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# Politics of the Plate : 33



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‘Consumers are struck by the level of perplexity around food choices. They are getting so many conflicting messages from industry, science, government and journalism, that the landscape of food has become treacherous.’

*Michael Pollan, author, In Defence of Food*

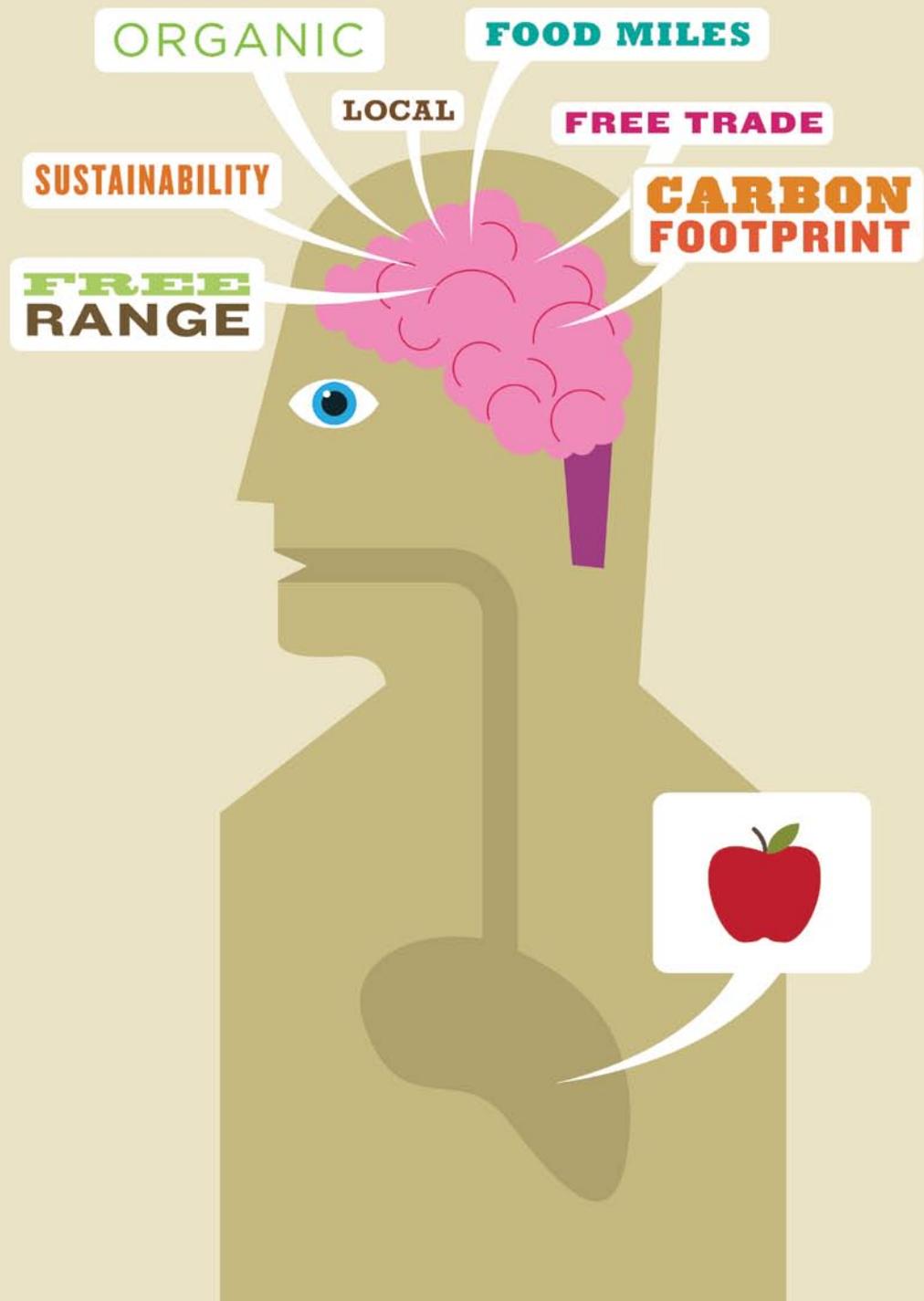
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Western consumers have come to expect cheap food. In the US, the proportion of income spent on food has halved from 20% in the 50s to 10% last year<sup>1</sup>. Similar figures can be found in other developed nations. Foods once considered luxuries, such as salmon, steak and champagne, are now shopping basket regulars.

A predicted global economic downturn coupled with the rising price of commodities due to climate change means that food is more of a political issue than ever before. The food divide is growing, not just between wealthy and developing nations, but also among social classes in Western countries. What we choose to eat has never said more about our political outlook than it does now.

