BIRMINGHAM FOOD COUNCIL

food & the city economy

AN INTERIM REPORT

DISCUSSION DOCUMENT

December 2014

The following report pulls together key statistics to build a picture of the importance of food to the Birmingham economy and society, and explores to what extent food features in local decision making. I'm grateful to Nick Hughes for researching and writing this report, and for discussing with me the issues around its findings.

A useful next step would be to explore some of the tensions that exist over the economic role food plays in the city, and what the nature is of the opportunities we have in resolving some of these tensions for the benefit of all our citizens and the wider society.

Food is a diverse sector that is important, if not integral, to the economic fortunes of the city. In addition, several major niche players in the UK food sector are here, founded only over the last 25 years, business activity largely unnoticed until very recently by many people.

The importance of food, however, cannot simply be measured in monetary terms. The social significance of food and how it is produced, distributed and consumed cannot be overstated, neither indeed can the longer-term economic impact of decision-making on these matters of social significance.

There are clear tensions between the political desire to attract investment to the local food industry through initiatives such as the Food Hub zone and to support local businesses *and* the health and social issues caused by obesity and increasing levels of food poverty *and* poor enforcement of food standards in Birmingham.

We were struck by some of these tensions and their associated issues. For example:

- Manufacturers, distributors and sellers of sugar-based products, confectionary and beverages employ many people, but their impact on the unhealthy diets of many of our citizens — indeed the global population[1] — pose ethical problems for socio-political decision-making. An example of this recently in Birmingham is the debate about the use of funds from the marketing divisions of Kellogg's and of Coca Cola this summer.[2]
- Fast food retailers are attractive to landlords of vacant premises, yet Birmingham Public Health has sought and gained changes in planning permission to prevent more of these outlets in some neighbourhoods.
- Birmingham offered its services to the Elliott Review Team to tackle food crime nationally, notably in the offer to host the UK hub for the proposed Food Crime Intelligence Unit. The city is an acknowledged centre for regulation authorities, yet in the particular context of the food sector, Birmingham City Labs has had no investment for several years and is no longer a UKAS Accredited Public Analyst Laboratory.
- Moreover, Birmingham's independently-owned food wholesalers, retailers and restaurants are an integral part of the city's food culture and part of the glue that binds local society, but if, as it appears, standards of food safety and hygiene are slipping, can politicians afford *not* to invest in testing and enforcement capabilities?
- The proposed Food Hub zone could bring huge economic benefits to a deprived area of the city but should the Council seek to attract big corporations paying the minimum wage or would the establishment of a hub of entrepreneurial SMEs and healthy food providers, led by example with the relocation of the Wholesale Markets, bring more long-term benefits to the city, as well as to the immediate neighbourhood?
- Indeed, what *kind* of food produce and products should be associated with this Food Hub zone and therefore with Birmingham?

Kate Cooper

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1 For up-to-date information on such matters, see the Rudd Centre for Food Policy & Obesity: http://www.yaleruddcenter.org/

Introduction to the information in this report

Food is of huge importance to Birmingham and its economy. The city's inhabitants spend over £3bn every year on food and drink and the sector employs many thousands of people at every stage of the supply chain from food production and manufacturing through to retailing, wholesaling and foodservice.

Food is also at the heart of many of the city's social issues. Birmingham under-performs on key food enforcement measures; obesity rates in both adults and children are higher than the national average while food poverty is an emerging issue with food banks proliferating throughout the city.

Assessing the importance of food to Birmingham, however, is not without its challenges. Data that is publicly available is often inconsistent in its sectoral and geographical categorisation. Some ONS datasets do not break down manufacturing into sub-sectors while foodservice is often categorised along with accommodation and transport. Comparing data by geography can also be challenging as some ONS data sets include Birmingham within the broader West Midlands category while others break the data down into the area defined as the Birmingham Local Authority. However, so long as we accept the imperfections in the data, by pooling the information available we can build a useful picture of the importance of food to Birmingham.

