



Sector Futures

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Sector Futures is available in electronic format only.

This third article discusses the future of Europe's food and drink manufacturing sector, exploring policy issues that arise from an examination of trends, drivers and scenarios. It follows two earlier bulletins: 'The future of the food and drink sector', which examined trends and drivers of change; and 'Europe's food sector at a crossroads', which considered scenarios for the future. The landscape for Europe's food policies for the future will be shaped by the debate on diet, nutrition and health.

In exploring the trends, drivers and scenarios, it quickly became apparent that the food and drink manufacturing sector is an integral part of a larger food system, and cannot be considered in isolation. Clearly, any policy discussion regarding food and drink manufacturing has to take place within the broader context of food policy as a whole. Moreover, since the food policy agenda is increasingly linked to health policy, it is of critical importance to consider the future of Europe's food and drink manufacturing sector from this perspective.

Examining the trends and drivers of change has clearly shown that the food system, not just in Europe, has experienced significant change since the Second World War. Technological innovation, industrialisation, urbanisation, globalisation, and social and demographic change are just some of the factors that are dramatically altering the way Europe's food is produced, distributed and consumed. It is also clear that these factors will continue to drive change in the future.

Food policy – old and new

In many ways, the performance of Europe's food system over the past 50 years has been a considerable success story – today there is a plentiful supply of food, hunger and malnutrition scarcely exist, and consumers enjoy a wide variety of choice at reasonable prices. After the Second World War, the priority was to ensure an adequate supply of basic foodstuffs, and central to this was the economic support of farmers. This policy, largely implemented through the **Common Agricultural Policy**¹ (CAP), has succeeded in meeting its key objectives. New concerns are now emerging, however, and food policies must adapt to the future. As the previous articles already identified, these concerns include the rise in chronic dietary diseases – such as obesity, heart disease and diabetes – and food safety issues.

According to Maxwell and Slater:

Urbanisation, industrialisation and globalisation mean that the food system can no longer be viewed simply as a way of moving basic staples from farm to (local) plate. Food is increasingly produced by commercial growers, feeding long and sophisticated supply chains, and marketing often processed and branded products to mainly urban consumers.

(**Overseas Development Institute**², 2003, p. 1)

Maxwell and Slater provide a useful summary of the main features of what they describe as 'food policy old and new' (see Table 1). Their focus is global rather than European, demonstrating that the changes occurring in the food system are a worldwide phenomenon. Nevertheless, their analysis provides a helpful context for a discussion of future European food policy.

¹ http://europa.eu.int/comm/publications/archives/booklets/move/13/txt_en.htm

² http://www.odi.org.uk/publications/briefing/bp_nov03.pdf

Table 1: Food policy old and new

	Food policy old	Food policy new
Population	Mostly rural	Mostly urban
Rural jobs	Mostly agricultural	Mostly non-agricultural
Employment in the food sector	Mostly in food production and primary marketing	Mostly in food manufacturing and retail
Actors in food marketing	Grain traders	Food companies
Supply chains	Short – small number of food miles	Long – large number of food miles
Typical food preparation	Mostly food cooked at home	High proportion of pre-prepared meals, food eaten out
Typical food	Basic staples, unbranded	Processed food, branded products; more animal products in the diet
Packaging	Low	High
Purchased food brought in	Local stalls or shops, open markets	Supermarkets
Food safety issues	Pesticide poisoning of field workers; Toxins associated with poor storage	Pesticide residues in food; adulteration; biosafety issues in processed foods (salmonella, listeriosis)
Nutrition problems	Under-nutrition	Chronic dietary diseases (obesity, heart disease, diabetes)
Nutrient issues	Calories, micronutrients	Fat, sugar, salt
Food-insecure	'Peasants'	Urban and rural poor
Main sources of national food shocks	Poor rainfall and other production shocks	International price and other trade problems
Main sources of household food shocks	Poor rainfall and other production shocks	Income shocks causing food poverty
Remedies for household food shortage	Safety nets, food-based relief	Social protection, income transfers
Fora for food policy	Ministries of agriculture, relief/rehabilitation, health	Ministries of trade and industry, consumer affairs, finance; food activist groups, NGOs
Focus of food policy	Agricultural technology, parastatal reform, supplementary feeding, food for work	Competition and rent-seeking in the value chain, industrial structure in the retail sector, futures markets, waste management, advertising, health education, food safety
Key international institutions	FAO ² , WFP, UNICEF ⁴ , WHO ⁶ , CGIAR ¹	FAO ² , UNIDO ⁵ , ILO ³ , WHO ⁶ , WTO ⁷

