Global Versus Regional Food

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The liberalisation of trade and capital transactions since the 1970s has strongly contributed to what today is known as globalisation. Food of all sorts, fresh as well as processed, and agricultural raw materials also became increasingly part of a worldwide division of labour and production. Especially by foreign direct investment and globally integrated networks of trade, transnational agro and food corporations emerged. Intertwined are processes of concentration in the retail sector of many countries. Today vertically integrated transnational food businesses represent a dominant market share. But regional and local food is still alive, in parts vibrant and developing, driven by quality and prominence of the producing regions. Furthermore, new paths of distribution as well as direct links between producers and consumers constitute short supply chains of food and thus relevant alternatives to globalised practices.

Die Liberalisierung von Handel und Kapitaltransaktionen seit den 1970er Jahren hat stark zu dem beigetragen, was wir heute als Globalisierung kennen. Lebensmittel aller Art, sowohl frische als auch industriell verarbeitete, und ebenso landwirtschaftliche Rohstoffe sind zunehmend Bestandteil einer weltweiten Teilung von Arbeit und Produktion geworden. Insbesondere durch ausländische Direktinvestitionen und weltweit integrierte Handelsnetze entstanden transnationale Agrar- und Lebensmittelkonzerne. Dies geht in vielen Ländern mit Konzentrationsprozessen im Lebensmitteleinzelhandel einher. Heute haben vertikal integrierte transnationale Lebensmittelunternehmen einen beherrschenden Marktanteil. Doch eine Vielzahl von Initiativen im In-und Ausland belegen und beleben die Nachfrage nach regionalen und lokalen Nahrungsmitteln, bestimmt durch deren Qualität und Bedeutung für ihre Anbauregion. Außerdem begründen neue Vertriebswege und direkte Verbindungen zwischen Produzenten und Konsumenten kurze Lieferketten für Nahrungsmittel und stellen somit maßgebliche Alternativen zum globalisierten Handel dar.

For millennia, human production, processing and consumption of food were locally restricted. Accordingly, agriculture and food cultures developed on the continents and in the regions a wide range of cooking recipes and diverse spiritual and religious customs, based on different species and varieties. Mankind has used roughly 20,000 edible plants, and regarding important food plants such as rice even more than 100,000 varieties and landraces. The big wave of European colonialism from the 16th century on launched a first phase of globalisation of food production, trade and consumption (Wallerstein 2011). However, modern global trade of agricultural commodities and food of all sorts was not established until steam ships and cooling technology were available. During the 19th century, agricultural goods and food from the colonies were available in the capitals and bigger cities of the colonial powers. During the 20th century, especially after the Second World War, external inputs for agricultural production (fertiliser, pesticides, seeds) as well as the processing of agricultural produce were increasingly provided by national and transnational corporations (TNCs).The industrialisation of cultivation as well as that of food processing and cooking are twins. In the present article, we sketch tendencies of globalisation as well as regionalisation of food during recent decades.

1 Tendencies of globalisation

1.1 Rapid Growth in Food Trade and Foreign Investments

The decline in regulations of international trade and investment flows and the increasing freedom to move capital, goods and services among the countries led to an increasing internationalisation of companies and integration of markets in the last three decades. Foreign direct investment grew much faster than both trade and income, additionally fuelled by mergers and acquisitions (UNCTAD 2013). This is also applicable for the food sector, as the list of leading transnational companies indicates: Food TNCs are well represented in the list of the largest 100 transnational cooperations. Only three industries (petroleum and mining, electronics/electrical equipment/computers and motor vehicles and parts) contain a larger number of entries than that of food manufacturing. Food manufacturing is characterised by a large number

of small local companies and a small number of very large firms and only the latter have entered global markets (Senauer/Venturini 2005).

