything beyond the pressing necessities of the business. There was also a feeling that the need to keep prices low was at odds with the goals of sustainability.

There was more recognition for the strands of sustainability concerning health and the environment (even though these were felt to be a long way from being achieved) than about fair work. This was perceived to be much harder to realise in the food system.

*'We are a commercial enterprise, and these [sustainability] considerations just wouldn't come into our vision – to be selfish, we are about making money. Obviously the environment is important, because if it is destroyed the food supply will be endangered. But as a small place, these issues just don't feature in our planning, though I realise that if everyone worried about it, things might change. I think of this as being very government-led – it's out of our control, we can't have any effect on what goes on.'*

Sandwich shop owner

*'I'm very much against people chopping down the Amazon, I have strong views about people polluting the world or even dropping litter. But what can I do? I know it helps if individuals do things, in small ways, but it takes the government to act, from the top.'*

Café owner

### **Energy use and waste disposal**

Because food businesses use relatively large amounts of energy (for cooking, air conditioning, and chilling and freezing foods), and also produce a lot of waste in the form of compostable food and recyclable packaging, these are seen as areas where caterers can make simple but constructive changes to improve their sustainability. Reducing energy use, in particular, is seen by larger businesses in the sector as a 'win-win', enabling them to reduce their bills and carbon footprint at the same time. Various agencies provide advice to catering companies on how to achieve these changes, including some that offer free help to small businesses. However, none of the cafés interviewed had used any of these bodies, even though almost all of them mentioned rising energy costs as a source of anxiety.

Their approach to waste varied. In the first place, some businesses saw the prompt disposal of leftover food as an emblem of the business's good hygienic practices. 'We never re-heat the jacket potatoes', said a sandwich shop owner. 'If they're unsold, we chuck them out'. Other cafés prided themselves on recycling one day's leftovers into the next day's menus. More importantly, though, only a minority of the businesses separated their waste into recyclable and non-recyclable material and were willing to pay extra to have the recyclables collected separately (food businesses generally have to pay to have their waste collected). 'It all goes in the bin, I'm afraid', was a typical response.

*'In Vietnam, people would pay you for the glass bottles you wanted to get rid of. We have to pay to have recycling collected, whereas the people who live in the flats upstairs get it collected for free. Sometimes I take the bottles to the recycling centre myself, but sometimes we just dump the stuff in the bin.'*

Takeaway owner

### **'Greener' at home than at work**

Some interviewees said that they did things at home – such as buying organic food, using farm shops, and recycling rubbish – that they didn't do at work because there wasn't time or it was too expensive or seen to be irrelevant to the business.

### **On the work and the pay**

The interviewees worked long and sometimes unsocial hours. For example, one worked from 11pm till 11am five days a week and a takeaway owner recalled that for the first 10 years he was in business he worked from 10am to 12.30am, seven days a week. Most seemed to accept this as part of the job, and while some regretted the constant absence in the evenings that meant they saw little of their young children, others felt that the unusual shift patterns allowed them to fit work around childcare or other aspects of their lives – the flexibility compensated to some extent for the low pay.

Most interviewees knew and commented on the fact that work in the food sector is badly paid ('We're not getting rich', as one said). All said they worried about the rising cost of food and energy (their main outgoings), and their slight margins. The owner of one takeaway said that after paying the bills there were many weeks in the year when they made no profit.

Interviewees were not asked directly how much they earned or paid their staff, but most (unsurprisingly) said they paid at least the national minimum wage (£5.80 an hour at the time) and some said they exceeded it. For example, a café owner paid his chef £30,000 a year, and a sandwich shop owner said that senior staff were on quite a high rate, which was causing cash flow problems, but she was anxious to keep them. A café manager said: 'I can't pay people enough – it's not achievable, the way the system works.' This woman also said that if she herself had a mortgage to pay, she would not be able to afford to do her job – she would have to find something that paid better. The free meals that were provided at all the businesses were seen as a perk that saved staff money.

Only one takeaway operator admitted paying less than the national minimum – her assistant chef was earning £40 for a 10-hour shift, or £4 an hour, and her drivers £5 an hour, plus a 70p tip per order. Some café owners were reluctant to discuss how many staff they employed, or what hours they worked or how much they were paid – perhaps supporting other evidence that the sector is heavily reliant on irregular and in some cases exploited labour.

*'We obviously don't have to pay our staff as much as a European restaurant would, because most of the staff in the kitchen can only work for us because they don't speak English.'*

Takeaway owner

Although the interviewees were resigned to long hours and relatively low pay, it wouldn't be accurate to report that there was a strong sense of grievance or injustice about the pay and conditions of their work (although it should also be remembered that the interviewees were owners and managers, not employees). Most were strongly motivated by the fact that they ran their own businesses – 'working for themselves' was seen as an advantage of the job. 'We work hard. As a family, we work for ourselves. I deliver, cook, serve, everything', one takeaway owner said.

*'This is a good living, yes. I've been here 28 years. I've never been unemployed. I've never been in a queue saying I've lost my job. Even when I'm sick I go to work.'*

Café owner

There was also a recognition that good staff were important to the business ('service is important to the customers, so it pays to look after the staff', as a café owner summed up), and beyond this, a sense of responsibility for workers whose livelihoods were being supported.

*'Sometimes I get a good wage, and sometimes not. It depends on the outgoings. The shop hasn't been very busy the past few weeks, with Christmas and then the snow, so I haven't had any money. I'm lucky [her partner earns enough to keep them both going]. The girls always get paid, though – I would take it out of my savings to pay the staff. And I've avoided laying one off over these past weeks. I know they rely on that bit of money, they've got families. And my sister [an employee], she's got a mortgage.'*

Sandwich shop owner

But this resignation, or pride, was tempered by a sense of the low status of the job. This was reflected in the strong feeling of powerlessness interviewees felt, for example, in relation to their suppliers, or when confronted by the need for change. But they also expressed it directly. A sandwich shop owner said: 'Sometimes you feel customers look down on you because you're just a sandwich maker.' A takeaway owner, expressing a view widely reflected in statistics showing that the children of immigrant restaurant owners leave the family business, said: 'We came late [to this country], running a restaurant was something to do, you work for yourself. But as parents, you hope your children can do better.'

## Box 1. These changes were suggested to help small cafés and takeaways become more sustainable

- Use locally sourced foods as far as possible
- Vary the menu to use seasonal ingredients
- Choose foods from more sustainable production systems, such as Fairtrade or organic
- Reduce the amount of salt and fat in the food
- Provide customers with nutritional information (e.g. salt and fat content) on menus
- Use recyclable materials for takeaway packaging
- Always pay a living wage and provide good working conditions
- Tell customers (via menus, window signs, etc.) what you are doing about these issues.

These changes are not meant to represent a definitive or comprehensive agenda for sustainable catering. They are intended merely to present some practicable options that small cafés and takeaways could implement to help them meet widely accepted sustainability targets. They are adapted from criteria for sustainable catering developed by, among others, the Centre for Environmental Studies in the Hospitality Industry at Oxford Brookes University and Sustain: the alliance for better food and farming.

### A menu for sustainable change

We asked interviewees how they would feel about making some changes to the way they ran their businesses, to help them become more sustainable (see Box 1). Their responses to some of these suggestions have already been discussed – for example, most of them said they already avoided using excessive amounts of salt and fat in their food, a few of them already used recyclable packaging for takeaway goods (or would do so if the cost was the same), and most felt they paid as fair a wage as they could and provided a happy working environment, though a few were reluctant to discuss this.