Notes: ¹ CGIAR = Consultative Group on International Agricultural Research; ² FAO = Food and Agriculture Organisation of the United Nations; ³ ILO = International Labour Organisation; ⁴ UNICEF = United Nations Children's Fund; ⁵ UNIDO = United Nations Industrial Development Organisation; ⁶ WHO = World Health Organisation; ⁷ WTO = World Trade Organisation.

Source: *Overseas Development Institute, 2003, p. 1*

This reading of the food policy landscape is consistent with Lang and Heasman's (2004a, 2004b) characterisation of current and future paradigms for the food sector, described in the second feature, **Europe's food and drink sector at a crossroads**³. The policies of the past were constructed within a 'productionist paradigm', where the problems were seen

³ <http://www.emcc.euroworld.eu.int/publications/2004/ef04112en.pdf>

as insufficiency and hunger, and the solution was improved productivity in agriculture. Lang and Heasman contend that current policies are aimed at addressing a problem that no longer exists:

Policy frameworks are locked in a paradigm (way of thinking) that may have made sense in an earlier era but no longer entirely do today. Insufficiency, hunger and productive inefficiency have infused and reinforced the 20th century pursuit of increased output and quantity over quality.

(Lang and Heasman, 2004a, p. 64)

Indeed, some of the issues that are now seen as concerns for the future are a direct consequence of the productionist paradigm and the policies that were developed and implemented as a result.

Dimensions of future policy debate

Accepting the basic assertion that current policies do not address future policy concerns, what then should be the dimensions of the future policy debate? Following the analysis in this series, future policies need to be reformulated to address a number of issues, primarily:

- diet, nutrition and health;
- food safety;
- environmental and sustainability issues;
- markets and competition.

Transition to healthier diets

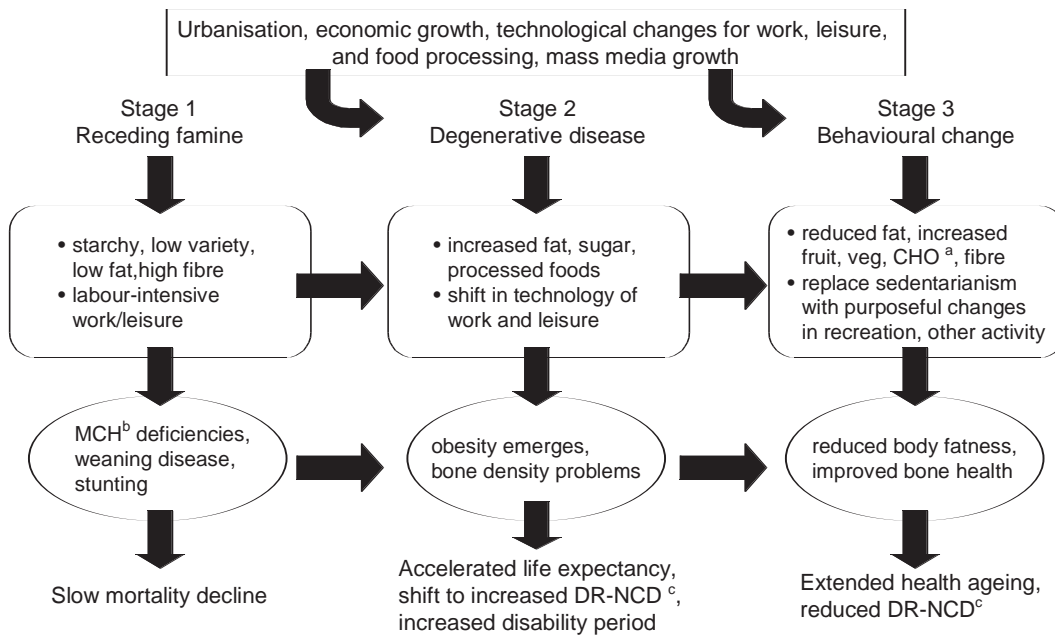
According to Lang and Heasman (2004a, 2004b), we are in the middle of a war over the future of food, and health is the key battle front. In their view, diet, nutrition and health need to be placed at the heart of food policy in the future. Key to such a shift is the reform of the CAP, which perpetuates the productionist paradigm of the past. This is discussed in more detail in sections below, covering the environment and sustainability, and markets and competition.