Birmingham has a great food heritage — particularly in its diversity of culinary influences — and is home to some iconic businesses. But from a dispassionate point of view the food industry is no more important to Birmingham than to other UK cities. Taking manufacturing as an example, people working in food, beverages and tobacco manufacturing account for 10.8% of the total employed in manufacturing in the city.[3] This is below the national average of 13.8% and well below the 20.4% employed in food manufacturing in Norwich – another city with a strong food tradition. In fact, it is high-tech manufacturing that dominates in Birmingham, accounting for 35.4% of manufacturing employment compared with a national average of 20.3%.

Where food's footprint is large is in foodservice, which, in relative terms, is of greater importance to the Birmingham economy than to the UK as a whole accounting for 6.3% of employment in the city compared with a UK average of 5.6%.

3 ONS Neighbourhood Statistics, Industry (2011)

Section 1: The context

1.1 Birmingham

With a population of almost 1.1M[4] Birmingham is the UK's second largest city by population. In addition 170,000 people commute into the city centre every day.

Birmingham's universities are home to 65,000 undergraduate students.

The age demographic of the Birmingham population is younger than the national average. 45.7% of Birmingham residents are under 30, compared with 36.8% for England. In contrast 12.9% of residents are over 65, compared with 16.9% nationally.[5]

Birmingham is a diverse city. Around 42% of residents are from an ethnic group other than white.

Birmingham has the largest concentration of businesses outside of London. The regional economy is worth £90bn a year and economic output is almost £20bn a year.[6]

Workplace based Gross Value Added (GVA) for the UK was £1,383bn in 2012.[7] Of this £98.3bn was attributable to the West Midlands and £21.2bn to Birmingham itself. This compares favourably with other major cities such as Liverpool (£9.1bn), Leeds (£18.8bn) and Bristol (£11.7bn).

UK Workplace based GVA per head was £21,674 in 2012. For Birmingham the figure was £19,523. This compares unfavourably with Liverpool (£21,272), Leeds (£24,770) and Bristol (£27,148).

1.2 The food industry

In 2013, total UK consumer spending on food, drink and catering services was £196bn.[8]

Of this, £84bn consumer expenditure was on catering services and £112bn household expenditure on food and drink.

The statistical breakdown for each sector of the food industry was as follows:

sector	gross value added (GVA)	number of businesses	number of employees
catering	£26.7bn	113,623	1,444,000
food & drink retailers	£27.3bn	52,774	1,158,000
food & drink wholesalers	£9.6bn	15,082	231,000

4 Birmingham City Council, Population in Birmingham (2014)

5 Birmingham City Council, Population in Birmingham (2014)

6 Birmingham City Council, Economic Zones, Investing in Birmingham (2012)

7 ONS Workplace Based GVA (2012)

8 Defra Food Statistics Pocketbook 2014 (2014)

Section 2: The importance of food to Birmingham's economy

2.1 Data for Birmingham Local Authority

2.1.1 Spend

By extrapolating the food stats 2013 data from Defra and assuming a UK population of 64M and a Birmingham population of 1.1M we can estimate:

- spending on food, drink and catering services per head in the UK is £3,063
- total spending on food, drink and catering services in Birmingham is ~£3.37bn

2.1.2 Consumption

The recommended GDA for the average calorie consumption for an adult is 2,000kcal/day; if everyone in the city followed this recommendation, the population of Birmingham would consume an average of 2.2bn kcal/day.

Other evidence indicates that the average UK consumption is closer to 3,500kcal/day, which suggests the city's consumption some 3.85bn kcal/day.[9]

2.1.3 Gross Value Added

In 2011, Gross Value Added (GVA) for distribution, transport, accommodation and food for Birmingham was £3.36bn.[10] This is in comparison with Leeds (£3.03bn), Liverpool (£1.84bn) and Bristol (£1.74bn).

GVA per sector for agriculture, forestry and fishing was £6M for Birmingham, compared with Liverpool (£6M), Leeds (£41M), and Bristol (£4M).