BELOW : CONSUMERS NOW HAVE TO  
DECODE MANY TERMS TO ENSURE THEY  
ARE EATING THE 'RIGHT' FOOD



# Root of the problem

Long-established trading routes mean that most countries have not been self-sufficient for many years. For example, in Britain 37% of food is imported, 10% more than in 1995<sup>2</sup>. When it comes to fruit and vegetables, the proportions rise to 91% and 38% respectively<sup>3</sup>. According to the Food and Agricultural Organization of the United Nations, this year the global cost of imported food will reach \$745bn. Increasingly, domestic food security worldwide is dependent on global prices.



BELOW : IN AN EFFORT TO HALT THE GROWTH OF OBESITY IN THE US, A STUDY PAID OBESE ADULTS \$14 FOR EVERY 1% REDUCTION IN THEIR WEIGHT

## Up, up and away

A number of factors mean that global food prices are currently rising. The increase in oil prices means higher harvest and freight costs. All the key wheat-producing nations, apart from the US, have experienced poor harvests<sup>4</sup>, as climate change brings unpredictable and unseasonal weather. Increased urbanisation means that most food has to be transported; according to UN figures over 60% of the world's population will live in urban areas by 2030.

Throughout history, as nations have become richer they have consumed more meat – the nutrition transition. We are seeing this happen in emerging (and populous) economies such as India and China. The 21st-century version of nutrition transition also places cachet on imported goods in general, as another way of demonstrating status. The price of dairy has risen almost 65% in the past year<sup>5</sup>, mainly due to changing appetites in China, where demand is increasing at around 25% annually<sup>6</sup>. A third of all milk produced is now heading for China, a country with little internal dairy production<sup>7</sup>.

However, it is the diversion of crops from food to biofuels that could have the biggest impact on food prices. As well as rising prices of corn and grain-based food, the meat and dairy industries that rely on grain for feed will pass increased costs onto the consumer.

## Food riots

In the developing world, lower salaries mean the impact of rising food prices is being felt acutely. Last year, tens of thousands marched through Mexico City's streets to protest a 400% rise in tortilla prices<sup>8</sup>. Poor Haitians unable to afford rice and beans have been driven to eating 'terre', biscuits made of clay, water and shortening<sup>9</sup>.

The West is also beginning to feel the pinch. Last September, Italian consumer groups called a one-day 'pasta strike', urging consumers to boycott the national dish in the face of a 20% price hike<sup>10</sup>. The repercussions will also be felt in other countries: in the UK, pasta is such a regular in the shopping baskets of the population that it is included in the annual Consumer Prices Index (CPI).

## Label mates

While price looks to be the issue that will be most resonant with consumers, the landscape that has evolved over the past five years also brings other concerns to the fore. Since the terms 'food miles', 'carbon footprint', 'Fairtrade' and 'organic' have entered common parlance, consumers have even more terms to contend with. Superfoods, plastic bags and obesity have become the stuff of newspaper headlines, while supermarket produce displays labels from a myriad of regulatory bodies.

Take the organic debate. 'Sceptics believe the organic label to be nothing more than a marketing tool rather than a set of principles, and there are criticisms of some organic production on a grand scale,' says Peter Norton, project manager at the Bulmer Foundation, a charity promoting sustainable development. 'And with the organic market growing at twice the rate of the conventional grocery market, there are concerns about meeting the need.'

We are buying organic in droves; in 2006, organic food and drink sales hit the £2bn mark<sup>11</sup>. Yet we are increasingly confused about whether it is better for us. 'One week organic is better, and the next week it's something else,' says a member of the LifeSigns Network, our global consumer network.

Bulmer feels that more radical foodies will move to 'permaculture, land reform, and community land ownership' due to the mainstreaming of the organic movement. This provides some insight into the future direction of the green food movement.

## Wealth of health

Health is no longer a purely personal issue; it has moved into the public and moral arena. The World Health Organization predicts that by 2015, roughly 2.3bn adults worldwide will be overweight, and more than 700m will be obese; in other words, there will be an obesity epidemic. Suddenly fat is a political issue.

## Soft approach

The European Union has moved to make standardised food labelling compulsory across all member countries. Labels should display sugar, salt, fat, saturated fat and carbohydrate content. In Italy, poor lifestyle is implicated in 90% of deaths<sup>12</sup> and the Italian government has created an action plan that includes reducing the price of fresh fruit and vegetables, introducing fruit and veg into hospitals, schools and offices and increasing health education in schools.

