From 'value-for-money' to 'values-for-money'? Ethical food and policy in Europe

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Abstract

The paper considers how ethical food raises complex challenges for policy-makers. Looking mainly at Europe and developed countries, it suggests that the notion of ethical food is plastic, but that therein lie its strength and appeal. Civil society movements see it as a rallying point to restructure food systems, from land use to consumption. The mainstream corporate sector sees ethical food as an umbrella term under which many, sometimes even competing, aspirations nestle, but which can be incorporated as additional niche markets. Far from being new, the ethical food banner in the late 20th century has resurrected some older traditions, including those which contested power

relations in the food system. But in the 21st century, with the world's food system under economic, environmental, social and political stress, the ethical food umbrella faces an uncertain future. It could be submerged by 'value-for-money' consumerism; or it could become a champion of what the paper calls an emerging set of 'omni-standards', under which fragmented single issues coalesce and articulate a new paradigm.

Keywords

Ethical food; food ethics; Europe; food policy; omni-standards;

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This paper proposes that the notion of 'ethical food' raises complex questions for policy, business, the state and consumers. As the term, and the realities behind it, strengthen, it is contributing to a revitalised debate about what land is for. Ethical food, here, is used as a shorthand for a set of ethical concerns raised about food: how it is produced, the meanings it carries, the implications and legacies it leaves. Looking mainly at the discourse on food ethics in the European Union, the paper argues that ethical food covers diverse values, each appealing to behaviour change for different reasons and effect, and to different relations in supply chains. The appeal of ethical food lies partly in its malleability or plasticity; it takes diverse forms, including issues such as animal welfare, sustainable agriculture, fair trade, low waste systems, and 'healthy' or local food. For policy-makers until very recently, it barely featured other than as a term to cover a *potpourri* of single issue campaigning groups which began to emerge in the 1970s and '80s. For that reason alone, ethical food has become significant, a loose appeal for land and food to be shaped by other values than the market forces which drove the restructuring of food systems from that period.

The core proposition is that a better food system is possible and higher moral standards can be injected into markets, but this requires confrontation or subversion of the conventional policy view that consumer behaviour is driven mainly by price, convenience and safety. Thus, ethical food challenges the 'value-for-money' ethos which has dominated Western food systems in the second half of the 20th century. The appeal of ethical food is to move towards a 'value<u>s</u>-for-money' ethos. Despite having a soft image and appealing to decency ('niceness') and high moral standards, there is an underlying hardness in ethical food. It confronts some of the core values of consumer capitalism: the 'right' to unalloyed choice, purchaser power, the pursuit of lower prices, ignorance about the nature of production, an 'end-of-supply-chain' utilitarianism.

By confronting such perspectives on food in the late 20th century, social movements championing improved ethics in food systems have slowly but inexorably reconnected with older political analyses and traditions which learned that food systems do not change easily, and only change at great social cost. Edward Thompson, for instance, itemised the pain and dislocation as residual mediaeval values of obligation and mutuality were swept away in the transition to harsher, more individualised capitalism in late 18th century England.(Thompson 1993, Thompson 1993 [1971]) The notional rural morality to share scarce food was replaced by a new urban 'sauf qui peut'. In this respect, the rise of ethical food resuscitates Europe's long history of conflict over land; food prices; how to feed urban and industrial centres safely and affordably; food adulteration; and corporate control.(Braudel 1974, Lang et al. 2009) Equally, the new ethical movements have rediscovered an older truth that food systems are overwhelmingly controlled by powerful forces and interests, as they negotiate with powerful processors and retailers, the modern gatekeepers of access to the consuming public.(Lamb 2008) Having high ethical standards is not enough to win market share for ethical products; that entails winning public support, sometimes class action, daring to confront existing land use and ownership, and forging international rather than localist or nationalist solidarities. Liberal values and neo-liberal markets can conflict.

Over the last two decades, ethical food markets and movements which champion single issues within that umbrella term, have grown remarkably (see below). That growth might now be halted by major structural changes and shocks stemming from crises over energy, water, climate change, land use and financial recession,(Ambler-Edwards et al. 2009, Evans 2009) but it was the rapid spike in food price rises 2005-08 which really raised the political profile of food policy. Both the dominant 'value-for-money' consumerist and 'values-for-money' ethical perspectives are challenged by the return of an older Malthusian debate about population and feeding capacities. In 2008, the FAO estimated that 33 countries required special food assistance and 69 countries took at least one form of policy action to combat food insecurity.(FAO 2008a) Although prices fell in 2008, they did not revert to 2005 levels, and for the first time for decades, the confidence that food prices continually drop was dented.

From ethical food to ethical policies in Europe?

There is wide agreement that ethics has moved from the fringe to mainstream of contemporary food in European and other markets. In a 2006 speech, the European Commissioner for Agriculture Mariann Fischer Boel went further, suggesting that ethical foods could play a significant role in re-orienting Europe's food system for the 21st century.(Fischer Boel 2008) She proposed this fully aware that international trade policy negotiators are wary of social regulations being used as soft barriers to trade and vehicles for economic protectionism. In a world where food capital can roam the world for wherever land, labour and the costs of food production are suitably cheap, how can the European Union (EU) pursue high standards if these bring additional costs which then make EU foods ‘uncompetitive’?