Globalisation takes place at several stages of the food chain. In the following, we will focus on the retailing of food and its upstream influence. Within just a few decades, supermarkets have become the central locations of selling and buying of food. By the 1990s, supermarkets were responsible for the large majority of grocery sales in the EU and the US. This is due to several factors including urbanisation, increasing female workforce and rising incomes. This expansion of grocery sales via supermarkets was accompanied by an increase in scale and a concentration into large globally operating retailing companies (Oosterveer 2012). This becomes obvious when looking at the global retailer ranking where the top 8 companies are all supermarkets (Table 1). Starting in the early 1990s, the "supermarket revolution" moved out ofthe industrialised countries, reaching in a first wave Latin America, Central Europe and South Africa, in a second wave Central America and Southeast Asia and in a third wave China, Vietnam, India and Russia (Reardon et al. 2012).

1.2 Concentration in Retail and Vertical Integration

Over the past two decades, the market power of international retail companies along the food supply chains has grown considerably. According to Ross (2013), this power of the European food retail sector results mostly from two sources, the oligopolistic market position of EU food retail firms and the proliferation of closed buyer-driven supply chains.

As to the first concern, the past 20 years have witnessed tremendous consolidation in global food retailing (Vorley 2003). As a result of acquisitions and mergers, big vertically integrated retail firms often hold a market share bigger than 20 percent of the food retail sector in a given country (see case studies in McCullough et al. 2008). This trend is particularly pronounced in the European Union, where the market share of the top three retailers ranges from 30 percent to 50 percent. It is above 50 percent in Estonia, above 70 percent in Ireland, almost 80 percent in Sweden and almost 90 percent in both Denmark and Finland (Fig. 1).

Closed buyer-driven supply chains have emerged as a means by which retailers are able to exert considerable influence over the operations of upstream actors. Attributes of vertically integrated food chains are an overall strong governance, contractual agriculture and vertical coordination between producers, manufacturers, suppliers and retailers (McCullough et al. 2008; Vorley 2003). These structures grant retailers the ability to lock upstream actors into a particular supply chain (Sautier et al. 2006; Banana Link 2006). As a result, "farmers and suppliers are under 'unspoken economic pressure' to work with

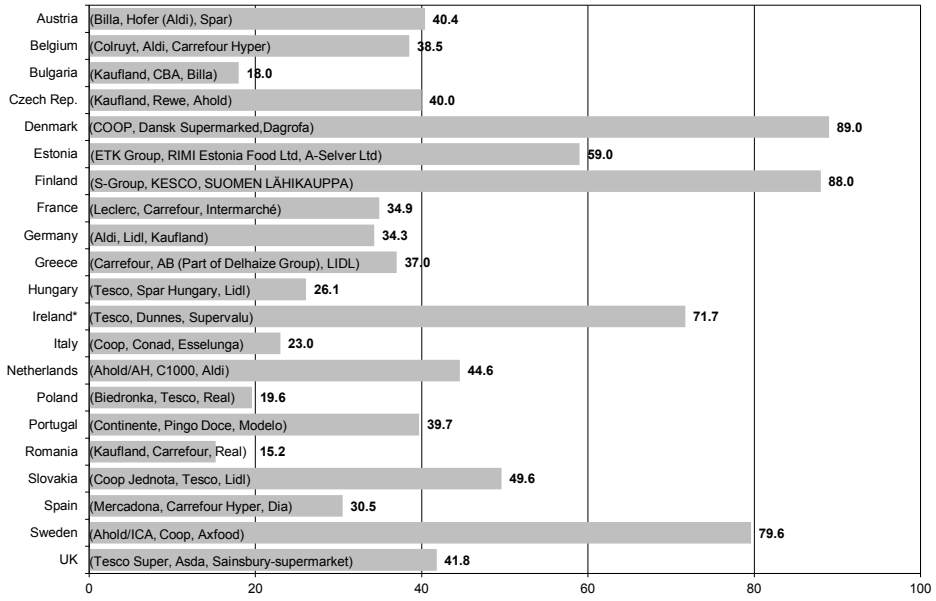
Table 1: Top food retailers worldwide 2011