(*note:* ONS data does not breakdown GVA data for manufacturing into industry segments)

2.1.4 Employment

The number of people employed in the various food industry segments in 2011 was:[11]

segments	England (% of total in backets)	West Midlands	Birmingham
Manufacturing, Food, Beverages & Tobacoo	307, 520 (1.2%)	34,290 (1.4%)	4,230 (1%)
Wholesale & retail trade	4,007,570 (15.9%)	434,269 (17.1%)	66,500 (15.7%)
Accomodation & food service activities	1,399,931 (5.6%)	132,532 (5.2%)	26,715 (6.3%)

2.1.5 Gender divide (figures only available for accommodation & food service)

	England (% of total in backets)	West Midlands	Birmingham
Females aged 16-74	741,675 (6.3%)	73,601 (6.2%)	12,277 (6.2%)
Males aged 16-24	658,256 (4.9%)	58,931 (4.4%)	14,438 (6.4%)

9 See the ChartsBin visualisation of daily calorie consumption by country: http://chartsbin.com/view/1150

10 ONS Workplace Based GVA (2012)

11 ONS Neighbourhood Statistics, Industry (2011)

2.2 Data for the West Midlands

2.2.1 Business numbers

The number of West Midlands businesses involved in the following food and drink related business sectors in 2013 was:[12]

type of business	UK	West Midlands
manufacture of food products	8,205	620
manufacture of beverages	1,420	130
crop & animal production, hunting and related services	139,380	12,030
fishing and acqua culture	3,975	30
food & beverage service activities	147,260	11,285
TOTAL	**2,625,490**	**209,800**

2.3 Other data sources

2.3.1 Birmingham Economic Profile

In 2010, Birmingham City Council produced an economic profile[13] which provided an in-depth analysis of key issues affecting the local economy and labour market. As part of this analysis it produced a sectoral forecast for employment in Birmingham. For food-and-drink related industries the results were as follows:

Forecast Sectoral Employment in Birmingham - 2008 to 2020					
	2008	2010	2012	2016	2020
Agriculture & Mining	378	323	274	196	140
Food & Drink (Manufacturing)	4,281	3,789	3,607	3,275	2,930
Wholesale Distribution	30,148	26,691	26,811	26,814	26,610
Retailing	45,263	43,791	44,648	47,168	47,880
Hotels & Catering	34,947	31,735	31,957	32,682	32,896

2.3.2 Regional Observatory Report

In 2014, Birmingham City Council commissioned the Regional Observatory to produce a report to support the development of the food and drink sector in the Greater Birmingham and Solihull Local Enterprise Partnership (GBS LEP) area and the West Midlands Region. The report cited some key statistics on the value of the food sector to the city.[14]

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12 ONS, UK Business: Activity, Size and Location (2013)

13 Birmingham City Council, Birmingham Economic Profile (2010)

14 Regional Observatory *Research to support the development of the food and drink sector in the Greater Birmingham and Solihull Local Enterprise Partnership (GBS LEP) area and the West Midlands Region* (2014)

In Birmingham food and drink is the third largest manufacturing industry in terms of employment. More than 8,400 people were employed in more than 300 food and drink companies in 2012.

In the last three years employment in the food and drink sector has expanded by 24% in the Greater Birmingham & Solihull Local Enterprise Partnership (GBS LEP) area and 15% in the West Midlands as a whole. The sector has significantly out-performed Great Britain as a whole – where there was growth of just 4%.

The Regional Observatory Report cited a number of key growth drivers within the food and drink sector. These are:

- wholesale/distribution of chocolate/confectionery
- wholesale/distribution of beverages
- wholesale/distribution of meat and poultry
- wholesale/distribution of fruit and veg
- dairies and cheese making
- processing of fruit and veg
- manufacture of ready meals

2.4 Food businesses in Birmingham

note: The lists of food companies in this section and in 2.5 is far from exhaustive. We hope, however, that we have included the major players as well as some other small companies notable for their niche and/or plans for expansion.

2.4.1 Manufacturers

2 Sisters Food Group

2 Sisters is one of the UK's largest food manufacturing companies producing a wide range of frozen, chilled and ambient foods and owning brands such as Fox's, Goodfellas and Holland's. A family-owned business set up in 1993, its group offices are located on Colmore Row. It has grown largely by acquisition, most recently the UK arm of the Dutch company Vion in 2013. It currently employs 23,000 people in the UK.