Mrs Fischer Boel, herself a Danish farmer, outlined the world of food as dividing into two broad market categories: bulk and high quality, implying that the former derives from mass, industrialised farming and the latter from specialised niches. Although under extreme pressure on the former, ethical foods being “situated within the latter” offered great opportunities in a world where developing nations aspire to better diets and higher quality living. By ethical foods she meant primarily but not exclusively the good treatment of farm animals and the environment. (Below a broader terrain is discussed.) “When we play our cards right, we can get a premium for these ‘qualities’” she stated. Thus ethical foods fit the new vision for CAP to deliver “high standards of environmentally friendly land management, animal welfare and public health”. She continued “[w]hen applied to food and drink, the term ‘quality’ means different things to different people. It can certainly carry ‘ethical’ connotations – telling consumers about production methods and a product's relationship to animal welfare and the environment. It can refer to geographical origin. And of course, it can refer to that specific tang of a good cheese, or the way in which a good red wine goes down so smoothly. It's essential for us to know what qualities consumers are looking for in food, and which ones will persuade them to pay higher prices. This is because of the changing international environment in which the agri-food industry now operates.”

At one level, this speech could be interpreted as charting a retreat for EU food policy from the mass production focus which had characterised the post World War 2 ideals of tackling hunger and food insecurity.(Neville-Rolfe 1984, Tracy 1989) The history of the Common Agricultural Policy (CAP) is a policy journey from production support to food branding in half a century, a belated attempt to dress the wolf of productionsim in the clothes of consumerism. For critics of the CAP, it represents the reverse, a belated recognition of market realities. Events since the 2006 speech suggest such interpretations might be premature.(OECD &FAO 2008)

Behind the EU Commissioner's apparent simple support for ethical foods lie some conceptual and policy complexities. Ethical foods is a broader as well as fuzzier concept than implied by the EU Commissioner's focus on two core features: organic farming / production and foods of proven geographical indications. As others have noted, ethical foods raise questions about the relationship between consumers, supply chains and the state, and invoke much more than branding.(Buller &Morris 2003, Goodman 1999) Most ethical foods are backed up by certification systems and imply meaningful social relationships between consumers and food, a relationship well understood and championed by civil society movements who have worked hard to put the various elements of 'ethical food' onto the policy map.(Busch 2000)

The pursuit of ethics in the contemporary food system is intrinsically a social process, an illustration of the long struggle for food democracy, defined as a situation where people have, not just adequacy or sustainability of food, but accountability and control.(Lang

2005) In this respect, the European market for and the championing of ethical food should not be taken as idiosyncratic or specific to that continent. Ethical food is essentially an oppositional notion – claiming ethics in contradistinction to 'mass' or 'ordinary' food, or seeking to improve current food systems. Although European member states have not agreed a formal ethical food policy or policy on food ethics, there are signs of the beginnings of policy engagement, not least over implied standards.(Barling &Lang 2005) It remains to be seen how deep this institutional involvement becomes and whether it does, for instance, alter land use comprehensively by being central in further reform of the Common Agricultural Policy. For the present, we should note, firstly, that ethics now has a presence in food and farm discourse and, secondly, that ethics are contested; there are diverse positions emanating from civil society, the state and supply chain interests.

Defining ethical foods: fuzzy or distinct features?

The European Commissioner focussed on two features and her main analytic distinction was to contrast ethical food with bulk food production. Significant variations in modes of production are implied. But could the fuzziness in the concept of ethical foods be reconciled with market realities? Current business analysis implies that ethics are whatever consumers want to be ethical. Market research companies such as Mintel, Datamonitor, Eurobarometer and just-food.com which track food sales and are alive to the emergence of new niche markets, tend to define ethical foods as specific markets in organics, fair-trade, free ranged foods and even what is sold at farmers markets. Their approach sees 'ethics' as anything which is not mainstream or mass market. The US business trends company MarketResearch.com, for example, has defined ethical foods prosaically as having four positive attributes - organic, fair-trade and local sourcing, and recycled / reduced / biodegradable packaging – and four negatives – no genetic modification, no additives and no added hormones, and no antibiotics.(MarketResearch.com 2007)

For its review of the European ethical foods market, the IGD (formerly the Institute of Grocery Distribution), a food industry research body, saw ethical food as a market category on offer for personalised choice at point of sale. It reviewed consumer reactions in six European countries to foods with twelve features:(IGD 2008)

- Fairly traded products
- Products produced to a high standard of animal welfare
- Free range products
- Products that have not been tested on animals
- Organic products
- Products sourced from the local area or region of the country
- Products sourced from national suppliers or farmers
- Products from sustainably managed sources (to ensure they do not run out)
- Products committed to reducing their carbon footprint
- Products which have not been transported by air
- Products with minimum or reduced amounts of packaging
- Products with recycled, recyclable or bio-degradable packaging

In effect, these were distilled to five core features: place (local or national), animal welfare, organic, fair-traded and sustainable. Interestingly, the climate change feature (lowered carbon footprint in the list above) was not seen as central, although most food policy analysts would rate it to be of the utmost importance. The Stern Report estimated agriculture to be among the greatest sources of greenhouse gas emissions.(Stern 2006)