However, some commentators are taking a far more hardline stance. In a US trial, obese adults were offered \$14 for every 1% reduction in their body weight. In Mississippi, representatives have introduced a bill that prohibits food establishments 'from serving food to any person who is obese'<sup>13</sup>.

Australian nutritionist Dr John Tickell has urged the country's airlines to treat the excess fat on obese passengers as excess baggage, and charge them extra<sup>14</sup>. While the last two examples have not been included in legislation (yet), the fact that they are subjects for open discussion underlines the increasing hostility towards the overweight.

## Fat fightback

On the other hand, fat people are fighting back. We've seen the growth of the Fatosphere blogging community, which features contributors such as The Rotund, Fat Chicks Rule, Fatgrrl and Big Fat Deal. In an interview, Kate Harding, founder of the Shapely Prose blog, said: 'What we're saying is that exercise and a balanced diet do not make everyone thin<sup>15</sup>.'

## Greenhouse gases

The next area for green campaigners to explore in the public arena will be the environmental impact caused by food production, including deforestation. Vegetarians can prepare to take the moral high ground, as scientists single out reducing meat consumption as a way to cut emissions. 'The environmental issues in meat-eating are very serious, and meat-eating is very unsustainable. It becomes more sustainable if we do it well and use it all,' notes Michael Pollan.

Global agricultural industry accounts for a fifth of greenhouse gases, with livestock accounting for a high proportion of this<sup>16</sup>. The UK's food and farming footprint is up to six times the area of the food-growing area itself, according to the Stockholm Environment Institute<sup>17</sup>.