There is mounting evidence that changes in the food economy are rapidly bringing about dramatic changes in diet, not just in Europe (Eurodiet, 2002, p. 1) but across the world (WHO/FAO, 2003). Moreover, according to Popkin (2002), we are experiencing a '**nutrition transition**'⁴ (see Figure 1) that is contributing to the acceleration in non-communicable diseases. Having conquered famine within its boundaries, Europe is now experiencing an increase in diseases such as obesity, coronary heart disease and diabetes. This is the result of diets high in total fat, cholesterol, sugar and other refined carbohydrates and low in polyunsaturated fatty acids and fibre, in addition to increasingly sedentary lifestyles.

However, there is reason to be hopeful since Popkin sees evidence of a new dietary pattern emerging, which is evidently associated with the desire to prevent or delay degenerative diseases and to prolong health. In this next stage of the nutrition transition, diets are lower in fat, higher in fruit, vegetables, carbohydrates and fibre, and the population engages in more physical activity. Critically, Popkin highlights the fact that behavioural change is the key to the next stage of the nutrition transition.

⁴ <http://www.cpc.unc.edu/nutrans/whatis.html>

Figure 1: Stages in the nutrition transition



Notes: ^a Carbohydrate; ^b Mother and child health; ^c Diet related non-communicable diseases.

Source: Adapted from Popkin, 2002

There is now considerable scientific consensus about what constitutes a healthy diet and lifestyle. **The Eurodiet report**⁵ (2002, p. 3), for instance, outlines population goals for nutrients and lifestyle features, consistent with the prevention of major public health problems in Europe. These goals cover, for example, physical activity levels, body mass index, percentage of dietary fat, carbohydrate, sugar, fruit and vegetables, dietary fibre and salt (see Table 2).

However, the political will to implement these kinds of objectives in a concerted way across Europe is currently lacking. In the **White Paper on Food Safety**⁶, adopted in January 2000, the Commission announced that it would develop a proposal for Council recommendations on European dietary guidelines. However, this initiative is currently on hold, apparently because: 'the establishment of such guidelines would require a level of scientific consensus in Europe, which is at present not yet achieved'.⁷

⁵ http://europa.eu.int/comm/health/ph_determinants/life_style/nutrition/report01_en.pdf

⁶ http://europa.eu.int/comm/dgs/health_consumer/library/pub/pub06_en.pdf

⁷ See European Commission's web page on nutrition policy, at http://europa.eu.int/comm/health/ph_determinants/life_style/nutrition/nutrition_policy_en.htm

Table 2: Population goals for nutrients and features of lifestyle, consistent with the prevention of major public health problems in Europe

Component	Population goals	Levels of evidence
Physical activity levels (PAL)	PAL > 1.75	++
Adult body weight as BMI	BMI 21-22	++
Dietary fat % E	<303	++
Fatty acids % total E		
Saturated	< 10	++++
Trans	<2	++
Polyunsaturated (PUFA)	4-8	+++
n-6	2g linolenic + 200mg very long chain	++
n-3		
Carbohydrates total % E	>55	+++
Sugary food consumption, occasions per day	=< 4	++
Fruit and vegetables (g.d-1)	>400	++
Folate from food (mg.d-1)	>400	+++
Dietary fibre (g.d-1)	>25 (or 3g/MJ)	++
Sodium (expressed as sodium chloride) (g.d-1)	<6	+++
Iodine (mg/d)	150 (infants - 50) (pregnancy - 200)	+++
Exclusive breast feeding	About 6 months	+++