One of the first large-scale food businesses to champion the new wave of food ethics was the co-operative movement which saw ethical foods as a defining characteristic for what it termed “responsible retailing”.(Co-operative Wholesale Society 1996) The European co-operative movement grasped ethical food as a return to its mid 19th century roots, providing decent, unadulterated food produced in conditions which ordinary consumers could be proud of. Fair traded products became the bell-weather for this new ethical stance.(Cowe &Williams 2000, Euro Coop 2007) The UK co-operative movement has defined ‘ethical consumerism’ as “the practice of purchasing products and services that actively seek to minimise social and/or environmental damage, and the avoidance of products deemed to have a negative impact on society or the environment.”(Co-operative Bank 2007) Its 2007 report on the UK markets took the following as indicators of ethical consumption: organic, fair-trade, free-range eggs and poultry, use of farmers markets, vegetarian products, purchase of certified Freedom Foods (an animal welfare standard), sustainable fish, dolphin-friendly tuna and participation in consumer boycotts on ethical grounds.

In its review of the European market, the IGD approached ethical food as providing three psychological functions for consumers:

- consideration: a concern for where food comes from, with solution sought in products which are organic, free ranged, animal welfare and environmentally sound.
- aspiration: delivering "what we would all probably like to do" with solutions lying in premium quality foods and delivered through healthy, 'better for you', organic and free range ingredients.
- fairness; being straightforward and 'above board', with solutions being fair-traded foods.

The Ethical Traceability project, an EU 6th framework research team, based its work on that of Michiel Korthals, the philosopher,(Korthals 2004) and identified ten ethical concerns relevant to food production.(Coff et al. 2008) In Korthals' terms, the first seven in the list below are substantive concerns, and the last three are procedural:

- Animal welfare
- Human health
- Methods of production and processing and their impact such as environmental and landscape
- Terms of trade such as whether the product has a fair price
- Working conditions
- Quality (intrinsic qualities such as taste and composition or ingredients
- Origin and place
- Trust – whether it can be trusted

- Voice – whether the product gives participation and engagement
- Transparency – whether consumers know what they need to know

It was at the concluding seminar of this project that Commissioner Fischer Boel gave her fore-mentioned thoughts, and it highlighted the distinction between product specifications and process characteristics. Like the animal rights philosopher Peter Singer,(Singer 1975, Singer &Mason 2006) Korthals is wary of allocating 'right' or 'wrong' to a food's defining characteristics, preferring to emphasise the daily, almost existential dilemmas facing the consumer. He sees equal if not more importance in the process by which it arrives on the consumer's plate.(Korthals 2004) The one European NGO dedicated to food ethics per se, the UK-based Food Ethics Council, too, places strong emphasis on the process of decision-making. Its mission statement is to challenge "government, business and society to make wise choices that lead to better food and farming". It claims to be unique in its focus on how choices are made, championing decisions that are: (Food Ethics Council 2008)

- "Principled – aiming to benefit people, animals and the planet, and to treat each fairly and with dignity.
- Informed – based on sound knowledge and diverse experience, but ready for surprises.
- Inclusive – involving and answerable to the people they affect."

At the global level, the UN's Food and Agriculture Organisation (FAO) has been increasingly aware of growing ethical concerns about food production illustrated by mass public debate about issues such as pesticide use, genetic modification, animal exploitation and social inequalities in food. For decades, the FAO was itself the butt of strong criticism by civil society organisations over issues such as agricultural intensification, pesticide use and lack of commitment to sustainability. After initial resistance, to its credit, the FAO slowly began to respond to these criticisms. In 2000 it created a Panel of Eminent Experts on Ethics in Food and Agriculture Panel to advise the Director-General, re-appointed for a further four years in 2004. This, too, focussed on processes more than products. Its formal function was to provide the D-G a commentary on ethics and to help centrally with “maximising benefits and minimising risks”. The Panel’s first report laid out the grounds for its involvement, reflecting and reinforcing its brief to centre on food security and hunger. It noted key differences between different philosophical schools with regard to ethics (notably utilitarian versus libertarian) and the ethical implications of actions. The Panel has reasserted the importance of the 1948 Universal Declaration of Human Rights as articulating the value of the “right to an adequate standard of living, including food”.(FAO 2001) The Panel has made a number of far-reaching recommendations to improve ethical policy-making such as:

- mechanisms better to balance interests and resolve conflicts;
- stakeholder participation to encourage individuals, communities and nations to do what is ethical;
- ensuring the transparency of information and decision-making;
- fostering the use of integrated and empirical science and technology in the service of a more just and equitable food and agriculture system;
- developing codes of ethical conduct where they do not currently exist.

The Panel’s second and third reports continued this broad focus on process.(FAO 2005)

To some extent, ethical food is self-referential, being whatever champions define as ethical. Fair trade and animal welfare movements, for example, espouse the term ‘ethical’ while the organic or vegetarian movements might not, while not being averse.(Coff et al. 2008) There is no EU-wide definition beyond single issue articulations, yet the food sector thrives on having to create measurable standards to enhance traceability and consistency. On the other hand, part of the value of the term ‘ethical food’ is its breadth. As Barling has argued, ethical concerns have both subjective and objective features, the former being core to why ethical foods have been such important rallying points for civil society.(Barling 2009) But can equal weight be given to the protection of, for example, animal welfare, environmental and health, or are trade-offs inevitable? Can one have a food system which delivers on all attributes or do gains in one imply losses in others? Before returning to this issue, we need to clarify how and if ethical foods are really denting mass markets. Are they transforming the nature of food production, distribution and consumption , or are they merely added niches in crowded food markets?