For most of the other suggestions, a fair summary of the interviewees' reactions would be to say that while they thought some of the changes were worthwhile in theory, they were resoundingly inappropriate to the type of businesses they were running, in terms of both cost and customer expectations. They would entail expense that could not be passed on to customers, and there would be no promotional value in drawing customers' attention, via signs and so on, to any steps towards greater sustainability.

On local sourcing, several interviewees readily fantasised about an idyllic supply chain, in which they could grow their own vegetables, use local bakers, buy eggs and milk from pleasant, nearby farms and so on – but they felt that operating as they did in the middle of a city meant 'local' sourcing just wasn't possible. This was reinforced by the constraints of the supply system, which meant they knew very little about where the foods they bought came from, and in any case gave them no choice but to buy what their suppliers had already chosen.

*'If you said you can get milk from those cows in a field over there, or eggs from the little old lady over the way, and it was £1 extra, I would probably do it. But the option isn't there. And cost would be a problem – people would have to get used to paying more.'*

Café owner

Some of the interviewees said they already varied their menus to reflect seasonal availability, not least because vegetables and fruit, in particular, tend to be cheapest when in season. A few couldn't see the point or necessity: 'Why is it important?' asked a takeaway owner. 'I believe the things I am using grow all year round in greenhouses'. Others felt hemmed in by customers' expectations that certain items (such as avocados, 'an exotic in my father's day', as one interviewee commented) would always be on the menu, and also that customers disliked change. For those with printed menus, variation for any reason was costly and impractical.

*'Changing the menu is a source of trouble, in my view. I never vary it. The trick is to have a number of things you can serve in various combinations. That way you avoid waste.'*

Café owner

There was little interest in using products from certified, sustainable sources, such as organic or Fairtrade. These were felt to be too expensive, and the fact that customers were said never to ask for them was equally decisive.

*'Selling that stuff wouldn't work here. People don't care about those things. They would be too expensive.'*

Café owner

Opinion was more varied on the subject of providing customers with nutritional information (such as the number of calories or the amount of salt or saturated fat) for the foods on sale. Several had heard about a current FSA initiative to encourage food businesses to provide calorie information at the point of choice. Although some were sceptical on the grounds of lack of customer interest ('They simply aren't interested in this information. What they want is simple – tasty and fast food' said a café manager), others saw change of this nature as inevitable. Implementing it, though, would be difficult, and would be likely to increase costs and involve extra work for staff. 'We would have to get stickers made, and put one on every sandwich as we made it up,' said a sandwich shop owner. Practical problems included the difficulty of calculating the nutritional value of the foods in the first place, and the complication added by variations in the menu, which would mean the information would have to be recalculated on a more or less daily basis. Few stuck to written recipes – the chef might vary recipes from day to day, or different members of the staff might make them up slightly differently. Several foresaw that the plan would increase standardisation and limit creativity and the ability to recycle leftovers. Some pointed out that if information were to be included on the packaging of pre-packed foods, such as frozen chicken nuggets, they could pass this on to customers fairly easily, but it would be harder to provide it for, say, chilli con carne made from scratch on the premises.

*'It would be very difficult for us to provide nutritional information, because we adapt recipes to use leftovers and change the menu daily. If we had to stick to really tight recipes it would increase waste and limit inventiveness.'*

Sandwich shop owner

*'Bollocks. We've been eating this stuff for years. Leave it be. Ask me what's in a cheese and tomato sandwich? It's got fucking cheese and tomato. Then again, the chef doesn't cook from recipes, what's in the food today might not be in it tomorrow.'*

Café owner

One striking aspect of the interviewees' responses to the suggestions, though, was that many of them felt they would be able to make some of the changes, on certain conditions. First, they would need help and guidance, because shortage of time and staff meant they were already stretched to the limit of their knowledge and capacity. Secondly, they would probably make the changes only if they 'had to', meaning there would have to be a new law or regulation, with which they (and all their competitors) would have to comply. Since everyone would then be facing the same requirements (unless they broke the law, which interviewees said some businesses already did), individual enterprises would not lose competitive edge. Thirdly, and most intractably, anything that was perceived to be likely to increase costs was seen as a problem, because the interviewees were very sceptical about whether these costs could be passed on to customers who, after all, would not have any more money to spend even if they had the desire to do so. The tightness of the budgets and narrowness of the margins meant that even a small increase in non-recoverable costs could threaten the viability of the businesses.

## Casual food in context

The type of food and way of eating summed up in this report as 'casual' occupy a relatively unscrutinised corner of the food system, even though their scale and impacts are extensive. This section looks in more depth at some of the issues and implications.



### What is catering?

Casual or quick-service food is part of the catering sector, so it is probably useful to start by defining what that is. Most diagrams of the food system show food producers (farmers, fishermen) and manufacturers (the people who turn cereals into bread or chicken into nuggets) at one end and consumers at the other. In between, broadly speaking, there are two routes by which food can reach stomachs: via retail or via catering. Both involve gathering food from producers and manufacturers and distributing it to customers. The difference lies in the level of 'service' added to food by the caterers. The retailers in principle just sell you the food, whereas the caterers cook it for you, serve it at your table, or wrap it up ready for you to take away.<sup>41</sup> Although this distinction is blurring, as more and more retail outlets sell catering-style food, the catering industry is still often described as the 'food service' sector.

In value terms, the UK food service sector is almost equal to the retail sector: we spend about £90 billion a year on food and drink at retailers, and £82 billion on catering services.<sup>42</sup> If you take alcoholic drinks away, however, it's estimated that about a third of what we spend on food and drink goes to the catering sector, and two-thirds to retail. Since catered food is more expensive (we're paying for all that 'service') the quantity of food that goes through the retail channel is also much greater. But catering outlets (of which there are an estimated 263,000) outnumber food shops, and catering employs more people (1.4 million) than any other sector of the food industry.<sup>43</sup>

The sector includes a wide spectrum of enterprises. Some, like the small cafés we interviewed, or fine restaurants, or the big chains of pubs or fast food outlets, provide food directly to customers. Others, a step further back from public view, provide the cafés and restaurants with the food they sell, or even provide a full catering service to private businesses or public institutions that need to feed their customers or workers, but whose main business isn't feeding people. Some of the catering companies involved are huge, and although they have probably fed you, you may not know their names.

Mitchell and Butler (owner of the All Bar One and Brown's brands) and the Whitbread Group, are examples of companies that own chains of pubs and restaurants. Each had a turnover of more than £1 billion in 2008.<sup>44</sup> More familiar giants include the fast food chains, such as McDonald's (also with a £1 billion-plus UK turnover), Subway, and KFC.