Source: Adapted from Eurodiet, 2002, Table 1

The European Union (EU) is faced with the problem that Eurodiet targets are likely to be much more difficult to achieve for some Member States than others. This makes common action across Europe very difficult. A second obstacle is the attitudes of different Member States regarding the extent to which governments should intervene when it comes to what people eat. In the past, governments have typically restricted themselves to guidance on diet and other public health issues, through promoting health education. Without doubt, health education will be given much higher priority in the future.

Beyond that, a more interventionist approach raises considerable difficulties, since governments are sensitive about being accused of running a 'nanny state'. Politicians tend to say that, once information is provided on diet and health, it is up to individuals to make their own choices.

Nevertheless, there are growing signs that some Member States are putting public health, in general, and diet and nutrition, in particular, much higher on the policy agenda. This is particularly noticeable with the introduction of smoking restrictions in public places. Attitudes in some progressive countries (e.g. the US and Australia) have tipped in favour of banning smoking in public places, and some European Member States (e.g. Estonia, Finland, Ireland, Slovenia and Sweden) have followed this trend. This marks a significant shift in government attitudes towards intervention in public health – a trend that is likely to continue and which is also likely to extend to diet and health.

For example, the UK Department of Health has just released a far-reaching White Paper on **Choosing health: Making healthy choices easier**⁸, which states that:

This White Paper is the start, not the end of a journey. We will continue to develop ideas and action, learning from experience to help people choose health in the twenty-first century. It is the next step in our journey towards engaging everyone in choosing health and tackling health inequalities. It is the beginning of a journey to build health into Government policy and ensure that health is everybody's business.

(Department of Health, p. 19)

Specifically, in relation to diet and health, the White Paper makes several recommendations for UK policy development:

- By mid 2005, processed foods will be clearly labelled to indicate the fat, sugar and salt content for shoppers, using a 'traffic light' system (e.g. red light for foods that are high in sugar, fat or salt).
- The way in which foods are advertised to children will be investigated, with a view to voluntary restrictions, or possibly legislation, on 'junk food' adverts.
- An independent task force will be established to look at the best ways to prevent and treat obesity.
- Emphasis will be placed on the role of schools in providing healthier meals and free fruit and in encouraging sporting activities, both within and outside of school hours.
- Children will be encouraged to cycle to school and adults to get active at work.
- More than £1 billion will be invested in physical education and school sport, while more sports specialist academies will be developed, and the protection for school playing fields will be strengthened.
- In addition, a new service called 'Health Direct' will be set up to provide clear information on health choices by telephone, or via online, digital television and information services. The National Health Service will employ trainers to provide advice to individuals on how to improve their lifestyle, and everyone will be given the opportunity to develop a personalised health guide.

These measures signify a substantial shift in public policy, even though they fall short of some of the more drastic ideas described in the previous article (e.g. modifying consumption of 'unhealthy' foods through taxation, or providing incentives to general medical practitioners by rewarding them for the health performance of their patients).

Clearly, individual Member States are at different stages regarding the nutrition transition and in relation to their awareness of the relationship between diet and health. A recent **survey**⁹ by the **Confederation of the Food and Drink Industries of the EU (CIAA)**¹⁰ found that Europeans are still not sufficiently aware of the risks to their health, caused

⁸ http://www.dh.gov.uk/PublicationsAndStatistics/Publications/PublicationsPolicyAndGuidance/PublicationsPolicyAndGuidanceArticle/fs/en?CONTENT_ID=4094550&chk=aN5Cor

⁹ http://www.ciaa.be/uk/Documents/press/congress2004_consumersurvey_en.pdf

¹⁰ <http://www.ciaa.be/>

by unhealthy lifestyles and diets. Significantly, the survey found that awareness of health risks, linked to unbalanced diets and unhealthy lifestyles, was considerably higher in Great Britain than in the other countries:

15% of the British consider being overweight as the greatest risk (the highest score) against 6% for the French (the lowest score). Similarly, the British are almost twice as likely as those in the other European countries surveyed to consider not following an active lifestyle as a major health risk.