How significant is the ethical food market?

The IGD European survey concluded that ethical food shopping is now “mainstream in Europe”.(IGD 2008) 69% of the 4000 shoppers it polled in six European countries reported that they actively looked for a product which met one of the five main features at least some of the time, with a quarter considering two or more ethical factors when shopping. Of the six countries (France, Germany, Great Britain, Spain, Netherlands, Poland), Great Britain had the greatest proportion of shoppers showing the highest commitment to ethical shopping by range and depth; Germany and the Netherlands cared about some issues but not all; France had high intentions but these were not translated into purchases; Spain and Poland were least motivated but, where they were, it was mostly by a "passion for local and national sourcing" rather than by other aspects. Priorities varied between countries. The French were most interested in environmental issues; Dutch in animal welfare; the Poles in local sourcing and the British shoppers across the widest range of ethical issues. 41% of the British incorporated at least one ethical issue into their routine food shopping, compared to 34% of German and Dutch shoppers and 31% of French, but a further 37% of French shoppers reported that they sporadically bought ethical products. By contrast, only 12% of the Spanish and 14% of Poles reported themselves to be dedicated ethical shoppers. IGD concluded that the market for ethical foods has huge potential to grow further and is only held back by two key factors: price and availability.

Independent data on ethical food markets in Europe are sparse. Of the ethical movements, organics and the fair trade movements have been most diligent in collating information. Most business surveys rely on a mixture of company sales data and estimates. According to the EU-funded European Fair Trade Association (EFTA), the fair trade market in 25 member states in 2005 was valued at €660 million, but this included non-food products.(Krier 2006) In Switzerland, for instance, fair-trade flowers have 28% of the market for cut flowers, while 47% of all bananas sold there were fair-traded and 20% of all coffee. 55,000 supermarket shops offer fairly traded foods in Europe with Germany having 23,000 such outlets, France 10,000, the UK 3,100, Denmark 1,000, Austria 2,000, Ireland 250 and Sweden only 35. By value, however, the UK is now the largest fair trade market in Europe (€206 million), Switzerland (€136 m), Germany (€58,000) down to Ireland (€5,000). The UK was Europe's largest fair trade coffee market, while Switzerland is the largest banana market.

This patchwork picture, albeit with different countries leading, appears to be also true for organics the biggest sector of the conventionally defined ethical food market. In 2005, sales of organic foods in Europe were estimated to be €14.2 billion.(Richeter &Padel 2007) Globally, whereas bananas, cocoa and coffee account for the largest elements of the fair-trade market, in organics it is fruit and vegetables, 35.4% of global sales. Europe is the world's largest organic food market, taking 51% of the $43.5 billion world market. Europe now accounts for sales of $20 billion in organic foods, larger than the USA with $17 billion.(Datamonitor 2008b, a) According to the annual Co-operative Group ethical consumer reports, the UK ethical food and drink market was worth £4.8 billion in 2006, a growth of 17% on the previous year, up from an estimated £1.2 bn in 1999.(Cowe &Williams 2000, Williams &Doane 2001) In the UK, organic sales of £2 billion represent around 1% of the total food and drink market. Although these figures represent huge growth over the last decade, they are tiny in the total food market. Organics is around 1-2% of European food sales. The fair traded foods market is far smaller. In the UK, Europe's largest fair-trade market, for example, it is £0.5 bn out of a total food market of c £130bn.

Is the rise of 'ethical food' an indication that values are in transition?

The conclusion so far is that ethical food is generally a niche market, growing but still tiny. It may be watched by market makers, but has not taken over mass markets. Its influence on policy-makers <u>as ethics</u> is considerable within national markets, but it has not transformed the Common Agricultural Policy (CAP), the core EU policy, which has environmental payments under pillar 2 but no fair-trade payment scheme. The effects of the 1975 Lomé Convention, which provided some former colonial dependencies an element of market access and protection, have been diminished by the GATT and WTO agreements.(European Commission 1975) In fact, the heightened profile of fair trade championed by bodies such as FLO and the Fairtrade Foundation, stemmed from civil society campaigns criticising marketisation or globalisation, symbolised by the 1994 Marrakesh General Agreement on Tariffs and Trade. Environmental NGOs have been more influential on the CAP in the name of conservation or sustainability rather than ethics. The 2005-08 global food price crisis might alter this, as global food security re-emerges in political discourse.(Evans 2009, von Braun 2008)