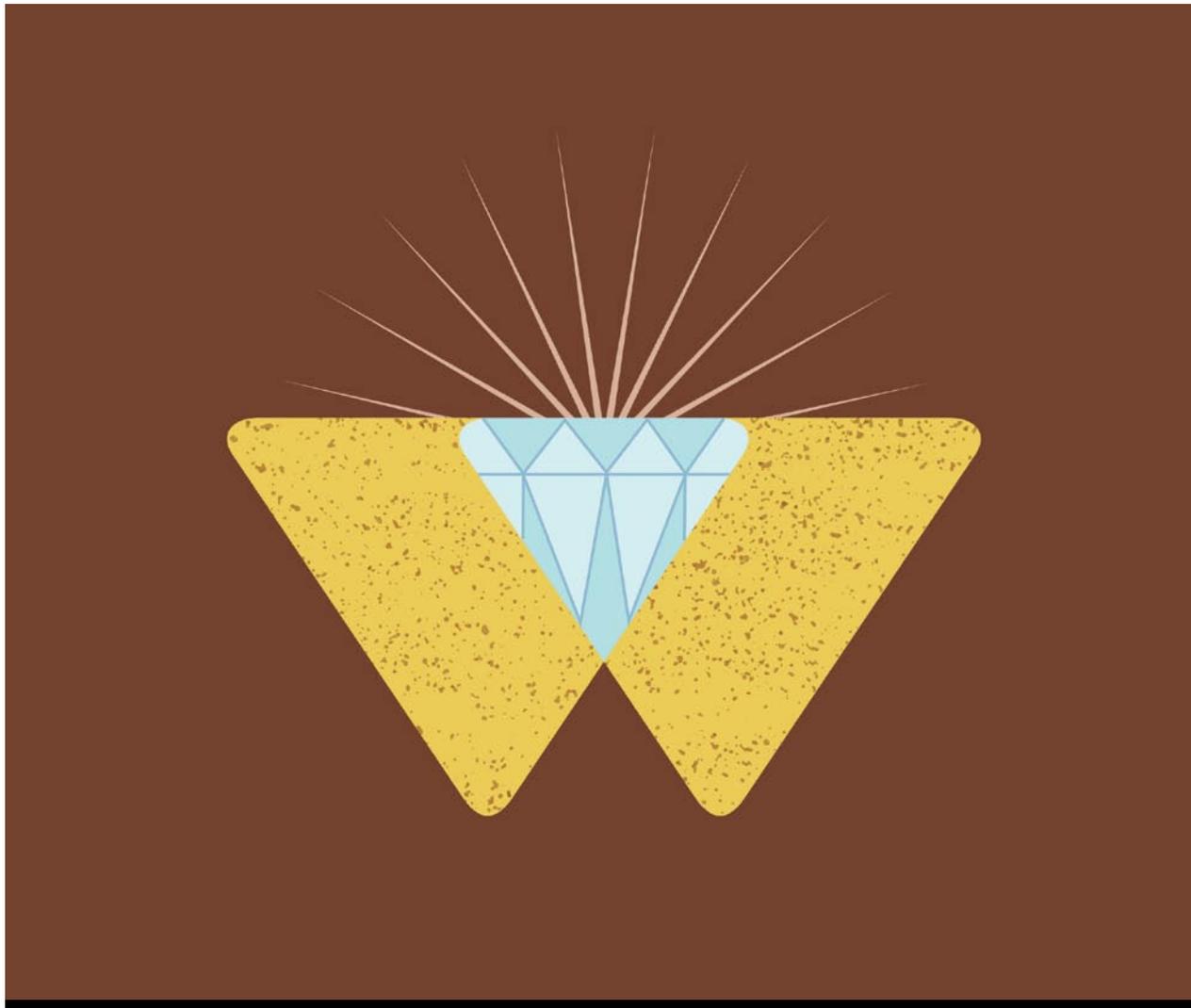
## Thought popcorn

Food documentaries have shifted from singling out and exposing the unhealthy food and practices of the fast food industry (Super Size Me, McLibel, Fast Food Nation) to investigating the food production industry as a whole, bringing yet more issues to public attention.

Darwin's Nightmare concerns the fishing industry in Tanzania, where Nile perch fillets are flown out to European markets while locals make use of the discarded skeletons. Black Gold aims to highlight the injustice of a world where cappuccinos cost £3 but coffee growers are impoverished. Sharkwater uncovers the illegal finning industry that provides shark fin soup. Our Daily Bread shows impersonal and industrial methods of food production in vivid detail.

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BELOW : THE 400% RISE IN TORTILLA PRICES HAS LED TO INCREASING UNREST IN MEXICO



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# Positive purchasing

While consumers feel largely powerless to stop climate change, they are voting with their feet and choosing products which have a positive impact on the environment and their fellow humans.

## Slow down

In Europe and America, the Slow Food movement has increasing power over what we eat. 'Slow Food believes in the philosophy of good, clean and fair,' says a spokeswoman. 'These concepts relate to food in all its forms, from the ground to the table.' There are 86,000 members of the Slow Food movement worldwide with offices in Italy, Germany, Switzerland, the US, France, Japan and the UK.

In his book *In Defence of Food*, Michael Pollan, professor of science and environmental journalism at UC Berkeley, extols the virtues of real food over processed. 'When you process foods, they lose not only nutrition, but taste, and that's why you have to fill them with fat, salt and sugar,' says Pollan. 'You're making up for something that's been lost.'

## Inverted quarantine

However in America, we are seeing self-preservation as a driver of healthier eating. In his book *Shopping our Way to Safety: How we changed from protecting the environment to protecting ourselves*, Andrew Szasz identifies the 'inverted quarantine' phenomenon. Consumers are isolating themselves and their families from the perceived danger of their local environment by buying into organic, filtered water and natural goods. Using their power as consumers, they are acting to protect the individual. The Soil Association's Organic Market Report found that British households with children under 15 bought a wider range of organic produce than childless households.

## Responsible carnivores

In the UK, tv chefs such as Hugh Fearnley-Whittingstall, Jamie Oliver and Gordon Ramsay bring issues related to meat production and animal welfare to a mainstream audience. Fearnley-Whittingstall's show *Hugh's Chicken Run*, part of Channel 4's *Big Food Fight* strand, drew 3.4m viewers. After being denied access to commercial ventures, Fearnley-Whittingstall created his own factory-style chicken farm to highlight the living conditions of the animals.

## Animal welfare

'Consumers do want to know more, they want to know how their animal is reared,' says Leigh Grant, chief executive of Freedom Food, an RSPCA-sponsored animal welfare scheme. According to a survey by UK supermarket Co-op, Britons are more concerned about animal welfare and fair trade than climate change<sup>18</sup>. Just 4% of the 100,000-strong sample rated climate change their top priority, compared to 25% who supported better animal welfare and 27% who prioritised ethical trading. In response to these findings, the supermarket chain has removed all caged hen products from its shelves and is converting its entire hot drinks range (tea, coffee, hot chocolate) to Fairtrade.

The making of foie gras, where geese are force-fed to change the consistency of their livers, has long been considered a cruel practice. Chicago was the first city in the world to ban the sale of foie gras, and is likely to be followed by the state of California and the English city of York.

## Water of life

At a time when London hotel Claridge's has launched a water menu featuring waters sourced from volcanic rock, melted icebergs and the Hawaiian deep seas, costing up to £50 a litre, we are seeing a growing backlash against the waste and environmental damage created by bottled waters. Globally, we consumed 187bn litres of bottled water in 2006, a 7.6% increase on the previous year<sup>19</sup>. It takes 17m barrels of oil to produce the bottles used by Americans for water annually – enough to power a million cars for a year<sup>20</sup>.