(CIAA, 2004)

Thus, concerted action across the EU seems unlikely in the short term; however, acceptance of the relationship between diet and health can be expected to grow over time. Meanwhile, the European Commission is rethinking its approach; for example, in July 2004 David Byrne, Commissioner for Health and Consumer Protection, launched a '**reflection process for a new EU health strategy**'¹¹. It seems that it is only a matter of time before these generally accepted ideas are adopted and policies, similar to those described in the UK's White Paper, are embraced by the EU and by individual Member States.

The food industry, of course, realises that it has to respond positively; it cannot be seen to be arguing against healthy diets and lifestyles. Naturally, it favours the adoption of voluntary codes of practice, rather than being restricted by legislation, for instance, on issues relating to labelling and advertising. A summary of the industry's current approach is outlined in the CIAA pamphlet, **Food and drink industry initiatives on diet, physical activity and health**¹². Nevertheless, in the longer term, it is likely that EU governments will legislate to improve diet and health.

Food safety issues

Whatever scenario emerges, ensuring the safety of food and feed is a major priority. The high profile food scares in the 1990s – BSE, dioxins, foot and mouth disease, etc – placed food safety much higher on the agenda for all EU Member States. Consequently, initiatives have been implemented at national and EU levels.

European and national legislation

The *White Paper on food safety* (European Commission, 2000) established the general principles of European food regulation and led to the adoption of **regulation on food law**¹³ in 2002, in addition to the foundation of the **European Food Safety Agency**¹⁴ (EFSA) in the same year. Now, for the first time, Europe has an integrated approach, with legislation in force, covering a wide range of food safety issues, including: measures on transmissible spongiform encephalopathies (TSEs), animal by-products, labelling of feed, undesirable substances in feed, pesticides, food supplements and antibiotics. Future actions are also planned, including measures relating to: food additives, flavourings in foodstuffs, microbiological criteria for certain foods and dietetic foods.

One key aspect of this legislation is the enforcement of food and feed control systems. A rapid alert system for food and feed requires obligatory notification to the relevant national authority, the EFSA and the European Commission, of any direct or indirect risk to human health, animal health or to the environment. This builds upon the existing rapid alert

¹¹ http://europa.eu.int/comm/health/ph_overview/Documents/byrne_reflection_en.pdf

¹² <http://www.ciaacongress.be/Brochure.pdf>

¹³ <http://www.foodlaw.rdg.ac.uk/pdf/2002-food-regulation.pdf>

¹⁴ http://www.efsa.eu.int/index_en.html

system for food, extending it to include the feed sector, as well as food and feed imports from outside the EU. Accordingly, Member States will be required to carry out internal audits and to produce detailed plans of their control systems, while ensuring that they have contingency plans in place to address potential emergency situations. So far, most Member States have responded by establishing national legislation and dedicated national food safety authorities.¹⁵

The EU's food regulation also gives special powers to the European Commission. These powers allow it to take emergency measures, if it is clear that food or feed – whether from the EU or from a third country – poses a serious risk to human health, animal health or the environment, and if such a risk cannot be dealt with by a Member State. Such measures can be initiated by the Commission or requested by a Member State. They also allow the Commission to suspend the marketing or use of the food or feed in question.