The terrain of food and farming policy is never static. Over the last half century, it has shifted from a focus on farming alone to the whole supply chain; from hunger to a more complex picture of over-, mal- and under-consumption; from shortage due to war to sustainability; and from fixing problems through chemistry to unlocking the genome.(Lang et al. 2009) Europe's food has been characterised by both wealth and poverty, diversity and constraint; its history is long and troubled. But in the EU (formerly Common Market) era, the policy focus has been on increase agricultural output. The purpose of the CAP, enshrined at the 1956 Strega conference, was to create a secure framework to allow that.(Neville-Rolfe 1984) But could ethical food become a key element of EU policy? Or be part of its unique global marketing appeal? The EU's capacity to champion ethics will depend on both global circumstances and internal pressures. The recession following global banking crises has highlighted the role of consumer values not least with Keynesian-inspired appeals to spend. But European consumers are highly sensitised to food issues, after decades of scandals over safety and health.(van Zwanenberg &Millstone 2005) As a result the EU has a strengthened social framework around food policy, plus new powers on health, commitments to food safety, consumer information and scientific research; inevitably this has lead to some calls to repatriate key responsibilities.

At the same time as this European policy consolidation, there are heightened global food security fears due to climate change.(OECD &FAO 2008, Thomas et al. 2008) Food and particularly agriculture are significant sources of CO2 emissions.(Garnett 2008, Stern 2007) Much of 20th century efficiency farm gains have been due to fossil fuels, not just for mechanisation but fertilisers. Ironically, US and EU biofuel commitments to defer 'peak oil' have contributed to food commodity instability.(Commission of the European Communities 2006, FAO 2008b, International Institute for Sustainable Development 2007)

In the context of this wider picture, a key challenge for ethical food is cost. Proponents and opponents of higher animal welfare standards, for instance on pig crates and farrowing, both agree that these raise costs. A general principle almost of ethical food is that it internalises costs externalised by conventional foods.(Pretty et al. 2005, Pretty et al. 2000) Consumer surveys note that price is a barrier to greater market penetration. Ironically, in trying to help raise developing country farmer incomes, social divisions can be heightened by making 'better' food more unaffordable. Ethical food *de facto* dents the appeal of conventional food by giving it 'negative' attributes (in MarketResearch.com's nomenclature). The UK's Co-operative Group (now with 9% of UK food market share) reports privately that there are few socio-economic differences in aspirations to consume ethically but its sister Co-operative Bank's annual Ethical Consumer report has suggested that higher income groups and older people are more likely to buy ethically.(Co-operative Bank 2007) The Achilles heel of food ethics can be painted as price: cheapness *versus* ethics. As the head of one leading European food research station told this author, there is no room for ethical considerations; all will be swept aside by the need to increase production at all costs for nine billion people by 2050. His argument was that the complex, fuzzy ethics, documented by recent academic studies,(Coff et al. 2008) will be pushed to one side by the over-riding ethical case for 'production, production, production'. Food ethics will be starkly Malthusian.

Against this view is the argument that while ethical food is currently more expensive, food prices will not be able to resume the remarkable decline exhibited (in the West) throughout the 20th century. A bedrock of some new and some old 'fundamentals' will reshape food systems in the 21st century: climate change; a fuel / oil / energy squeeze; water stress; competition over land use; labour pressures; urbanisation; population increase; dietary change and the nutrition transition with accompanying healthcare costs; and social inequalities within and between countries.(Ambler-Edwards et al. 2009, Barling et al. 2008, Evans 2008, Lang 2008) All these point to the difficulty of resolution of quick technical solutions such as genetic modification. Useful though biotechnology might be – particularly if unleashed from its currently narrow corporate control as symbolized by the contentious issue of patents – it cannot resolve all the fundamentals. These are social not just technical, as the International Assessment of Agricultural Science and Technology Development Knowledge (IAASTD) recognised. (IAASTD 2008) The IAASTD was a World Bank and UN led international collaborative review which concluded that no quick technical fix was likely or possible, and that investment and support for small farmers, particularly in Africa, could yield the quickest and best returns. This report reinforced a widely held view in policy and science that the answer to 21st century food insecurity might not be technology alone but an overarching commitment to make food systems everywhere sustainable.

It is this analysis which offers potential for ethical food. On the one hand, some call for a new round of farm intensification, a redoubled effort to increase output, invent new fertilisers, apply genetic modification, intensify land use, etc. And on the other hand, there are proponents of sustainable development who place more emphasis on social and eco-systems support, and on the role of small rather than big farmers and who see human and ecological health as linked. In that policy clash, ethical food might be squeezed.

From this perspective, the ethical food movement might well become ‘harder’ and be prepared to shed some of its ‘soft’ image. In 2008, following a 2008 Oxfam Germany study of ruthless fruit pricing by two of Germany’s formidable and successful discount retailers, consumers were urged not to buy low cost fruit because of the exploitation in their supply chains.(Wiggerthale 2008) Similar tougher political edge has been exhibited in campaigns on coffee and land deals, where rich countries are buying or leasing poor developing country’s land to assure their own food security.(Grain 2008) This might presage a return to an older tradition of ethical campaigning, dating from the anti-colonial struggles.