## Renaissance of tap

Interestingly, in taste tests, tap water regularly scores highly. In a recent blind taste test carried out by Decanter magazine, Thames Water tap water came third out of twenty-four, behind only Waiwera and Vittel<sup>21</sup>. Why then, are we drinking so much bottled water? In an investigation into 'rip-off mineral water' the National Consumer Council found that 20% of consumers are too nervous or scared to ask for tap water in restaurants<sup>22</sup>.

In London, Thames Water is launching a campaign to convince caterers to offer tap water. In San Francisco, restaurants Incanto and Poggio pioneered the serving of filtered tap water five years ago. Now other restaurants in California and New York have followed suit. In Paris, tap water is served from Pierre Cardin carafes. In Chicago, a five-cent levy has been introduced on bottled water. In San Francisco, civic staff cannot use public money for bottled water, while many government ministries in London have switched to filtered water after their bottled water bills were revealed.

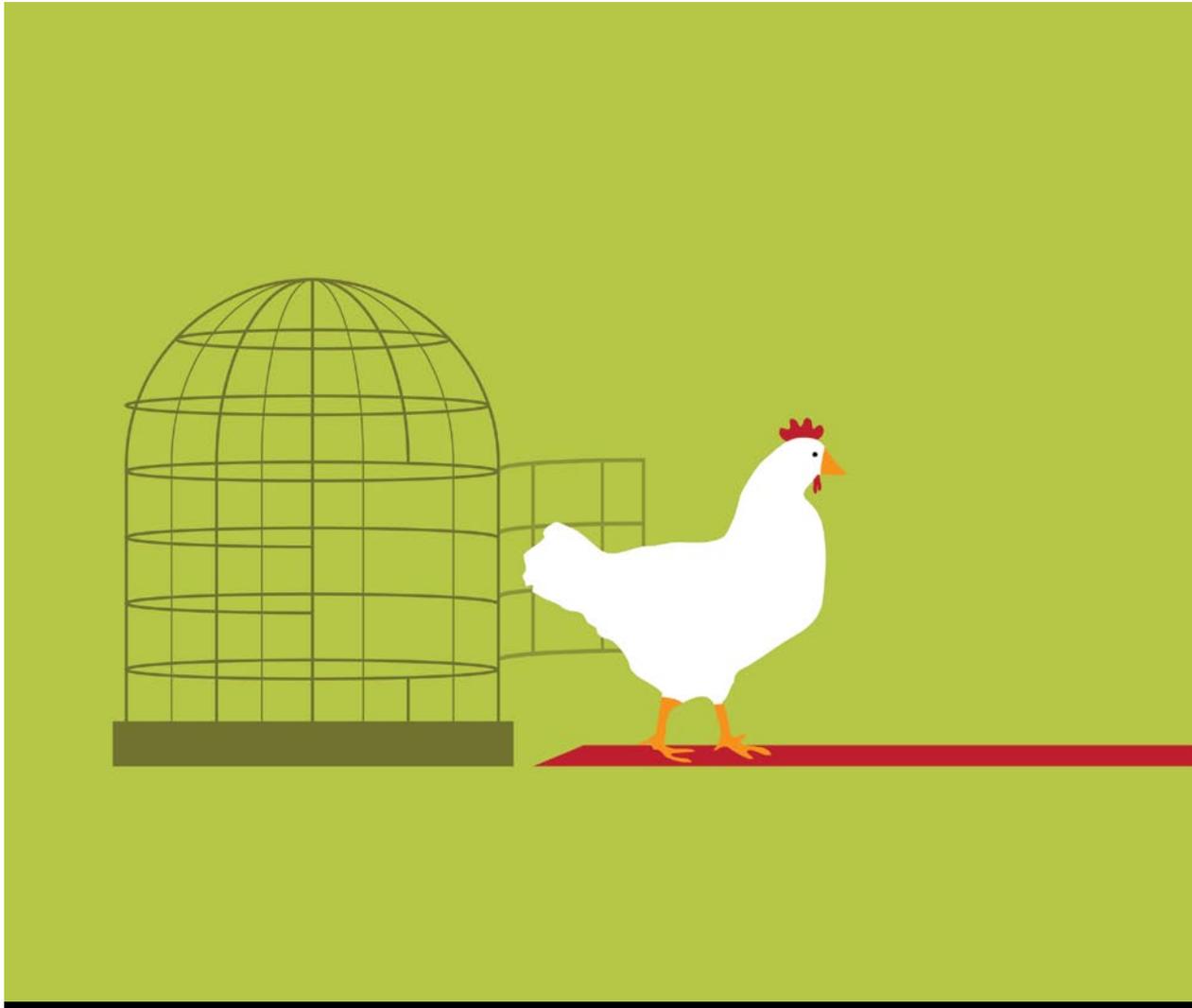
## Water: behind the scenes

Virtual water is the amount of water that is needed in manufacturing and food production. In 2006, economists estimated the world's annual virtual water trade to be 1,000 cubic km, or the equivalent of twenty Nile rivers<sup>23</sup>.