Genetically modified foods

With regard to genetically modified (GM) foods, a high proportion of European consumers remain suspicious and would not purchase GM foods if given the choice. Legislation, which came into effect in May 2004, on **GM food and feed**¹⁶ means that any GM foods intended for sale in the EU are subject to a rigorous safety assessment, which is the responsibility of the EFSA. The rules also mean that any foods containing genetically modified organisms (GMOs), or ingredients produced from GMOs, must be clearly labelled. However, products produced using GM technology (for instance, cheese produced with GM enzymes), and products such as meat, milk and eggs from animals fed on GM animal feed, do not have to be labelled. Similarly, small amounts of GM ingredients that are accidentally present in a food do not need to be labelled: below 0.9% for approved GM varieties and 0.5% for unapproved GM varieties that have received a favourable assessment from a European Commission scientific committee.

Although Europe's food industry has taken on board consumer opinions on GM food, it is concerned about the difficulties involved in implementing the legislation¹⁷:

The CIAA remains deeply concerned by the practical difficulties the implementation of this legislation will create for operators and for enforcement authorities. In the absence of DNA/modified protein in the final product, the implementation of the new rules will have to be based on paper trails and not on analytical tests, as is currently the case. The CIAA fears that this system will lead to unfair competition and fraud, while causing major confusion for consumers.

(CIAA, July 2003)

The CIAA continues to believe that the labelling rules are impracticable, as well as unenforceable, and that the labelling system should have been based on detectability. Over the next few years, it will become evident whether the EU rules are workable and whether adjustment is necessary.

¹⁵ For a list, see <http://www.food.gov.uk/aboutus/agencyineurope/eufsanations>

¹⁶ http://europa.eu.int/eur-lex/pri/en/oj/dat/2003/l_268/l_26820031018en00010023.pdf

¹⁷ See CIAA Press Release, 'GMOs: Practical difficulties linked to implementation of the new labelling requirements need to be taken into consideration', 23 July 2003, available at <http://www.ciaa.be/uk/documents/press/press23-07-03.htm>

Environment and sustainable development

Reform of the CAP

CAP reform is fundamental to a more environmentally friendly and sustainable food system in Europe. The CAP has been geared towards increased productivity, but it is increasingly clear that this will not support future objectives in terms of diet and health, or sustainable development. Minor reform has taken place over the years but, until recently, the farming lobby was able to stifle fundamental change.

However, the climate is now very different. This is partly due to food crises in recent years, the general view being that agricultural practices, supported by the CAP, either caused or exacerbated the problems. Nevertheless, the major driver of change was the budgetary consequences of EU enlargement and extension of the CAP to the new Member States. With 10 new Member States in 2004 (and Bulgaria and Romania expected to join in 2007), Europe's agricultural labour force and arable area has roughly doubled. The extension of the CAP to the new Member States would have increased the budgetary burden of the CAP to an unsustainable level. High price support aid to the new Member States would have stimulated output, while high food prices would have reduced consumption.

Thus, in June 2003, EU farm ministers adopted fundamental reform of the CAP, the key elements of which are:¹⁸

- a single farm payment for EU farmers, independent from production, although in some cases the link will be maintained, to avoid abandonment of production;
- payment linked to environmental, food safety, animal and plant health, and animal welfare standards. Farmland must be kept in 'good agricultural and environmental condition';
- a rural development policy, which will be strengthened with new measures to promote the environment, quality and animal welfare, and to help farmers to meet EU production standards;
- direct payments for bigger farms, which will be reduced to finance the new rural development policy.

These changes signal a radical alignment of agricultural policy, balancing concerns about security of food supplies with the environment.

Green procurement

In the EU, public procurement amounts to over €1,000 billion every year, a substantial proportion of which is food related. However, public authorities have been stifled by EU public procurement policies in their attempts to support environmentally friendly policies, for instance, in support of locally grown or organic food. To allow for environmental and social criteria to be considered in awarding contracts, **new public procurement directives**¹⁹ came into effect in April 2004. Member States now have until 31 January 2006 to transpose the directives into national law.