Such a diagnosis might be premature, however. Consumerist values are now deeply held. The post World War 2 food policy framework might be in trouble but, to the European consumer, lower prices and regularity of supply have become the basis for domestic expenditure patterns.(Lang et al. 2009, Ostry 2006) Huge investment went into scientific support and farm restructuring. The initial agricultural revolution was then deepened by supermarketisation. Together a culture change was enabled, giving previously unimaginable increase in choice, range, convenience, a-seasonality (all year round sourcing), and redefinition of quality (appearance).(Lang 2003) This supply chain model had barely three decades of success until the 1970s before meeting criticism, firstly, about the environmental impact of inputs such as pesticides and nitrogenous fertilisers on ecology, secondly, about human health and thirdly about stalling productivity. The latter was addressed by the green revolution but is now resurfaced. The environmental critique has grown consistently over time, although early advocates such as Rachel Carson were bitterly rejected. The health critique however was barely acknowledged by the then dominant production-focused food policy. The health case centred on the early signs of growth in non communicable diseases such as coronary heart disease and some cancers due to dietary change shaped by plentiful supplies (particularly of fats), but also safety issues such as hormone use in meat and contamination by pathogens such as salmonella. In the 1980s and 1990s the relative profile of each of these issues was, if anything, compartmentalised. The ecological and health arguments tended to be championed in the West, and the production question in the developing world.

This dichotomy – rich world / poor world – is beginning to be questioned by modern food ethics. Although still characterised by single issues, the notion of ethical food brings diverse discourses under one heading. The question is how embedded is the composite analysis? Are single issue ethical movements actually in competition with each other? There are tensions within single issues, for instance between more and less radical positions. But the future might be one where gains come from melding rather than retaining diverse issues. In consumer terms, is the future of ethical food once where consumers have to go to different parts of the supermarket to 'buy' each value or can all the values infuse all the shelf space?

At present, Western consumer surveys suggest that price, convenience and safety are central to food choice, but other values have become significant too. One international survey in 2006 by a business information body reported high but variable levels of ethical concern.(Henley Centre 2006) It found high 'positive' and 'negative' values, with positive attributes being those which have guided consumers to buy and negative ones guiding their avoidance. Looking at Italy, Spain, Australia, Germany, France, Japan, Turkey, USA, UK, Czech Republic, Russia, Poland, India and Brazil, it found fairly consistent patterns within countries in relation to avoiding negatives in relation to health, ethics and environment. The highest levels of action against companies were reported in Italy, Spain, Australia, Germany and France, and the lowest in Russia, India and Brazil (all relatively low income countries).

The European Commission's Eurobarometer attitudes survey does suggest that long-standing European consumer concerns about food safety are now accompanied by rising concerns about food prices, food security and trade.(Eurobarometer 2008) Animal welfare, a core 'ethical' concern, is also now an issue which EU citizens rank highly when choosing food.(Eurobarometer 2007) This was a shift from an earlier 2001 study which had showed some concern for animal welfare but that this was low and 'multidimensional'.(Harper &Henson 2001) By 2007, Eurobarometer found that over 70% of respondents in 25 EU countries supported the idea of financial rewards for producers who apply high animal welfare standards. There was also strong consensus (89%) that imports should have to be produced under the same animal welfare conditions as those originating in the EU.

Trying to make sense of such findings, most European food retailers position their 'offer' on food ethics as to be decided by consumer choice, a 'pick'n'mix' food ethics. In addition, there is the much researched issue of gaps between intended and actual behaviour, between attitude and action. IGD has proposed a model (see Figure 1) in which most people are 'disengaged passive' ethical consumers, for whom product choice drivers are predominantly functional: price, convenience, brand, health, freshness, the issues highlighted on the left of the Figure. The more engaged consumer is putting 'principles into practice'; for them, products are chosen on the basis of 'emotional' factors (see the right of Figure) such as sourcing and production process. In the middle are values common to both: taste, availability and appearance. This model raises as many questions as it resolves but does suggest scope for future research.

INSERT FIGURE 1 ABOUT HERE

Figure 1. The IGD model of product choice: Functional and Emotional Cues

What is the policy response to this complexity?

One possibility is that movements championing ethical food will remain within their respective single issue domains. The implied future would be one of business-as-usual consolidation, a slow, incremental but fragmented food ethics. Another possibility is that pressure will build up on supply chains, the state and consumers alike for a paradigm shift in which single issues are pooled. Climate change is frequently cited as a possible trigger for food system redesign. WWF the international NGO is working on the implication of a 'one planet diet', arguing that 20th century food systems have brought great choice to the developed world but by mining the environment in unsustainable ways. Such logic suggests the creation of 'omni-standards', a pooling of currently separate criteria by which food is judged, a summative system of value codification. That case was made in 2008 by the UK's Sustainable Development Commission.(Sustainable Development Commission 2008) The argument for omni-standards is that whereas supermarketisation offers consumers different ethical positions in separate consumption or product 'boxes', a truly sustainable food system would require all foods to be improved against all criteria, hence the term 'omni' standards. Trading off discrete values is not just divisive but inappropriate.