Later this year adventurer and environmentalist David de Rothschild will build the Plastiki, a raft made entirely of plastic bottles and other recycled materials. He plans to sail from the US to Australia to draw attention to the consumer dependency on plastic. He will sail through the Eastern Garbage Patch, a rubbish-strewn area of the Pacific Ocean that has accumulated rubbish and flotsam equivalent to an area six times the size of the UK. In 1999, researchers counted a million pieces of plastic per square mile.

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**BELOW :** THE WELFARE OF LIVESTOCK IS BECOMING A MORE IMPORTANT FACTOR IN PURCHASING DECISIONS



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# Rethinking price

In Britain, consumers aged below 50 have never experienced food inflation<sup>24</sup>. Paying more for food could mean that consumers rethink its real price. Energy-inefficient, centralised food supply systems will become too expensive to maintain.

## Food metres

Consumers are increasingly worried about the 'carbon footprint' of transporting the contents of their shopping trolley. Grapes from Egypt, basil from Israel and green beans from Kenya are favoured over British and European produce by supermarkets. In response to shoppers' concerns, Tesco is developing a label that will map the carbon footprint of products, including tomatoes and orange juice.

Local food has been positioned as an environmentally friendly alternative by green campaigners, not only because it is transported for shorter distances but also because it promotes biodiversity. If the growing cost of transporting food is passed on to customers, will local become even more appealing? According to a Nielsen study, 57% of Britons already actively try to buy local. 'The local food, farmers' market and community-supported agriculture movements have done an amazing job considering the odds they're up against,' says Alex Steffen, executive editor of Worldchanging.

In the UK, the Localfoodshop website provides a directory of local suppliers. In the US, LocalHarvest uses a Google Maps mash-up to show local farmers' markets, farms, organic restaurants and co-operative grocery stores. A study by the New Economics Foundation think-tank found that every £10 spent locally is worth £25 to the local community, while the same money spent in a supermarket is worth £14. 'Local has captured the public imagination and people want to know the provenance of their food,' says Peter Norton of the Bulmer Foundation. 'But, of course, local doesn't necessarily mean responsible.'

## Clocked mileage

A growing number of academics believe that food miles are not the only consideration. As discussed previously, the energy consumed in food production is now on the radar. Researchers at New Zealand's Lincoln University found that, taking into account factors such as harvesting techniques, fertiliser use, renewable energy applications and water use, New Zealand lamb produced 1,520 pounds of CO<sub>2</sub> emissions per ton to British lamb's 6,280 pounds<sup>25</sup>. This may seem surprising, but New Zealand lambs are raised almost solely on pastures, whereas the British lambs' diet is supplemented by feed, which has its own carbon cost. A report by Manchester Business School for Defra also found no evidence that locally produced foods were more environmentally friendly than imported items.

## Home cooking

Ernst & Young reports that, after taxes and bills are paid, the average household has only 22% of its income left, down from 28% in 2003. As recession looms, we expect that consumers will tighten their belts.

Currently, Americans spend approximately half of their overall food spend on eating out<sup>26</sup>. In the UK, this percentage is 33%<sup>27</sup>. 'Eating out means that people have become more adventurous in their tastes,' says Leigh Grant of Freedom Food. 'They are much more likely to try something new. I believe people will eat out less, but want to maintain better quality in what they cook at home.'

## Bargain shoppers

A generation of affluent shoppers in Europe is turning to discount superstores such as Netto, Aldi and Lidl, where the quality of food is deceptively high. In the UK, one in five Aldi shoppers is class AB<sup>28</sup>, drawn by £5 lobsters, antipasti, charcuterie and cheap, good-quality wines. These discount shoppers are confident enough in their tastes to not need to hide behind expensive brand names.

## Packaging news

Mintel statistics show that two out of three consumers feel that retailers use too much packaging on their products and over half feel that all packaging materials should be easy to recycle. Packaging, or lack of it, is definitely on the consumer agenda for 2008 and beyond (see Futurepak, p113).