Compass is one of the companies that provides catering services to other businesses. In fact it is the largest 'contract caterer' in the UK, employing 52,000 people at 7,000 sites, with a turnover of £1.9 billion in 2008. (It also operates in 55 other countries around the world, with global revenues of £13.4 billion.) Clients include state and private schools (where it operates under the brands Scolarest and Chartwells), care homes, prisons, the RAF, and several government departments.<sup>45</sup> Compass owns the brands Upper Crust, Harry Ramsden's, Caffé Ritazza, and Amigo, and holds many franchises for branches of Burger King, Krispy Kreme, and Marks and Spencer Simply Food, which explains why you see these outlets clustered together in the concourses of stations, airports, and shopping malls.<sup>46</sup> As the website says, 'Millions of people around the world rely on us every day to provide their breakfasts, lunches, and dinners and make their lattes and cappuccinos.'<sup>47</sup>

Some of these companies have imitated the big retailers in forging direct links with farmers and manufacturers. Most, though, both large and small, are supplied by wholesalers, which themselves range from small, specialist distributors up to huge, national 'delivered wholesalers', which gather food in regional distribution centres and deliver it to food service outlets everywhere. Some of these firms, too, are leviathans of the food supply system. The biggest, 3663 (whose name spells 'food' on your phone keypad), has 1.8 million square feet of storage space at 33 warehouses around the country, and distributes food in a fleet of 1,100 vehicles. It is owned by a (mainly South African) private equity company, Bidvest, and it supplies food to Pizza Hut, Burger King, KFC, Prêt à Manger, Arsenal Football Club, HM prisons, and HM the Queen (from whom it has a Royal warrant).<sup>48</sup> An article in *The Independent* in 2007 commented that Three Double Six Three 'influences eating habits as much as Gordon, Nigella, Jamie and Delia combined'.<sup>49</sup> (It was also the first UK wholesaler to meet the international environmental management standard ISO14001 across all its transport and storage operations, and appears on the *Sunday Times* list of the '20 best big companies to work for'.)<sup>50</sup>

Then there are the cash and carries, another type of wholesaler, which also provide 'frozen, chilled and ambient' food (i.e. everything) to caterers, but allow customers to collect it themselves. The biggest of these, Booker (with 2009 sales of £3.2 billion, covering both delivered and cash and carry), was used by many of the small-scale businesses interviewed for this report.

The size of the large restaurant and pub chains, contract caterers, and wholesalers gives them power to dictate specifications and drive down prices in the supply chain that rivals that of the big retailers.<sup>51</sup> Their global sourcing policies, and the

distribution systems that pool goods into a few, large depots then redistribute them to customers nationwide (also similar to the retail chains' systems), have been accused of excessive road and fuel use and of 'killing regionalism' in British food.<sup>52</sup> Rather than recycling money through local economies, they tend to siphon it away. By standardising the food supplied to catering outlets, they also undermine the apparent diversity of the eating out sector.

### **Why casual eating is bad for our health**

Few Britons today have too little to eat, but our diet is not ideal. On average, we take in more calories than we need to fuel our sedentary lifestyles, and our diets contain too much salt, sugar, and saturated fat and not enough fruit, vegetables, and wholegrains. This type of diet increases the risk of suffering from a range of health problems, including heart disease, cancer, high blood pressure, diabetes, low birth weight, learning difficulties, reproductive problems, tooth decay, mental illness and, most visibly, obesity, now affecting 25 per cent of adults and 10 per cent of children.<sup>53,54,55</sup> It is estimated that there are 70,000 avoidable deaths every year because diets do not match nutritional guidelines.<sup>56</sup>

Moreover, all of these diet-related conditions affect poorer people more than richer people, contributing to the outcome that in England people in the poorest neighbourhoods can expect to live seven years less than people in the richest neighbourhoods, with a 17-year difference in their expectation of disability-free years.<sup>57</sup> The poor spend less overall (though a higher proportion of their income) on food, have less access to shops selling a range of fresh foods that they can afford, and have diets that are less adequate, in terms of important nutrients, than the better off.<sup>58,59</sup>

These are the drawbacks of our diet overall. Our growing habit of casual eating can be seen to exacerbate the problems. The ubiquity of casual food, its cheapness, and its generally poor nutritional value can all be seen to contribute to a way of eating that is both unhealthy, obesogenic, and inequitable.

We usually require casual food to be cheap, and cheap food tends to contain a lot of calories. To put it formally, there is 'an inverse relationship between the energy density of food [calories per gram] and energy cost'.<sup>60</sup> The cheapest calories come in the form of sweeteners and fat, so cheap foods contain a high proportion of these. For example, 100 calories in the shape of a banana cost 10p, but embodied in a custard cream biscuit cost just 2p. Premium pork sausages (11 per cent fat) provide 100 calories for 11p, bulk buy frozen pork sausages (29 per cent fat) for 4p; lean mince (12 per cent fat) for 38p, regular mince (20 per cent fat) for 18p and value mince (28 per cent fat) for 8p, and so on.<sup>61</sup> This means that if you are hungry and you don't want to spend much money, so called 'junk' foods are a sound economic choice. It also means that if you are running a café on slim margins, it makes sense to buy low-cost food, even though it is likely to be less than optimally nutritious.

Humans are not well adapted to a diet that is either this easy to obtain, physically and financially, or this high in calories. Our bodies' weight regulatory systems evolved under conditions of high physical activity, including the exertion involved in obtaining food. Gradually, this has become easier – the energy cost of feeding ourselves has fallen; and the ready availability of food has freed us up to pursue sedentary jobs and hobbies.<sup>62</sup> At the same time, there is evidence that the very composition of a lot of fast and convenience food bamboozles the 'satiety' mechanism that helps us to control our appetites. Some studies have shown that human beings are bad at recognising foods that are 'energy dense' (contain a lot of calories relative to quantity) and regulating consumption accordingly. This means that if we are eating something very calorific, like a chip butty, we don't instinctively eat less of it than if we are eating a bowl of steamed vegetables. This so-called 'passive over-consumption' has been identified as a possible link between fast food and obesity, because fast food tends to be very energy dense. An analysis of some popular menu items from Burger King, McDonald's, Jack-in-the-Box, and KFC found that that they had an energy density 65 per cent higher than the average British diet, and more than twice that of a recommended healthy diet.<sup>63</sup>

It is also undeniably true that human beings like sweet, rich foods, and casual food can be highly palatable – all those Quarter Pounders, shish kebabs, and coronation chicken sandwiches aren't disappearing down our throats because they taste bad. This is true even though their tastiness is partly due to the added flavourings, thickeners, and texturisers that provide savour and 'mouth feel'. Eric Schlosser, author of *Fast Food Nation*, commented that 'much of the taste and aroma of American fast food... is now manufactured at a series of large chemical plants off the New Jersey Turnpike.'<sup>64</sup>

It was partly books like Schlosser's that alerted the public (and public health officials) to the horrors that could be hidden in fast food and junk food. Many surveys have now found the food from takeaways, fast food outlets, pizzerias, and sandwich shops to be generally high in precisely the nutrients we are supposed to be avoiding – salt, saturated fat, sugar, and overall calories. For example, *Which* magazine analysed a Chinese meal that contained the equivalent of 19 teaspoons of sugar, and found that half a cheese-and-tomato pizza contained more saturated fat than a woman should consume in a day.<sup>65</sup> When trading standards officers in Liverpool analysed a range of meals from six takeaways in the city, they found that the average amount of fat, salt, and overall calories in these meals often exceeded the total daily recommended allowance (RDA). One prawn chow mein contained 363 per cent of the RDA for salt, and the worst seafood pizza contained 147 per cent of the fat, 195 per cent of the salt and 126 per cent of the calories an adult man should consume in a day.<sup>66</sup>

Similar results were found when Antrim Borough Council sampled fish-and-chip meals from 11 local takeaways. The samples were found to be high in saturated fat and salt, some exceeding the adult RDA, and some were also high in trans fat (considered to be especially bad for health). (In this survey, 46 per cent of the customers who completed feedback forms ate takeaway meals 2–3 times a week.)<sup>67</sup> CASH, the organisation that campaigns against excessive salt use, found 41 per cent of the takeaway sandwiches it analysed contained more salt than a Big Mac, and one contained as much salt as seven bags of crisps.<sup>68</sup> On a different tack, the FSA and local authorities found takeaways and restaurants serving 'chicken' that had been imported frozen, thawed, treated with salts, sugars, and flavourings, then repackaged and refrozen, with the final (mislabelled) product containing only 54% chicken.<sup>69</sup>