It still operates four poultry plants in and around the West Midlands including the company's two original sites in Smethwick and its West Bromwich and Wolverhampton plants. In addition to these local assets, it has of course many others including 700 farms across the UK.

Aston Manor Cider

Aston Manor Cider is the UK's largest independent cider maker with sales of over £120M. It has a production and packaging facility in Birmingham and orchards in Worcestershire and Herefordshire.

Brunei Halal

Brunei Halal owns Ghanim International UK. It is a halal foods supplier that runs its European sales and distribution operations out of a warehouse in Saltley Business Park. It currently employs around 50 people at its Birmingham base, but has ambitious plans to increase its turnover to £200M by 2015-2016.

Cleone Foods

Cleone Foods is a supplier of traditional Caribbean patties with a turnover in excess of £2m. Around 60 employees work out of the company's factory on Icknield Street in Hockley making a variety of food products including ~100,000 patties a week.

Crucial Sauce Company

Based in Nechells, the Crucial Sauce Company began in 2001 on a 1,000 square foot location. It now occupies a 30K square foot site in Dollman Street with the help of new business partners, the British Pepper and Spice Company based in Northampton.

Mondelez International (Cadbury)
Cadbury has operated a major plant in Bourneville since 1879. It currently manufactures products such as Dairy Milk, Crème Egg and Wispa and employs around 960 staff. In January this year, Kraft announced it was investing £75M in modernising the factory but admitted that there was likely to be job losses as a result of the greater mechanisation.

2.4.2 Wholesalers

East End Foods
East End Foods is a £180 million turnover wholesaler of ethnic foods based in Aston on the site of the former HP Sauce factory. A family-owned business, it employs more than 300 people.

Minor Weir and Willis (MWW)
MWW is one of the UK's largest fresh produce distributors with a turnover of £240m. A family-owned business, the company is based at Perry Barr in Birmingham and employs around 200 staff.

Wing Yip
Wing Yip is a family-owned Chinese foods wholesaler with 300 employees nationally and with Birmingham serving as its headquarters and the location for one of its four superstores. They employ 350 people, have a turnover of ~£100M with a pre-tax profit last year of £4.9M.

In 2012, the Birmingham site was redeveloped and expanded and now has a larger store and a new warehouse to support the company's growing online business.

2.4.3 Supermarkets

The major supermarkets have a strong presence in and around Birmingham. The breakdown of stores (including convenience stores) within a 10-mile radius of Birmingham New Street station is as follows:

- 27 Sainsbury's, 25 Tesco, 17 Aldi, 17 Lidl, 12 Asda, 12 Morrisons and 4 Waitrose

2.4.4 Supermarket Distribution Centres

Aldi
Aldi opened its very first UK store in Stechford in 1990. Both its UK head office and a major regional distribution centre are located in Atherstone. Currently 345 staff work in the depot and 316 in the head office. Aldi is spending £70m redeveloping its Atherstone HQ with a planned completion date of 2017. It has bought the lease on nearby building, Atlantic House, to accommodate the increasing number of staff while the development takes place.

Sainsbury's
Sainsbury's has a major regional distribution centre at Hams Hall near Coleshill, which employs 1,000 people, including 700 in the warehouse and around 250 lorry-drivers.

2.4.5 Foodservice operators

Amadeus
Part of the NEC Group, Amadeus provides retail catering, event catering, stadia catering, conference and banqueting, private and business catering, mobile and pop up catering. It provides all the catering to the NEC and had a turnover of £27m in 2012/13, employing over 400 permanent staff.

Brakes Group
Brakes Group is a leading supplier to the foodservice sector. It has three facilities located in Smethwick – Woodward Foodservice, a distributor of food products owned by Brakes but run independently; M&J Seafood, the UK's largest independent seafood supplier when it was bought by Brakes in 1999 has a depot in Smethwick; and Brakes itself also has a depot in Smethwick.

Compass
Compass Group, the world's biggest contract caterer, has its UK Operations Head Office in Rubery. The company employs 60K people in the UK and Ireland, serve 1M meals a day, and have an annual turnover of £1.8bn.

Kingfisher Midlands
Kingfisher Midlands, part of the Bidvest Group, is a fish and seafood distribution business. It opened in Great Barr in 2013.