For Korthals and others, the key issue is to highlight ethical dilemmas for consumers. Some dilemmas are overt; others hidden. This is the world where a consumer wanting to buy filter coffee, for example, ponders over which product to buy: fair trade coffee or bird-friendly coffee or organic coffee, etc? Why not all? In fact, such ethical dilemmas – within broadly ethical food choices – are common. The present author conducted an illustrative thought experiment for a seminar with the Co-operative Group in the UK to see how easily he could purchase some everyday food items while pursuing 'values for money' (see Table 1). This applied a simple matrix of values to chocolate, tea, coffee, fruit juice, fish, milk and bread, all items with significant market presence by brands claiming ethical attributes. Each of these values has a rich and evidence-based foundation, albeit diverse interpretation. Were they fairly traded?(Fairtrade Foundation 2009) Covered by the Ethical Trade Initiative (in support of decent labour conditions)?(ETI 2009) Was other than mandatory consumer information provided and avoiding hyperbole or 'greenwash' and its nutritional equivalents?(Hawkes 2007, Lang et al. 2006) Was there an organic option?(Defra 2008) Was it good for human health?(Food Standards Agency 2008) Could it be locally sourced and from local ingredients (to support local food systems)?(IIED 2004) Was there a waste reduction possibility (e.g. could the package or residue be recycled or otherwise harm reduced)?(WRAP 2008)

The difficulty of getting a product to which all answers could be 'yes' is shown. Some are intrinsically impossible. Chocolate, for instance, is sugar, fat and cocoa solids, not major ingredients for health (other than pleasure). Nor can one purchase a wholly locally sourced chocolate in the UK; some might be processed there but not grown there. One could buy a fairly-traded fruit juice which would be 'healthy' but its packet was not re-usable or recyclable. Fair trade juice is good for farm labour and health (if imbibed once per day) but less certainly sound in relation to localism and food miles; indeed, the fair versus food miles debate is not necessarily a good indicator of carbon or greenhouse gas emissions.(Smith et al. 2005) Seasonality might be a better indicator for greenhouse gas reduction. In short, the range and sub-divisions of consumer ethical food issues makes for a very complex matrix. The point of the exercise was not to be categorical but to highlight the difficulty in satisfactorily meeting a combination of perfectly reasonable aspirations.

INSERT TABLE 1 about here

Table 1. A matrix to illustrate the complexity of attempting to meet multiple values when food shopping: 'can I get 'values-for-money' when buying everyday foods?'

This approach warrants further scrutiny. The UK's Council of Food Policy Advisors has indicated that it wants some clarification of how to combine such features and how to identify "what a healthy sustainable diet is and how accessible and affordable is it?"(Council of Food Policy Advisors 2009) The Sustainable Development Commission is conducting work for the UK government to scope what such a diet might be. By implication, this would send different signals to production, and is why and how ethical food might contribute to the transformation of land use. The notion of sustainable diet might incorporate key attributes of ethical food. Table 2 outlines five groups of values: quality, social justice, environment, health and social determinants. Each of these has strong and well articulated bodies of evidence. The table illustrates, too, whether there is a plausible standard or feature for each standard or criterion; whether there is an indicator or proxy; whether this receives some support or agreement; and whether there is a body or organisation either working on that standard, championing it or in negotiation.

INSERT TABLE 2 ABOUT HERE

Table 2. Some ‘omni-standards’ or criteria by which a sustainable / ethical food system might be judged

A potential criticism of this approach is that it tacitly places responsibility on consumers to choose not just wisely but sophisticatedly, when they are already burden by impossible choices and trade-offs with economic circumstance. Sustain, the UK alliance of 120 NGOs, has recognised the need for coalescence of standards and has designed a number of potential label schemes incorporating different values, using a ‘red’, ‘green’ and ‘amber’ traffic lights coding pioneered for nutrition.(Sustain 2008) The appetite for resolving omni-standards by labelling is not strong politically. A stronger case is to ‘choice-edit’.(National Consumer Council and Sustainable Development Commission 2006, Sustainable Development Commission 2008) This term refers to the use of product and process specifications to frame consumer choice by introducing tougher standards, before the consumer selects between items. In effect, this is using conventional business practice for socially and environmentally benign ends. Whereas a food policy designed around separate ethical boxes puts the onus on individual consumers to choose wisely, omni-standards imply a policy focus upstream and on choice editing by product managers. One puts the moment of ethical decision at the shelf. The other puts it before the product takes shelf space. The implication is that civil society organisations might have to adopt different strategies; ethical food needs to be championed upstream to go mainstream.

The UK offers intriguing possible futures. The four largest retailers (Tesco, Sainsbury, Asda, Morrisons) offer ethical food as niches on crowded shelves, while another group with around 12% of market share are championing a 'values for money' approach, stipulating company-wide, multi-factor ethical positions: the Co-operative Group in 1996.(Co-operative Wholesale Society 1996), Marks and Spencer in 2007 (with its Plan A),(Marks & Spencer plc 2009) and Waitrose the supermarket member of worker-owned John Lewis partnership incrementally since the late 1990s.(Waitrose 2009) In 2009, the Co-operative Group purchased Somerfield, another top ten UK food retailer, and has indicated that too will be brought in line with the Responsible Retailing commitments.

Might omni-standards enter policy?

This paper has outlined a tension between the post World War 2 policy emphasis on delivering consumer 'value-for-money' (in the name of cheapness) and the new constellation of 'values-for-money' in the name of sustainability. Ethical food puts a complex set of propositions to consumers and to retailers, the gate-keepers of European food systems. With pressures on margins at the best of times, it would not be surprising in uncertain economic times if there were signs of a 'retreat to brand' among manufacturers and retailers, or wholesale shedding of single issue ethic niche. Sceptics about ethical foods have anticipated dramatic fall off in consumer support but this has not so far happened in Europe.