And neighbourhood cafes don't necessarily compare favourably with the big chains when it comes to serving up (relatively) healthier food. A CASH survey of takeaway outlets near schools in 16 London boroughs not only found that the food often contained far more than an adult's daily recommended intake of salt and saturated fat, but also that the meals from small, independent outlets scored worse than similar meals from the big chains. For example, a chicken crispy bacon panini from an independent café contained more than twice as much salt as a similar-sounding sandwich from Subway (and five and a half times as much salt as a similar sandwich provided as part of a local school's meal).<sup>70</sup>

In any case, what has to happen to food to enable it to be produced in multiple identical versions, to withstand possibly lengthy storage and rough handling during transportation, to hold its shape, texture, appearance, aroma, and flavour during freezing, vacuum packing, and re-heating, and be hygienically passed over to the customer by a worker who may have had only the most minimal training in food handling? Again, these are not procedures unique to the casual food chain; but the range of outlets, facilities, and levels of skill involved mean this kind of food encompasses every technological trick in the book. One way to answer the question is to start reading the ingredients lists, where these are available. Not all companies provide them – another facet of the caterers' lack of transparency – but McDonald's, to its credit, does. So we can work out that a Big Mac (bun, beef patty, sauce, cheese slice, gherkin, onion, lettuce: seven components) contains more than 56 ingredients, 14 in the bun (including several polysyllabic glycerides and esters in the 'emulsifiers' category), 19 in the sauce, 8 in the pickle, and 12 in the cheese slice, which is only 55 per cent cheese. The beef patty, onion, and lettuce are all '100% pure', and the salt and pepper added to the burger haven't been included.<sup>71</sup>

A final point concerns the accessibility of casual food, especially fast food, and its possible role in health inequalities (patterns of variation in health between social groups). It has long been argued that poor people have restricted access to nutritious foods, partly because they can't afford them, but also because the areas where they live tend not to attract the kind of retailers and catering outlets that supply healthier foods (leading to the idea of 'food deserts'). In fact, poorer areas may have a disproportionate number of shops and outlets selling cheaper, less nutritious foods (so-called 'food swamps'). Numerous academic studies, especially in the USA and Australia, have looked for a link between the location or concentration of convenience or fast food outlets and the prevalence of, for example, obesity, with mixed results.<sup>72 73 74</sup> Common sense, however, suggests that people looking to set up cafés selling expensive (and therefore possibly healthier) food would do so in areas where they could expect to find a clientele who could afford it.

The prevalence of childhood obesity has focused attention on young people's access to high-calorie foods. The CASH study mentioned above found that the food available from takeaways near London schools had a very unhealthy profile. Another UK study tracked what secondary school pupils actually bought at the various outlets located near their schools (a zone the study refers to as the 'school fringe'). The two schools studied were large, mixed comprehensives, one in a suburb, and one in a city. Almost all the pupils bought food at the outlets on the school fringe, many doing so every day, and the food provided calories equivalent to almost a quarter of the children's daily requirement. Overall, the main problem was sugar, comprising almost a third more of the calorie intake than recommended. However, the study also found that takeaway outlets on the school fringe offered child-sized portions at special prices, and even employed extra staff at busy times. The fat in these meals accounted for 45 per cent of calories, compared with a dietary recommendation of 35 per cent.<sup>75</sup> Concern about fast food outlets clustering around schools has led three London boroughs (Waltham Forest, Tower Hamlets, and Barking and Dagenham) to try to use planning controls to restrict the number of new takeaways opening near secondary schools.<sup>76</sup>

To summarise, although not all casual food is cheap and/or unhealthy, cheap foods loaded with sugar, salt and fat dominate the casual menu.

### **Why casual eating is bad for workers**

If cheap food is one prerequisite for a casual diet, the other is cheap labour. Food workers are poorly paid relative to people who work in other sectors, and the often part-time and supposedly unskilled work that takes place in the casual sector is no exception.

In fact our abundant supply of ready-made food depends on two sorts of cheap work. One is the kind that occurs largely out of sight of consumers, and is a major factor in keeping all food prices in the UK as low as they are. This is the cheap labour that allows, for example, Brazilian cattle ranchers, Thai poultry farmers, Vietnamese prawn fishermen, and Kenyan vegetable growers to produce their goods more cheaply than anyone else can, even though it has to be shipped half way around the world to market. Apart from the fact that these workers may earn subsistence wages, their labour is also cheap because they lack the levels of worker protection (such as from excessive working hours or unsafe use of agrichemicals, or in the form of paid sick leave and holidays) that are legal requirements in the EU. And even within the EU, including in the UK, for farmers and processors to be able to compete with cheap imports, or to meet the prices specified by their customers in the supply chain, they have to depend on a workforce that now routinely comprises large numbers of contract or agency workers, many of them migrants, who are prepared to work 'flexibly' (which often means not knowing when or for how long they will be working), who may be expected to work for illegally low wages, and who are sometimes subjected to abuse.<sup>77,78,79</sup>

The second kind of cheap labour our casual eating habit depends on is more visible and closer to home, done by the people who work in the kitchens and behind the counters in the outlets that sell it. Setting up a café or takeaway, or



working in one, is often seen as an entry into employment or self-employment. It involves skills that can be transferred from the home, and provides food and often accommodation for the owner and his or her family. It enables new migrants to bypass the cultural barriers (such as racism, or lack of language skills) that may restrict other employment opportunities or obstruct career paths. Successive waves of migrants have followed this route in the UK, with the result that we now have a diverse casual food sector, with many traditional British cafés, as well as fish-and-chip shops and ethnic takeaways (including a majority of our interviewees), run by families originating outside Britain.

A side-effect of this process, though, is that serving café or takeaway food can be seen, by the workers and the customers, as unimportant, unskilled, and low-status work. Some interviewees seemed embarrassed by their trade, and migrant café owners said they would not want their children to follow them into the business, confirming a familiar pattern, in which first-generation migrants work in catering, but their better-educated children move into other occupations.

Although it is illegal knowingly to employ someone who does not have a legal right to work here, the casual food sector is a common source of employment for 'irregular' workers, whose situation makes it necessary for them to work 'invisibly' and who are consequently open to exploitation by their employers – and indirectly by the customers who use the cafés. Some of these workers are family members who help out during busy times but are not paid or insured; others are migrants working outside the restrictions of their visas, or who have smuggled themselves (or paid other people to smuggle them) into the country. Separate investigations of the Chinese and Bangladeshi catering sectors have revealed similar patterns. In many cases, businesses were said to be viable only because of the availability of irregular workers who could be cheaply employed; the employers said they would prefer not to use this system but the economics of their business left them with no alternative.<sup>80,81,82</sup>

It is estimated that there are 11,600 Chinese takeaways in the UK, spread all over the country. The great majority are very small, employing fewer than five workers. One of the very few surveys to have investigated this sector found heavy reliance on staff overtime and the help of family members to get through busy periods. Outside London, a majority of the takeaways also tied food and accommodation to employment, increasing employees' dependence on their employer. The research identified working in takeaways, not necessarily with any starting experience of food work, as an established route to better-paid restaurant work. The researchers concluded that perhaps 25 per cent of Chinese catering outlets (restaurants and takeaways) could close if either the border controls on incoming migrants or the sanctions imposed on employers found to be employing illegal workers were to be more harshly enforced. They warned that, given the high proportion of small, family enterprises that would be affected, this could have a very destabilising effect on the British Chinese community. The law, as it exists, is said to criminalise both the employers and the employees, forcing them to lead lives of fear and deception, while providing a service that many see as a cornerstone of British life.<sup>83,84</sup>