Mitchells & Butlers
The UK's largest operator of pubs, restaurants and bars has its headquarters in Fleet Street. Mitchells & Butlers had a turnover of £1.9bn in 2013 and served 120M meals through its outlets.

The Sarjeant Partnership
Founded in 2004 in the Jewellery Quarter, the Sarjeant Partnership opened its first retail outlet, The Handmade Burger Co, in Brindley Place. It is expanding rapidly, currently with 22 outlets across England and Scotland.

2.4.7 Restaurants

TripAdvisor lists 1,495 restaurants in Birmingham.

Birmingham has four Michelin starred restaurants featured in the 2014 Michelin Guide — Purnell's, Simpsons, Turners in Harborne and Adam's.

Two Birmingham restaurants featured in the latest Sunday Times Top 100 List – Loves (Browning Street, opposite King Edwards Wharf) and Michelin-starred Purnells.

Birmingham is renown for its ethnic cuisine. Marketing Birmingham ensures the Balti Triangle features on much of the marketing literature for the city; its value often quoted to be worth £6bn to the city economy.[15] It's worth noting the Balti Triangle is more than restaurants; the area also includes many fresh food outlets, notably the four-generation Raja Brothers business, the oldest on the Ladypool Road, whose shop stocks 15,000 'lines of exotic foodstuffs'.

There are two locally-owned coffee shops that began in the city centre and are expanding to new outlets: Urban Coffee and Yorks Bakery Cafe.

As with any city, there are large organisations that supply thousands of meals ever day. Most outsource their catering. Some of course do not; of note is the Queen Elizabeth Hospital Birmingham and Aston Villa Football Club; the latter employ ~1000 people in Hospitality and Events, and run a large allotment near their ground.

2.4.6 Fast-food restaurants

Fast-food restaurants have a strong presence in and around Birmingham; Birmingham Public Health Intelligence Unit work with the ONS indicated that there is a hot takeaway outlet for every ~1000 citizens, with over two-thirds of schools within a few hundred yards of one.[16]

In March 2012, the City Council introduced a new planning policy regarding fast food outlets, forbidding planning permissions near schools, and forbidding more than 10% of units in any area to be hot food takeaways; by the spring of this year, 35 out of 73 shopping areas could not have any further hot food takeaways.[17]

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[15] We couldn't find evidence for this in the data sets we looked at — which isn't surprising. Its actual value is debatable but has to be considerable.

[16] http://www.ordnancesurvey.co.uk/business-and-government/case-studies/nhs-birmingham-mapping-the-way-to-good-health.html

[17] Birmingham Post *Birmingham takeaway bans begin to pay off*. Birmingham Post, 14 March 2014

The breakdown of large franchise outlets within a 10-mile radius of Birmingham New Street station are as follows:

- 69 Subway, 48 McDonald's, 29 KFC, 13 Burger King

2.4.8 Food markets

Bull Ring Indoor Market
Houses 140 stalls, including the famous fish market. Other stalls sell fruit and vegetables, confectionery, fish, meat and game along with other household goods and clothes.

Bull Ring Open Market
Provides 130 stalls offering fresh fruit, vegetables and other goods and services.

Wholesale Markets
Occupying a 21-acre site off Pershore Street the market has 235 trading units and includes horticultural, fish and meat markets. The City Council announced in January this year that the Markets would be moving to a 210,000 square foot purpose-built centre in the Food Hub zone in Witton in May 2015.[18]

Fine Food market
Held in Birmingham City centre, along New Street, every first and third Wednesday of every month.

Fine and Local Food Events
There's a local produce market held at Brindleyplace in Central Square on the last Friday of every month. Sutton Coldfield also has a Fine and Local Food Event on the second Friday of every month, Solihull has a Fine and Local Food Fayre on the third Saturday of every month and there is a weekly street food market in Digbeth named the best in the UK last year.

Farmers' Markets
There are a number of farmers' markets situated in and around Birmingham including those at:

- Bearwood, Birmingham University, Harborne, Kings Heath Street Food Market, Kings Heath Farmers' Market, Kings Norton, Midland Arts Centre (the mac), Moseley, Solihull High Street Farmers' Market, Walsall Farmers' Market, Worcester Farmers' Market, 24 Carrots Market in the Jewellery Quarter.
- In addition, Beckett's Farm in Wythall has a retail outlet mostly sourced with local produce, as well as having conference and meeting facilities and leisure areas.