The plastic milk bottle could be replaced by pouches, which use 75% less plastic. Consumers then fill a jug at home, similar to the way water filters are used. Pouches are also being considered by wine industry innovators, including Arniston Bay. Euromonitor data suggests that this approach could be successful. Growth of stand-up pouches has risen to 99.2m units in Western Europe<sup>29</sup>. Pouches, being lighter, are also cheaper to transport.

At the Unpackaged store in London, consumers bring their own containers to fill with organic wholefoods. Will we see this innovative approach being adopted by mainstream retailers? Research carried out by Tesco found that 60% of customers would use refillable containers 'if more options were available'.

## I'm not a plastic bag

Governments and local authorities are turning against the plastic bag. In Maharashtra state in India, some local councils have banned the production and use of ultra-thin plastic bags. China too has done this, leading to the closure of the factories that manufactured them.

'Packaging manufacturers are having to cope with the rising price of raw materials and transport, so it is in their interest to keep packaging amounts down,' says Gordon Carson, editor of Packaging News. The Co-op supermarket is planning to re-design its own-brand wine bottles, to save 450m tonnes of glass a year<sup>30</sup>. The French brand Danone has granted the University of Belfast £2.5m to research ways in which nanotechnology could be used to create lighter packaging. Sainsbury's is launching a collection of clothes made out recycled plastic packaging, including soft drink bottles, fruit and vegetable packaging and even meat trays.

However, Carson feels that the government and media are misleading the public over packaging. 'Addressing recycling infrastructure is a more pressing issue than recycling, as most recyclable packaging ends up in landfill.'

## Pet dinners

Even when products are labelled as organic, this does not signal commitment to animal welfare. As long as the feed is organic, and the animals are not cooped up and have access to outside space, any resulting produce qualifies for the magic label. Consumers who have been led to believe that organic is better are beginning to ask questions. 'We have seen some consumers take traceability and authenticity to the extreme by rearing animals themselves or developing personal relationships with particular farmers,' says Amanda Gore, founder of trend agency PSFK London. 'Consumers want to feel good about the meat they eat and how better than to know that the animal wanted for nothing while alive?'

In the US, there is a trend towards meat that has had five-star treatment. Companies such as Veritas, D'Artagnan and Niman Ranch make available masses of information about every piece of 'artisan meat' they sell. Consumers know what the animals ate, where they roamed, where and how they were slaughtered and sometimes even their name!

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# Food insecurity

We are beginning to see consumers take matters into their own hands by producing their own food. UN Development Programme researchers have found herbs growing on rooftops in Santiago, cacti in Mexico City and pigeons kept in Cairo.

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BELOW : CLONED AND GM FOODS MAY  
BECOME MORE ACCEPTABLE IN THE FACE  
OF FOOD SHORTAGES



## Urban farmers

To reduce the distance food travels and increase the self-sufficiency of cities, it will be imperative that land is earmarked for food production when cities expand. In Shanghai, one of the world's fastest growing cities, consultancy firm Arup is co-planning a satellite eco-city, Dongtan, to accommodate the incoming population. The city will feature waste management recycling, natural wetlands and will spread the population out to maximise energy efficiency.

## Vertical farming

'We do a lot to protect ourselves from the elements, but nothing to protect our food,' says Dr Dickson Despommier, professor of environmental health sciences at Columbia University. Despommier and his staff have suggested 'vertical farming' as a solution to the food production problems envisaged by reports such as the UN's Food and Agriculture Organization's 'State of Food Insecurity in the World', which looks at how changing weather and distribution networks are affecting world hunger.

Vertical farming would see custom-built high-rises in cities, containing indoor farms that could provide for the local area and beyond. Using sophisticated agriculture techniques such as hydroponics would mean shorter growing cycles and increased output. 'In a vertical farm you can grow crops in ideal conditions, which never happens in nature,' says Despommier. 'Provide the exact conditions that the plant needs and it will perform perfectly.'

## Frankenstein foods

At the other end of the spectrum, we see some consumers opting for cloned or GM foods. The decision of the US Food and Drug Administration (FDA) to give the go-ahead for cloning animals means cloned meat will soon be available for human consumption. In the UK, cloned milking cow Dundee Paradise will be allowed to breed. Once it took generations to introduce new traits to breeds, but now this can be done in a laboratory. Cattle could even be cloned to reduce their methane emissions, lifting the burden on the environment.

For consumers who now believe that natural and organic are the best, will accepting scientifically modified foods be too much of a shift? Consumers trust natural food because it is tried and tested – the effects of cloning livestock remain unknown.