Evidence from another source illustrates the harshness of some work in the Chinese catering sector, and the extensive use of irregular labour. Hsiao-Hung Pai, a British-Chinese reporter, went undercover as an 'undocumented' worker in restaurants in London's Chinatown in 2007. In her book, *Chinese Whispers*, she describes how, among the waiters, she encountered exhausted workers earning a 'basic rate' of just £5 a day for an 11-hour shift, six days a week, with a variable amount added from tips, no paid holiday, no sick pay and just two (unpaid) non-working days in the year, over Christmas. (The Mayor of London's recommended living wage at the time was £7.20 an hour.) Some had borrowed as much as £20,000 to pay smugglers in order to come to the UK, debts which would take years to pay off. But, as she discovered, waiters, as the 'front face' of the restaurants, tended to have legal status, which meant they could have bank accounts, use their real names, visit a GP. Behind them, chopping vegetables or washing dishes in the airless kitchens, standing with placards in the street as 'greeters' or unloading vans round the back, were the 'concealed foundation' of the Chinese catering trade, the thousands of undocumented workers. She joined them as a dim sum trolley pusher, using a false name and with no questions asked about her legal status (though forged and photocopied work permits were easily obtainable). She was paid £3.20 an hour, given no training, asked for a £50 deposit, not allowed to carry her asthma inhaler while working, liable to be dismissed without notice and expected to eat her free daily meal from a communal trough of meat and vegetables.<sup>85</sup>

Academic researchers investigating predominantly Bangladeshi catering businesses in the West Midlands also found that a 'seemingly unstoppable' flow of labour migration combined with official policies that force much of it underground have led to a situation which 'effectively criminalises employers and workers for providing a positive economic and social contribution to the wider social good'.<sup>86</sup> Many of the businesses studied were unprofitable in conventional terms, and survived only by accepting uneconomic returns, cutting costs to the bone and employing 'ultra cheap' labour. The work was arduous, the hours long and unsocial, and pay was under £200 a week in 2006. The employment of at least some 'illegals', who were found to be cheap, hardworking, deferential, and compliant (for example, they were willing to submit to 'flexible' working practices such as being laid off without notice during slack periods or working unpaid overtime), was seen as essential to the businesses' survival.

But the picture is not just one of exploitative employers and enslaved staff. Research among legal and illegal Pakistani and Afghani immigrants to the UK found evidence of an 'ethnic economy', based on extensive social networks, which provided a supportive environment and route into work for arriving migrants, irrespective of their legal status, and a pool of labour for settled co-ethnic businesses. Food businesses, in particular (shops, factories or restaurant/takeaways) provided work for new migrants. Halim, for example, a 25-year-old migrant from Pakistan, who had the right to live but not to work in the UK, had done 14 or 15 seven-hour shifts in a kebab shop, putting meat on skewers, at around £15 a shift. He had now moved on to a steadier job, in a meat shop. This progression from the most menial types of work,

some 'not fit for humans' according to Halim, to jobs which offered regular pay and prospects of a rising income, again irrespective of legal status, was found to be a common pattern. An employer in a sandwich shop saw the advantages of keeping staff happy and staff turnover to a minimum, so he provided incentives in the form of pay increases, and free food for workers on the job and to take home. However, the sandwich shop owner was aware that he benefited from the illegal status of some of his employees: 'It adds to stability. Basically, the guy doesn't have a future so I'm not always having to keep on the lookout for a new guy to replace him when he moves on to something better (like a British guy would). It's not my fault he's in a predicament. But the fact that he is gives stability to the small businesses which don't have to retrain new staff.'<sup>87</sup>

Of course, not all casual food is provided by illegal or exploited workers. In the research for this report, though several café owners were cagey about the terms on which they employed their staff, others showed real concern for their well-being and valued their contribution to the business. But the generally low pay and often precarious nature of the work are endemic. And though this report focuses on small independent businesses, it should be noted that some of the big fast food chains have also been criticised for their low pay rates and high staff turnover (which means that many staff leave before they become eligible for staff benefits), for paying by the hour and forcing staff to 'clock off' during quiet periods to avoid paying them, and for resisting unionisation. Because a lot of café and fast food work is part-time and low paid, it attracts workers who are likely to be young, poorly educated, or otherwise looking for flexibility, and therefore are likely to be more acquiescent and less challenging than other workers. In the infamous McLibel trial, in which McDonald's attempted to sue two members of the public for distributing leaflets critical of its business practices, the judge found that McDonald's paid low wages and depressed wages for other workers in the industry.<sup>88</sup>

The conclusion can only be that casual food is often the product of casual work. Though it may be demanding and require practical, social and business skills, it is also likely to be undervalued, part-time, precarious, unstructured, and badly paid.

### **Food in chains**

Although the businesses interviewed for this report were all free-standing, 'unchained' cafés, they face increasing competition from fast food chains. The idea of chains of cafés is not new. The first may have been the chain of tea shops run by the Aerated Bread Company, dating from 1864, but better remembered are Lyons Tea Shops, of which the first opened in 1894 and the last only closed in 1981. But fast food chains as we would recognise them didn't arrive (from the USA, not surprisingly) until the 1950s, when the Wimpy brand was licensed for the UK by Lyons and the first Wimpy Bar opened in a Lyons Corner House in 1954. Since then chains have established themselves firmly as purveyors of burgers, pizza, chicken, and sandwiches. (The UK's two largest chains by number of outlets, Greggs and Subway, both sell sandwiches.) Fish and chips, kebabs, and ethnic takeaways have proved more resistant (the Harry Ramsden's fish-and-chip chain has just 35 outlets, for example),<sup>89</sup> though chains selling Asian food are emerging. Today, 54 per cent of quick-service food, by value, is sold by chains.

The 'system' restaurant, the pattern of many of the fast food chains, has had an enormous impact on the food we eat. As the name suggests, they work to a system: everything about them is carefully specified, from the ingredients, recipes, menus, and portion sizes to the kitchen equipment, cooking processes, and manner of presentation. Very little is left to the individual judgment of any of the people involved, which is how chain outlets manage to provide food that looks and tastes the same wherever you buy it. This level of standardisation, on this scale, puts enormous pressure on supply chains, which are required to deliver vast quantities of very tightly specified products, with unflinching consistency. The system also puts great pressure on staff, who are likewise required to comply with the companies' specifications. This kind of routinization of work and workers has been given the name of the fast food firm that perfected it: McDonaldisation.<sup>90</sup>

McDonald's is the world's best-known fast food chain, with 30,000 outlets in more than 100 countries, including more than 1,000 in the UK. But sometimes

the chains whose names we recognise are part of other, less familiar chains, such as Gondola Holdings, which owns both Pizza Express and Ask! pizzerias. And how many people have heard of Yum! Brands? Yum! owns (among others) KFC, Pizza Hut, Taco Bell, and Long John Silver, global leaders, respectively, in quick-service fried chicken, pizza, Mexican-style, and seafood. Yum!, based in Louisville, Kentucky, is the world leader in system restaurants with 37,000 outlets in 100 countries, including China, where it is developing a chain of fast food restaurants selling Chinese food. It is also the fastest-growing quick-service food company in India. Its mission statement is to be 'The defining global company that feeds the world'.<sup>91</sup>

Some fast food chains are run as single businesses with multiple branches – in other words, they are managed centrally. Others – including McDonald's, Burger King, Domino's, Favorite Fried Chicken, and Papa John's – are proud of the fact that many of their branches are franchises, with the implication that this dilutes the homogeneity of the brands, and makes the branches more 'local' and independent. This isn't very apparent in practice. What fast food franchising seems to do instead is to make franchisees as standardised as the products they sell and the systems used to make them.