2.5 Other key food sector companies within the West Midlands

ABP Group
The meat processing giant ABP has a major beef abattoir in Ellesmere, Shropshire. It also has a regional sales office in the Birmingham Business Park and employs around 700 people within the region in total.

A. F Blakemore
A national retailer, wholesaler and distributor with its HQ in Wolverhampton, A. F Blakemore is a family-owned business employing 7,900 people and with a turnover of over £1.2bn. It operates eight businesses, including the Spar retail outlets.

European Food Brokers
Set up from scratch in 1991, European Food Brokers has a turnover of £115M/year. With its HQ in Walsall (in the unforgettably-named Chateau Pleck in Darlaston Road) and still a family-owned business, it's a wholesaler of beers, wines, spirits, confectionary and soft drinks. It also owns the Two Ticks cash and carry, Whittalls and Oddbins.

18 The move to Witton, however,, doesn't appear to be a done deal. At the time of the release about the move, Councillor Ward was quoted in the Birmingham Mail as saying *We anticipate that, unless there are any dramatic changes, that our preferred option is the Hub at Witton.*

Eurofins

Eurofins is a Luxembourg-based company, with a turnover of €1.1bn that provides private sector laboratory testing services. A major UK food-testing centre of theirs is located in Wolverhampton.

Marston's

The Banks's Park Brewery in Wolverhampton dates back to 1875. Marston's recently announced plans to rebuild the headquarters of the brewery, which currently employs around 500 people. A further 600 people work across the company's Wolverhampton sites, which include the main distribution base and the Park Brewery.

Middleton Food Group & Middleton Cash and Carry

An ingredients supplier and cash & carry based in Willenhall, the family-owned Middleton Group has a turnover of £70m and employs 250 people.

MKG Foods

Based in Aldridge, MKG Foods is a multi-temperature food distribution business.

Müller

Müller's Market Drayton dairy, which was constructed in 1992, employs around 1,000 people. It processed in the region of 240m litres of milk in the year 2010/11 of which over 90% was sourced from within a 30-mile radius of the dairy. Last summer work began on building a new £17million butter plant, which will create 100 jobs. In January 2013 it took over the Minsterley creamery, which makes chilled desserts under licence from Cadbury and employs 80 staff.

Poundland

Poundland is FTSE 250 company, a 'value retailer', with its HQ in Willenhall. It has a turnover of £880m and employs 10,000 people serving 2.75m customers a week. Although not exclusively a food retailer, sells an increasingly wide range of mainly ambient foods, confectionary, crisps and drinks; in their last accounting year, these comprised 14% of its floor space and brought in 28% of its profits.

2.6 Further & Higher Education

Aston University School of Life Sciences

Aston University School of Life Sciences also provides accredited CIEH courses in food safety.

School of Chemical Engineering at the University of Birmingham

The University of Birmingham School of Chemical Engineering undertakes significant work about and for the food industry led by nine senior academics, including CPD courses run by UoB's Food Safety Group.

University College Birmingham

University College Birmingham is one of the largest UK providers of both vocational and higher education course in hospitality, tourism and leisure management, including culinary arts. It has recently opened its new large central campus in the Jewellery Quarter from its site on the corner of Great Charles Street.

2.7 Professional services

It's impossible to find out from the economic datasets in the ;public domain what professional services there are for the food industry based here in the West Midlands. Representatives from both these firms attended the Elliott Review workshop in April 2014:

Eversheds

The International Food and Drink Sector Group of the law firm Eversheds LLP is head-quartered in their Birmingham office.

Sanderson plc
This IT software and services company has a large and growing division designing and delivering ERP systems into the food and drink manufacturing sector globally. Their HQ is in Coventry.

In addition **EuroPackaging UK** is a Yardley-based company providing integrated sales, distribution and manufacturing operation with expertise in a range of paper and plastic based packaging products to several industrial sectors including catering and food services. They employ over 1000 people world-wide and have revenues of over £170M per year.