However, attitudes to genetic modification have altered. The Food Standards Agency's Consumer Attitudes to Food survey found that only one in five Britons were concerned about food safety in relation to GM foods. This is a marked change from consumers who were 'cautious, suspicious or outrightly hostile about GM crops' in 2003, according to the government's GM Nation consultation<sup>31</sup>.

'GM crops outside Europe have been steadily spreading without any of the predicted disasters,' says John Landell Mills of Agronomica, a research and consultancy firm covering sustainable agriculture. 'There is also a growing public awareness that, firstly, GM can contribute to tackling global warming by developing drought-tolerant crop varieties and secondly, several major crops like bananas, potatoes, maize and wheat face extremely serious disease and pest threats to which a GM approach is by far the best and probably the only real answer.'

## High price, high quality

'Prices are already going up,' says Marion Nestle, author of the book *Food Politics*. 'With this price rise consumers will expect increases in quality.' Consumers in the US and UK are used to a two-tier system in supermarkets where organic and health foods are priced higher. Consumers expected to shell out more for even the most basic food will expect better quality and taste all round.

## Positive change

Brands that honestly and unceremoniously effect positive change will be the winners for consumers who are cynical about greenwash but desperate for change. Fairtrade has been successful because consumers feel that they understand what it stands for and agree with its principles. IGD, the grocery retail analyst, predicts Fairtrade spending will reach £585m a year by 2012.

## RFID

New ways for consumers to monitor the authenticity of their food will be welcomed with open arms. In Italy, a consortium of ham producers has trialled the use of radio frequency identification (RFID) chips to track its prosciutto from piglet to plate. The Consorzio del Prosciutto di San Daniele's ham is trademarked, but is often counterfeited. It is hoped that the RFID chips will become a stamp of authenticity, and, as RFID readers become widespread, consumers will have a direct link to the provenance of their meat.

## Boat life

The French wine industry has come under attack from cheaper New World imports. Now some French vineyard owners are fighting back by making the transit of their wines greener. For example, 60,000 bottles of wine will be shipped from Languedoc to Ireland in a 19th-century sailing ship. The process will take a week longer than airfreight but will save almost 5oz of carbon per bottle. Ships will return to France full of empty bottles for recycling. Why don't brands think about transporting items by barge using canal networks rather than by road?

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## What this means to your brand

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For food brands over the coming decade, total transparency is the absolute bottom line: total visibility of all aspects of your sourcing, manufacturing, labour and supply chain management processes, right up to the moment that the product arrives in-store. Some consumers are concerned about obesity-related issues (your product's fat, sugar and salt content), while for others it is about ethics ratings, and for others still, the CO<sub>2</sub> footprint from plough to plate.

As our research indicates, consumers are increasingly bundling these issues and concerns together to create a portfolio of interconnected 'moral benchmarks'. These now require brands, products or retailers to be totally transparent about their 'SECH' (social, ethical, cultural and health) rating.

Brands will thus require a more joined-up approach to addressing the needs of 30 and 40something consumers; the group that is spearheading this shift in brand reporting and benchmarking.

We believe that segregating the health, wellness and nutritional values of your product from its sustainability rating and sourcing will become increasingly problematic. It will even suggest that you are attempting to hide less desirable attributes by promoting less contentious ones.

If all this sounds complex, it isn't. It is merely a matter of simplifying processes from the inside out and the bottom up. Start now, following the example of brands such as Marks & Spencer and Waitrose in the UK, Target in the US, Coin in Italy, Carrefour in France and Dunnes in Ireland. These brands have all identified areas for change; and are using these changes to identify other future problem areas and future policies.

This involves effort. It is about ongoing dialogue in public (with consumers) and in private (with your internal teams and partners) to make your brand increasingly transparent, while demonstrating the realities and difficulties of doing so. It is not about 'greenwashing' areas and ignoring more problematic aspects of your brand.

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A simple example of this is the 'traffic light' approach to nutritional content labelling, versus the numbers-driven approach used by some brands.

The first approach (favoured by consumers, incidentally) suggests that a brand is being honest and forthright in its attempt to 'unpack' a product's values, according to our research. Brands which offer up only a series of numbers, however, are seen as confusing the issue by the time-pressed shopper. Product information that relates to a brand's SECH rating should be clear, simple, unequivocal and exhaustive.

Ask yourself the following. Can your message be digested in five to seven seconds? This is the average time people spend 'pack scanning' before purchase. If it can't, then it shouldn't be there – unless you are deliberately trying to fudge an issue or evade key consumer concerns. Increasingly, shoppers will believe that those who don't are simply lying, though in a not-so-simple way.

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