According to the British Franchise Association, 'business format franchising' involves the granting of a licence by a brand-owner (the franchisor) to a franchisee, who is then allowed to trade under the franchisor's name and trained to use its products and processes, enabling a previously untrained person to run, say, a pizza delivery business. The business is owned and operated by the franchisee, but the franchisor controls the way products are marketed and sold, and also controls 'quality and standards'.<sup>92</sup> Since controlling quality and standards for a fast food chain means making sure the products are uniform across all outlets, franchisees have to conform to the detailed specifications of the 'system'.

Part of the quality control involves getting the right type of people as franchisees. The UK Franchise Directory, an online resource for franchise holders, provides guidance for aspiring McDonald's franchisees. They must be prepared to make a commitment of 20 years or so and undergo, at their own expense, nine months of training. They will need to be able to put up 25 per cent of the average £200,000 cost of a restaurant and pay a one-off franchise fee of £30,000. Once up and running, they will have to pay regular fees based on their sales and profits – a monthly rent of around 12 per cent of sales, a 'service fee' of 5 per cent for use of the McDonald's system, and a contribution to national marketing of around 4.5 per cent of sales.<sup>93,94</sup> At the end of this process, you would have a strong financial incentive to make your business work by sticking closely to the brand game plan. Catering companies also franchise from each other. The contract caterer Compass holds many franchises for Burger King, for example – chains within chains.

In the UK, the fast food chains buy large quantities of identical food and sell it in a small number of largely pre-determined menu combinations at thousands of outlets all over the country. This gives them a lot of control over what we eat. They

**Table 1. UK fast food and sandwich chains, by number of outlets<sup>95</sup>**

Chain	Number of outlets	Chain	Number of outlets
Greggs	1400	Domino's	550
Subway	1400	Pizza Express	370
McDonald's	1200	Nando's	220
KFC	750	Prêt à Manger	193
Pizza Hut	700	Wimpy	165
Burger King	650	EAT	100
		Upper Crust	60

also spend a lot on persuading us to buy it. Between them, McDonald's, Subway, Pizza Hut, and KFC, the chains dominating the UK fast food market in burgers, sandwiches, pizza, and chicken, spent £75 million on advertising in 2008.<sup>96</sup> They wield tremendous power, both over suppliers and over the independent cafés they compete with.

### Clone food

The chains aim to serve the same food in all branches – that's the point. But how come so many of the independent cafés and takeaways have such similar menus? How do they all make identical curly fries and banoffee pie, and why do so many sandwich shops sell 'minted lamb' filling? The answer reveals a subtler form of standardisation. The foods are the same because increasingly they come from a handful of suppliers, who sell almost identical products.

A common response by the café and takeaway owners interviewed for this report to questions about how they chose the food they bought, and how much they knew about where it came from, was that in effect they had relatively little say in the matter. They tended to buy some perishable foods from small, local suppliers and frozen, tinned, and other non-perishable items from one of the big 'delivered wholesalers' (Bookers, JJ's and Nila were the ones most often mentioned, but 3663 and Brake Brothers are the biggest). Given the small scale of their operations, they had little influence over suppliers, and generally had to choose from their catalogues or take whatever was in the van. The frozen steaks could be from Brazil in one delivery and Australia the next; the cooking oil from wherever the suppliers had managed to find a bargain consignment that week.

And although there are still café owners out there mixing up coronation chicken and making cakes to their own recipes, most casual food arrives on the delivery van ready-made and deep frozen. A bacon roll may begin its life as a fresh roll, some vac-packed bacon, and a real tomato, but the crispy fried chicken, string fries, jumbo sausage rolls, and slices of carrot cake, the veggie burgers, spare ribs, southern fried wedges, and cream gateaux, even the hamburger buns and the 18.5cm hoagie rolls, are all highly likely to have been stored in the deep freeze until shortly before you ordered them. Those cylindrical doners come deep-frozen, from 5kg to 45kg, skin on, skin off, Turkish Best Halal, Classic Beef – JJ's, the wholesaler that pioneered the distribution of halal goods to caterers, offers 27 versions. (How surprising this must have been to Mahmut Aygun, the inventor of the doner kebab, who died in 2009 in Berlin at the age of 87. He came up with the idea in the 1970s so that roast meat, previously eaten off a plate, could be wrapped up in pitta; presciently, he said, 'I thought how much easier it would be if [my customers] could take their food with them'.)<sup>97</sup> What all this means is that whether you grab your slice of brie and sunblush tomato quiche (24 x 50g frozen slices for £8.29, also from JJs) in Stornoway, Land's End, or at Gatwick airport, it may have come from the same manufacturer, via the same wholesaler, and be, in fact, the identical product. Casual food is becoming clone food.

The use of pre-prepared foods is now ubiquitous in the catering sector. The reasons are not hard to understand. Our interviewees explained that using pre-made, frozen items avoids waste, saves staff time and provides customers with the variety and the uniformity of quality that we are now conditioned to expect. Frozen meals that can be microwaved on demand mean it doesn't matter if 13 people order steak pie one day and only three people order it the next. They also reduce the chances of menu items running out. Interestingly, the word used most often by the café owners interviewed for this research to describe the food they sold was 'fresh'. This usually meant freshly prepared – that is, cooked or made when the customer ordered it, perhaps using previously frozen ingredients. But it also meant ensuring that the supplies they bought had a 'long date' – i.e., a use-by date distant from the date of purchase, so they could safely be used over a long period and still be 'fresh'.

Frozen foods also solve the problems of lack of time and skill – café owners need not fear that their fillings or toppings will be inferior to anyone else's, or their menu shorter. Brake Brothers, for example, offers more than 30 types of sandwich filling, including, of course, minted lamb. And they eliminate the need for trained chefs, who cost more than casual kitchen assistants. The Booker online catalogue includes Big Al's range of fully cooked, frozen beef burgers (£26.35 for 32 x 6oz).

The copy claims they have a flame-cooked taste and appearance, cook from frozen in seconds, eliminate waste because they can be cooked to order, and that there is 'no need for a professional chef'. In another catalogue, an advert for Great British Puddings explains that the savoury puddings can be microwaved from frozen, go from freezer to plate in six minutes and have a home-made appearance. The picture of the pudding in the advert includes the strapline 'pudding on a plate' in which the word 'pudding' has been crossed out and replaced with the word 'profit'.

All the catalogues carry different versions of the same items at different prices, just as retailers do, presumably reflecting different levels of quality. (And here again, it is easy to see how health and cost pull in opposite directions – one supplier offers a 12.5kg block of own-brand solid palm oil, a highly saturated cooking fat, for £12.99 at one end of the range, and a 15L box of non-hydrogenated vegetable oil for £21.99 at the other.) The catalogues carry very little information on the provenance of the foods, though more is sometimes available to customers who go to the trouble of requesting it.