¹⁸ See European Commission website on 'CAP reform – a long-term perspective for sustainable agriculture', http://europa.eu.int/comm/agriculture/capreform/index_en.htm

¹⁹ http://europa.eu.int/eur-lex/pri/en/oj/dat/2004/l_134/l_13420040430en01140240.pdf

The basic principle of the directives remains the same, in that public contracts should be awarded to the most economically advantageous tender. However, public authorities may now apply environmental and social criteria when awarding contracts, as long as this is done in a transparent way and in line with the relevant case-law of the Court of Justice.

Nevertheless, environmental groups have argued that this 'greening' of public procurement legislation does not go far enough. Further improvements, they contend, would mean allowing:

- the total environmental impact of procurement to be considered, including the process and production methods involved;
- external environmental costs and full life-cycle assessments to be taken into account, in calculating the cost of the tender;
- the tender to be awarded to 'the most advantageous offer', not 'the economically most advantageous tender, for the contracting authorities'.

The new directives will help public authorities to pursue greener food policies but, if their impact is limited, further reform, along the lines described above, may well be seen.

Market and competition issues

Liberalisation of agricultural trade

Food policy has long recognised the need to support farmers and, in Europe, this subsidy has been delivered by the CAP. Of course, subsidies distort the market and negotiations have been underway within the World Trade Organisation (WTO), for many years, to liberalise agricultural trade and restrict subsidies. The EU is broadly in favour of such moves, as long as its trading partners also agree to reduce farm support and export subsidies, such as export credits in the US. Thus, in last year's reforms, revisions were made to the CAP market policy. These included price cuts in the milk sector and reforms in the cereals, rice, durum wheat, nuts, starch potatoes and dried fodder sectors. Although current negotiations within the WTO (**the Doha Development Agenda**²⁰) have been difficult, in July 2004 governments agreed in principle to abolish all forms of agricultural export subsidies, and to reduce substantially trade-distorting domestic support in agriculture.²¹

Market concentration

As the first article outlined, increasing market concentration in input supply, processing, manufacturing and retailing is a global phenomenon. The issues for Europe are two-fold: firstly, there is the traditional concern of whether such concentration of market power leads to uncompetitiveness; and secondly, there is the issue of whether such concentration hinders the pursuit of objectives regarding diet and health.

²⁰ http://www.wto.org/english/tratop_e/dda_e/dda_e.htm

²¹ See WTO, 'Round-the-clock meetings produce "historic" breakthrough', http://www.wto.org/english/news_e/news04_e/dda_package_sum_31july04_e.htm

Concentration in itself does not necessarily imply uncompetitiveness. Indeed, such investigations, undertaken by competition authorities, have generally found the food industry to be broadly competitive. For instance, although the UK's Competition Commission investigation into supermarket retailing found some evidence of abuse of market power – concerning the pricing of groceries and their relationships with suppliers – the investigation also showed that food was becoming cheaper in real terms (Competition Commission, 2000).

Even so, concerns still exist about the concentration of power along increasingly global food supply chains and the effect this has on the ability of individual states to regulate cross border activities. It will be increasingly important, therefore, for the market to be monitored at European level.

Perhaps more fundamentally, Lang suggests that, unless we address the issue of market concentration through competition policy:

One cannot understand policy in areas such as the following:

- *the environmental case for internalising cost externalities rather than continuing to pursue cheap food policies;*
- *localisation vs. globalisation in trade policy;*
- *the social injustice of low/squeezed earnings of primary commodity producers in developing countries;*
- *the civic/amenity implications of location/siting of shops and transport reduction;*
- *the price signals of 'unhealthy' vs. 'healthy' foods and their impact on social marketing initiatives and health education.*

(Lang, 2003, p. 3)

Conclusion

Europe's food sector is undergoing dramatic change; in particular, future policies will be increasingly geared towards preventing non-communicable diseases, resulting from poor diet, while ensuring the safety of food and feed. This will require a radical shift, away from the productionist paradigm of the past, with future emphasis being placed on the impact of food on health and on the environment. Although it is already aware of the change in direction, the food manufacturing sector will, nevertheless, have to be a willing partner in this transition.

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²² All links accessed on 21 December 2004.

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