Crises could take the food system in different directions. In the mid 19th century exposés of adulterated food was staunchly rebutted by industry proponents; the conflict lasted for decades with public health proponents winning tougher food laws and improved standards.(Paulus 1974, Wilson 2008) The demand for unadulterated food, affordability and with decent values was also a trigger for the early co-operative movement which built a non-profit food business model around social values.(Redfern 1913, 1920) In the 21st century it is not impossible that ethical demands could again generate business model change from farm to shop. Once more, it is being learned how neither standards nor certification – the main vehicles for guaranteeing ethical brand value - are on their own sufficient to deliver continual ethical value improvement. The organic, animal welfare and fair-trade movements, for instance, have each pursued the certification and standards auditing route into mainstream food business; but they are also aware of the need to preserve their identity as social movements, not least since their members become both consumers and champions for change.

The analysis of ethical food presented here reinforces the analysis of the food system as split into a dual governance structure – part state, part commercial given by previous writers.(Barling &Lang 2003, Bonanno et al. 1994, Burch &Lawrence 2005, Pritchard &Burch 2003) But it also stresses the role of civil society bodies as key players in contesting and shaping food policy. Civil society organisations have been dynamic champions of systems of regulation and controls; they have concluded many bi-lateral deals with corporate bodies. Sometimes too, corporations have created NGOs as independent bodies rather than turn to the state to consolidate certification. The Marine

Stewardship Council for instance was created by Unilever to address sustainability of fishing. GlobalGAP is an international industry-led system of standards ('GAP' stood for good agricultural practice) first created in the late 1980s to set agrichemical residue stanards but not covering entire chains.(GlobalGAP 2008) The Sustainable Agriculture Initiative is a more recent multinational food company-led attempt to forge industry-led sustainability standards.(SAI 2008). Both fair-trade and organics began as private standards, certified by civil society bodies. Unlike fair-trade which is still an array of bilateral agreements between food companies and civil society, the organic market has been brought under state guidance at national and EU levels to regularise diverse sets of standards which confused consumers.(Defra 2008)

This diverse pattern of relationships and roles for state systems of food governance is evolving.(Oosterveer 2007) Tough state involvement generally emerged across Europe from the mid 19th century to protect public health.(Lang 2006, Paulus 1974, Porter 1998) From the 1970s and 80s, the role of state as controller was contested by neo-liberals.(Cockett 1994) Others have documented how company-led supply chain specifications and contracts privatised and changed the state role.(Coff et al. 2008) What has now emerged - incompletely, it is clear – is a third element to the complexity of modern systems: civil society-led standards and values which place demands on supply chains. Ethical demands have illustrated this shift as single issue NGOs have begun to negotiate their own standards for markets, sometimes with patchy state support, sometimes without. Animal welfare, organics, bird life, fair trade, health have been subject to tough negotiations and commercial deals between NGOs and gate-keepers of food supply chains and at EU level; particular success has been achieved as protectors of the environment.

Conclusion

A number of interesting questions for both researchers and policy-makers arise. Firstly, how might this new tripartite (state, supply chain, civil society) contest over food ethics alter land use? Secondly, might 'ethics' now lead to a re-configuration of wider food and farm policy, as Mrs Fischer Boel's 2006 speech signalled? Thirdly, are there any pan-European patterns in how food ethics are being responded to? Fourthly, how are EU and national institutions responding to ethical demands? And finally, are the diverse state bodies which (partially) address the variety of issues indicated in Table 2 engaging with each other to help define a sustainable diet for the 21st century? Consumers face competing demands if they aspire to eat well. At the other end of the food chain, farmers face equally competing signals: to put their land down to biodiversity and also to mass produce food for coming times of scarcity. No National, EU or global institution yet deals with all issues raised by ethical consumerism. Even progressive Nordic Food Policy Councils do not yet cover all features or factors, although they are arguably furthest developed in conceiving of their relevance.(Lang et al. 2005)

Far from being simple, the notion of ethical food raises complex questions for policy, business, the state and consumers. The term covers many values but a core element is that food delivery could be shaped by broader social goals than the conventional goals of price, convenience and safety. That said, it is by no means clear whether food markets are yet being comprehensively reshaped towards ‘values-for-money’ even though some business models champion that have already emerged. The new fundamentals of water, oil, climate, etc might generate paradigm shift, creating more policy space for a more ethically driven food system. The unease that surfaced in global politics about food security in 2005-08 was a reminder how the food system is already under value pressure.

These systemic threats have been muted at the European level. This is partly because the EU has been defensive about CAP’s highly subsidised impact on environment and world trade. The Single Market was also adopted with a notional acknowledgment to neo-liberal trade facilitation and information flow to consumers. EU policy will undoubtedly come under renewed pressure to reform but whether this is further to liberalise or address sustainability or ethics is presently unclear. Ethical food demands are likely to be part of this emerging discourse but whether food ethics and ethical foods survive the transformation and process of structural change that beckons in their present form remains to be seen.

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