The point here is that the increasing reliance on a standardised range of prepared foods from a small number of suppliers not only undermines the apparent diversity and individuality of the independent caterers, but also circumscribes their ability to respond to demands for change. Hence our interviewees' feeling of helplessness in the face of pressures to run their businesses more sustainably.<sup>98,99,100</sup>

### Food for the bin

Everything we eat contains not just its ingredients but also all the energy and resources used to grow the raw materials and transport the food from its source to our mouths, and it also is responsible for any by-products of those processes. In the UK, the food we throw away every year that could have been eaten is responsible for the equivalent of 20 million tonnes of carbon dioxide emissions – that's the same as the CO<sub>2</sub> emitted by a quarter of the cars on our roads.<sup>101</sup> It seems particularly wasteful, then, that so much of the food we eat very casually ends up in the bin. In fact, 2 per cent (by weight) of all the avoidable food waste thrown away by British consumers every year consists of chips: 80,000 tonnes of them.<sup>102</sup>

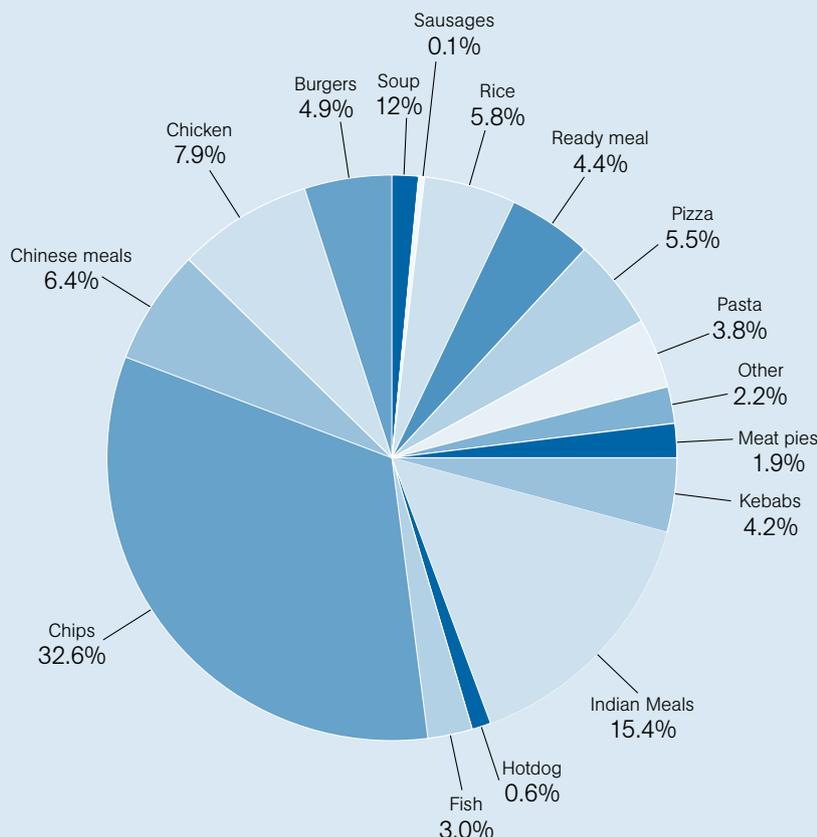
According to an analysis of the contents of the nation's bins conducted by WRAP, the government agency dedicated to waste reduction, we throw away 245,300 tonnes of convenience food every year, amounting to 6 per cent of all avoidable consumer food waste. The chips are accompanied by, among other things, 37,900 tonnes of Indian meals, 15,700 tonnes of Chinese meals, 13,400 tonnes of pizza, 12,100 tonnes of burgers, 10,700 tonnes of kebabs, and 7,300 tonnes of fish.<sup>103</sup>

And this is just what WRAP classifies as 'convenience food' (it doesn't seem to include sandwiches, for example) and the survey only counted what turned up in public and domestic bins – it excluded waste that arises within the catering sector itself. The survey also excludes packaging, which is one of the bugbears of casual eating, with all those aluminium trays, plastic forks, polystyrene cups, and extra napkins. Food litter, in the form of chip papers, branded cardboard boxes, triangular plastic sandwich containers, and carrier bags, sometimes still containing food, is now a commonplace public eyesore, and another unwelcome by-product of our habit of eating on the run. (Though some fast food outlets are so inflexible that they even provide you with the carry-out packaging when you eat in.)<sup>104</sup>

Tristram Stuart, a 'freegan' who has written a detailed book on wasted food (and has been eating it for years), describes opening bags of rubbish left outside a sushi outlet in the West End of London. (Sales of sushi, as an alternative to a lunchtime sandwich, increased by 30 per cent between 2005 and 2006.)<sup>105</sup>

He found kilos of cooked rice and meat, and many pots of chocolate mousse and tiramisu. But what shocked him most were the trays and trays of neatly prepared prawns, salmon, swordfish and tuna that were disposed of every day – species, which, as Stuart points out, are among the most unsustainable food sources in the world. The company explained that they were reluctant to allow any item to run out, because empty shelves discouraged customers and could mean lost sales. From their point of view, it made more economic sense to overstock than discard the surplus than to avoid waste by possibly under-ordering.<sup>106</sup>

**Figure 4. Proportion of avoidable convenience food waste by type.<sup>107</sup>**



Unfortunately, most of the food we waste (including the food waste generated by the cafés we interviewed) ends up in municipal rubbish dumps, where it gives off methane, an even more powerful greenhouse gas than carbon dioxide. This waste is avoidable, as almost all unused food could be composted and turned into a valuable agricultural fertiliser, and some of it could be sterilised and fed to pigs, as was the case until 2001, when the foot and mouth outbreak (attributed to inappropriate pig feeding) prompted the UK and EU authorities to ban the processing of food waste into pigswill.<sup>108,109</sup>

### Could casual food be more sustainable?

As noted elsewhere in this report, there is now widespread pressure for the food system to become more sustainable, and this pressure has, belatedly, started to filter through to the fast food and casual eating sector. Many of the big restaurant chains, contract caterers, and wholesalers have taken steps to reduce the negative impacts of their activities, for example by reducing fuel and energy use, redesigning packaging so that it uses less material or is biodegradable, or trying to improve the nutrient content of their dishes.

A wide range of initiatives, promoted and coordinated by government and civil society groups, exists to help this process along. To mention just a few, at the most formal end, there are now International Standards for environmental management (the ISO 14000 family), which help companies to identify, manage, and monitor the environmental impacts of their activities. The FSA is running a campaign to persuade large caterers to improve the nutritional content of the foods they supply. Sustain, the alliance that promotes more sustainable food and farming, has had a long-running campaign to encourage public institutions to use the £2 billion they spend every year on food services to demand more sustainable practices in the catering sector.<sup>110</sup> Sustain's Ethical Eats campaign helps sustainable suppliers and sustainable caterers to find each other,<sup>111</sup> and the organic action group the Soil Association runs an award scheme for caterers that meet its sustainability standards.<sup>112</sup> The recently formed Sustainable Restaurant Association (SRA) will provide accreditation to restaurants which meet some or all of more than

100 sustainability criteria, the idea being that if this information is displayed in restaurants, customers will be able to take ethics into account when they choose where to eat out.<sup>113</sup>

But all of this is much easier for prosperous, well-resourced enterprises than for small, marginal ones. In fact the SRA was set up because one of the founders, a successful restaurateur who wanted to operate more sustainably, found it so time-consuming to get to grips with the plethora of information and organisations involved that he felt a one-stop shop was needed. But the SRA charges an annual fee, and although it has made some of its criteria easy to meet (such as providing tap water), so that it will not seem exclusive, the scheme nevertheless depends on the idea that customers will see value in the accreditation, whereas none of the café owners we interviewed felt that this would be the case.

The organisations involved in trying to make catering more sustainable acknowledge the difficulties faced by small outlets with few staff and no spare time or cash. For example, the FSA recognises that its current campaign to persuade all catering businesses to provide calorie information is much easier for big firms than for small ones. The initiative has successfully recruited a range of big-name caterers, including Burger King, the Compass Group, and KFC, but has run into difficulties where it has been piloted in local, independent outlets.<sup>114,115</sup> Several of the café owners we interviewed had heard of the scheme, and some were receptive to the idea that customers might find calorie information helpful. But as they pointed out, the scheme unavoidably favours outlets which supply highly standardised menus and products; once the calorie count has been established the information can be printed on the menu and will not change. (In fact, many of the fast food chains already provide this information in outlets or on their websites.) For restaurants which vary their menus or do not use standard recipes – for example, recycling one day's leftovers into the next day's dishes – the information would have to be recalculated every day, a daunting, complicated, time-consuming, and expensive procedure.