Section 3 The profile of food in Birmingham

3.1 To what extent does food enter into socio-political decision making in the city?

In recent years a number of reports have been commissioned and initiatives launched that provide an insight into food's role in local decision-making.

3.1.1 Birmingham City Council

In 2011 Birmingham City Council published its most recent Local Economic Assessment.[19] Among the key findings of the report were:

- There continues to be a strong manufacturing presence across the city with particular concentrations of engineering and metals-based companies, automotive and food manufacturing.
- Birmingham has a marginally greater specialisation in accommodation and food service activities
- The city's ethnic diversity has encouraged the growth of some key Asian and Afro-Caribbean businesses, including Wing Yip, the UK's leading supplier of Chinese and Oriental food, as well as East End Foods and Cleone Foods.

3.1.2 Business Birmingham

Business Birmingham is the city's official inward investment programme whose aim is to raise the city's profile as a key business destination. It identifies food and drink as one of five high-growth sectors central to its regional strategy, citing the following statistics:

- 90% of UK consumers are in reach within four hours of Birmingham[20]
- The food and drink sector in the region has a turnover of £14bn, creating a GVA of £3bn and supporting more than 59,000 employees
- A typical wage for a production operative is £6.31 – £7.25 p/h and a typical annual salary for a line manager £18,000 p/a
- Birmingham boasts a variety of well-established business networks specialising in the food and drink sector including Heart of England Fine Foods (HEFF)* and the Regional Food Academy based at Harper Adams University
- The University of Birmingham and Birmingham College of Food are renowned internationally for their expertise in food
- The West Midlands has a wide range of regional produce with particular strengths in red meat, bakery and confectionery, fruit and vegetables, breweries and drinks, ethnic foods, dairy, food technology and machinery
- The ethnic diversity of the region brings new food cultures to explore (ethnic and fusion) offering cuisine from more than 27 countries
- The Black Country is the UK's highest importer of spices, with over 16% of all spices nationally imported ending up in the region

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[19] Birmingham City Council, Local Economic Impact Assessment for Birmingham (2011)

[20] Business Birmingham, Sectors, Food & Drink (2014)

* HEFF went into voluntary liquidation in June 2014 citing the loss of a contract with Shropshire Council and slow trading.

3.1.3 Economic Zones

In 2012, Birmingham City Council published a report entitled Economic Zones: Investing in Birmingham.[21]

This set out a plan for maximising the city's economic growth through investing in high-growth sectors. It identified six zones that married economic growth potential with the city's spatial opportunities. These were:

- Advanced Manufacturing Hub
- City Centre Enterprise Zone
- Tyseley Environmental Enterprise District
- Longbridge ITEC Park
- Life Sciences Campus
- The Food Hub

The Food Hub identifies an opportunity to form a cluster of food processing, manufacturing and distribution businesses at the former IMI site in north Birmingham with its access to the motorway network and availability of serviced plots for bespoke development.

The report acknowledged the economic value of brands already based in the city such as Cadbury as well as Birmingham's leading role in developing new food technologies. It also cited a number of other advantages:

- Birmingham is ideally suited for food distribution as it is at the centre of the national motorway network. 90% of the UK's market is within four hours of Birmingham.
- Access to raw materials within the region.
- Local market supports agglomeration around national suppliers of ethnic cuisine.
- Birmingham boasts a skilled workforce across all components of the sector.
- Mid-level skills in production and processing are readily available, with specialist expertise including Halal and ethnic foods.
- World-renowned food technology and manufacturing expertise is developed at the region's universities and through existing R&D activity.
- The new food hub could accommodate 140,000 square metre of new floorspace for light industry, general industry and storage and distribution.

To date the most significant development in relation to the Food Hub has been the proposed moving of the wholesale market from the city centre to a new purpose built 210,000 square foot site within the Food Hub zone.

3.2 Should food enter into socio-political decision making more than it does?

Initiatives such as The Food Hub suggest that the economic value of food to the city of Birmingham is recognised and acted upon at local government level. However, to date private investment in the food hub has been largely absent and, given the austerity measures under which local authorities are operating, none has been forthcoming from the local authority.