Some practical steps are being taken to encourage cafés and takeaways to provide food that is at least healthier, even if it still falls short of some of the other goals of sustainability. For example, one simple but effective measure, used in Antrim and Gateshead, has been to replace the standard, 17-hole salt shaker supplied in fish-and-chip shops and other takeaways with a five-hole version. The customers seem to use less salt without noticing.<sup>116,117</sup> Other measures being advocated include the introduction of half-portions or healthier menu options, such as salads, the use of healthier frying oils, and the removal of MSG from recipes. The FSA is preparing a series of leaflets aimed specifically at different types of fast and casual food outlets, providing tips on how to make the food healthier, for example by specifying the ideal oil temperature for frying as this affects the amount of oils absorbed by the chips.<sup>118</sup>

This is helpful, but doesn't go far enough. Most of the programmes designed to promote sustainability focus either on the nutritional content of food or the environmental impacts of business activities – the sort of things that can be measured and standardised, so that comparisons can be made between products and companies, and over time. But many of the social aspects of sustainability defy this sort of quantification. How do you price the knowledge of a man who has been running a local café for 28 years, even if he never varies his menus? In any case, to the extent that well-resourced businesses can adapt to change more easily, the pressure for sustainability could in itself be helping an inherently unsustainable business model (the global fast food chain) to displace a potentially more sustainable one (the local, independent café).

Above all else, cost emerges as the dominant factor that determines whether the small businesses that supply our casual food habit can adapt to the pressures they are now facing. This boomerangs back on us, as their customers. Are we willing to accept change, and ready and able to pay for it? It is hard to escape the conclusion that it is not just casual food that is unsustainable, but also our habit of casual eating and the lifestyle that necessitates it.

# Conclusion: takeaway food, throwaway economics

Nearly 20 years ago, Rupert Murdoch explained his decision to slash the cover price of his newspaper, *The Times*, by saying he thought it should cost an amount 'that was of no consequence to the reader'.



The implication was that customers wouldn't notice if they lost this sort of sum down the back of the sofa, so they might as well spend it on a paper. This is, literally, throwaway economics, and somehow it has come to apply to a large category of the food we eat. The quick, portable, cheap food we can buy from cafés and takeaways – the sort described here as 'casual food', because we seem to eat it without caring much about it – makes our busy, mobile lives possible and in a way seems to symbolise the sort of lives that we lead. But casual food requires cheap raw materials, a cheapening of the value of life and labour, and a disregard for harmful knock-on effects in the present and the future. High in low-cost calories and unhealthy nutrients, it displaces more nutritious food from our diets so we become fatter and less healthy. And because it is of so little consequence, we feel able to eat what we want and chuck the rest away – wasting all the resources used to produce it, and effacing the labour that went into it. This is a way of eating and living that is inherently unsustainable.

We said at the outset that the economy of your local sandwich shop or Chinese takeaway is a microcosm of what is troubling about the wider economy. This research has provided a clear illustration of how economic sustainability, especially for low-cost, low-margin enterprises such as the cafés and takeaways of the casual food sector, can often only be maintained at the expense of the other two legs of the triad: environmental and social sustainability. Put the other way round, this means that taking steps to improve environmental or social sustainability – for example, by raising the quality of the food or providing workers with better pay and conditions – is likely to increase costs to such an extent that economic sustainability is threatened.

Fundamentally, this is because we are accustomed to paying an unrealistically low financial price for our food, which has allowed us to see it as something without much value – something we can afford to be casual about. If fair prices and fair terms of trade were to be applied during every transaction in the food chain, and negative knock-on effects realistically costed in the final price, we might have very good food, but many fewer people would be able to afford it. This hardly represents justice. So then what? Possibly we need a new system of exchange in which food – which represents the interaction of human care and skill, over time, with natural resources to produce our most basic necessity – is not denominated in something as crude as monetary currency. The 'great transition' being urged by **nef** (the new economics foundation) may call for nothing less than a new food economy.<sup>119</sup>

In the meantime, though, we are likely to continue to find ourselves taking smaller and more opportunistic steps towards a greener, fairer future. This report focuses on what we have described as casual eating because both the cheap, energy-dense food it depends on and the quick, careless approach to eating that it facilitates seem to crystallise some of the least sustainable aspects of the way we eat and live.

But in exploring how this way of eating might sit with our aspiration for a more sustainable way of life, we came hard up against some of the dilemmas of sustainability. Our casual eating habit is fed, to a large extent, by a large number of small, independent outlets that provide some of the least healthy but most popular and convenient food around. Ostensibly, given their scale and localness, they represent a sustainable alternative to the global chains they are competing with. We found that they are only just surviving, and that their individuality and local character are in some ways more apparent than real, because their supply chains are already being homogenised. They operate in ways that help cement neighbourhoods together; and provide work for people who might otherwise be unemployed or unemployable, but the work is often precarious and is usually badly paid. They survive because the food they sell is cheap – but its cheapness comes at the cost of wider sustainability. And their food is sometimes even less healthy than similar food from the big chains. At every turn here, there are contradictions – things that look positive from one point of view look negative from another.

So the casual eating sector does embody some of the most unsustainable aspects of our approach to food, but it does so in much more complex ways than might appear at first sight. One of the central challenges of sustainability is that it asks us to make choices not just between 'goods and 'bads', but between different 'goods'.

**nef** is calling for a Great Transition to a new economy for a sustainable future. Central to this is the goal of sustainable social justice: the fair and equitable distribution of social, environmental, and economic resources between people, places, and generations. The casual eating sector can be seen as a microcosm of the challenges involved in making the Great Transition. All the dilemmas wrapped up in it – all the goods and bads it means for the people who grow it, make it, sell it, and eat it – will have to be addressed if the goals of the Transition are to be achieved.

### Implications for policy

The purpose of this report is to draw attention to a neglected area of the food system and raise awareness of the issues involved. It lays the foundation for a policy debate that should now follow, because the challenges and contradictions the report highlights require careful and balanced consideration, and need to involve many interests and points of view. The suggestions below are offered to help point the way.

*A mainstream issue.* The scale of the casual food sector and the strength of our casual eating habit are such that this can no longer be treated as a marginal activity. It should be a major concern of policy makers and all those interested in the quality and provenance of the food we eat.

*A challenge for economic policy.* If sustainability is the overarching goal of food policy, there needs to be more honest scrutiny of the potential contradictions within that ambition. In particular, of the three 'pillars' of sustainable development (society, environment, economy), the demands of the market economy cannot be met at the expense of social justice or environmental stewardship.

*Change market mechanisms.* We need a better understanding of what prevents most local outlets from providing affordable and sustainable takeaway food – and what could be done by government and business to support viable alternatives.

*Support small local businesses.* Small, independent food outlets should be recognised as vital elements in local economies. To stay genuinely local, diverse and independent, they may need targeted, supportive policies to ensure the survival of local supply networks and the availability of appropriately skilled local workers, and to raise the awareness of local customers.

*Slow down and rethink the value of 'convenience'.* Our growing reliance on cheap fast food is a symptom of hurried lives and an economy that demands long working hours and relentless consumerism – all driving us to put 'convenience' before quality and sustainability. A move towards shorter working hours and less materialist lifestyles could begin to shift the pattern of demand.

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