Indeed, there is a dearth of information about the Food Hub, what it has and what it could be, compared to the activity (meetings, reports et al) about the other zones. The City Council Economic Zones report the former IMI site in Witton, designated to be the Food Hub zone, is is owned by PruPrim (now M&G Real Estate), and that the site has planning permission for B1 (light industry), B2 (general industry) and B8 (storage and distribution) uses.

[21] Birmingham City Council, Economic Zones, Investing in Birmingham (2012)

In addition, there is little evidence that the social importance of food to the prosperity of the city has been the focus of much political attention. Indeed, there is evidence that on key indicators of social wellbeing such as health and poverty, Birmingham has significant problems that need to be addressed.

3.2.1 Health

In 2012 Public Health England carried out an Active People Survey[22] to determine the prevalence of underweight, healthy weight, overweight and obesity among adults and children in England.

In each case Birmingham exceeded the national average for people carrying excess weight.

% of adults	Overweight	Obese	Total
Birmingham	41%	23%	64%
national average	40.8%	23%	63.8%

% children carrying excess weight	4-5 year olds	10-11 year olds
Birmingham	23.2%*	38.5%*
national average	22.2%	33.3%

* In these cases, Birmingham is classed in the 'worst' category compared with the national average.

Dr Hillary Shaw, a geographer at Harper Adams University, published a paper in the British Food Journal in 2010[23] about food access, diet and health in Birmingham. It found that the level of qualifications was the dominant influencer on obesity and diet. Particularly, less wealthy people in the more affluent areas of Birmingham were likely to suffer financial difficulties in eating healthily. In less affluent areas, too, being in (low-paid) work actually increased the chances of being obese, as compared to being unemployed in these districts.

3.2.2 Food poverty

According to the Trussell Trust, 913,138 people across the UK were provided with three days' emergency food in 2013-14. Of these, 93,461 were resident in the West Midlands making it the fourth most in need region behind the North West, South West and London.

There are 10 Trussell Trust food banks operational within a 10-mile radius of Birmingham City Centre, as well as others run by various community and faith groups.[24]

3.2.3 Food safety and integrity

In 2013, Birmingham ranked 319 out of 395 local authorities in a *Which*? survey on enforcing food safety rules to ensure that restaurants and takeaways are not putting people at risk[25]

The survey found that:

- 97.4% of premises operational had been given a risk rating
- 70.4% of the high-and-medium-risk food businesses in the area were compliant with food hygiene requirements.

[22] Public Health England, Active People Survey *Adjusted prevalence of underweight, healthy weight, overweight, and obesity among adults in England* (2012)

[23] Shaw, H (2012) Food access, diet and health in the UK: an empirical study of Birmingham, British Food Journal

[24] Birmingham Food Council is collating information on food poverty and can be found here: http://www.birminghamfoodcouncil.org/useful-info/food-poverty-food-insecurity-useful-info/

[25] The Daily Telegraph *How does your council score on enforcing food safety?* (2014)

- 96.6% of interventions were carried out by inspectors where they were required

Interventions by local authorities to uncover food fraud, such as inspections and surveillance operations, dropped by 16.8% in 2012-13.

Birmingham was among seven councils that failed to collect any samples of food in 2013 to test whether they were what they claimed to be.

In April 2014, *Which*? published the results of a testing programme it carried out on local takeaways in Birmingham and London.[26] It bought 30 takeaways in Birmingham and 30 in London (15 lamb curries and 15 minced lamb kebabs in each location) and tested them for the presence of lamb, chicken, beef, pork, turkey, goat and horse DNA. In Birmingham a total of 16 out of 30 samples were found to be adulterated: eleven contained a mix of lamb with beef and/or chicken and five contained no lamb at all. In London eight out of 30 samples were adulterated: six contained a mix of lamb with beef and /or chicken and two contained no lamb at all.

Which? considered a sample to be adulterated if it contained more than 5% of another meat. Several of the other samples contained beef and chicken in lower levels, which could have been due to cross-contamination at the restaurant or by the producer rather than deliberate fraud.

[26] Which? *Food Fraud – what's in your takeaway*? (2014)