Retailer revenue rank (within top global retailers)	*Name*	*Country of origin*	*Retail revenue (Million US$)*	*Countries of operation*	*% retail revenue from foreign operations*
1	Walmart	US	446,950	28	28.4
2	Carrefour	France	113,197	33	56.7
3	Tesco	UK	101,574	13	34.5
4	Metro	Germany	92,905	33	61.1
5	Kroger	US	90,374	1	0.0
6	Costco	US	88,915	9	27.0
7	Schwarz (Lidl)	Germany	87,841	26	55.8
8	Aldi	Germany	73,375	17	57.1
12	Auchan	France	60,515	12	n.d.a.
13	Aeon	Japan	60,158	9	n.d.a.

n.d.a. = no data available

Sources: Deloitte 2013 and National Retail Federation 2013

Fig. 1: Market share of top 3 retailers across EU Member States, 2010



Source: Food and Drink Industry 2011, p. 19

the retailer or processor without complaint. If there are problems, then the processor or retailer can simply refuse to buy", thereby ensuring a "docile group of suppliers" (Vorley 2003, p. 23).

These closed buyer-driven supply chains have been the subject of examinations by a number of national competition authorities in recent years. During the period of 2009–2011, several initiatives were taken to tackle the imbalance of negotiating power between large retail groups and food suppliers (Food and Drink Industry 2011). In Germany, the investigation of the Federal Cartel Office (Bundeskartellamt) focused on the competition conditions in the market for the procurement of food, beverages and tobacco by food retailers. In 2012, an internal Task Force dedicated to the food sector was set up by DG Competition within the European Commission (Food and Drink Industry 2011). In 2013, the German Federal Cartel Office issued a statement of objections against EDEKA, a cooperative grouping with more than 11,600 individual shops, for asking for discounts from dependent suppliers after the merger with Plus, a former competitor. According to its president, Andreas Mundt, the Federal Cartel Office assumed this to constitute an abusive practice insofar as EDEKA demanded benefits from its suppliers without an objective justification. Although tough negotiations between retailers and producers are normal in the food retail sector, in the present case EDEKA had crossed a line and abused its buyer power vis-à-vis its suppliers. It was argued that a powerful company had to treat its economically dependent suppliers in a fairer manner (Bundeskartellamt 2013).

2 Tendencies of Regionalisation

Increasingly globalised food chains are countered with a renewed interest in the local (Goodman 2003). Local and regional food systems are seen as an opposition to homogenisation, industrialisation and concentration in the globalised food systems with uniformed commodities (Hinrichs 2003).

A common definition of *regional* and *local* food does not exist, and the two terms are often used interchangeably (Kneafsey 2010). Local food is food grown near the respective villages or towns, whereas regional food encompasses greater areas up to federal states. Besides space, concepts of local/regional food also differ with regard to the steps in the food chain incorporated (Sauter/Meyer 2004, p. 30). Sometimes the terms alternative food systems or networks are used to signal the opposi-

tional dimensions to conventional food supply systems (Kneafsey 2010; Goodman et al. 2011).

Tendencies towards the (re-)regionalisation of food are influenced by a combination of motives:

- *Rescaling* is intended by short food supply chains which reduce the number of intermediaries involved between agricultural production and food consumption, up to direct interaction between farmers and consumers (Kneafsey et al. 2013). This is seen as an alternative to mass commodity production and associated with consumer demand for greater transparency and traceability in food production (Goodman 2003).
- *Respacing* links foods to the place of production. On the one hand, this is based on a reassertion of foods with local and regional identities and distinctive qualities, often in combination with traditional and artisanal production (Parrott et al. 2002). On the other hand, local food systems restrict production, processing and retail within a defined geographical area.
- *Reconnection* addresses social intentions such as empowering und revitalising local rural communities. The impetus for reconnection comes from urban consumers motivated by a whole range of desires (Kneafsey 2010).
- *Combination of different knowledge forms* is intended to achieve a fruitful interaction of local layman with expert knowledge and to revitalise traditional local knowledge. Local agro-food systems are described as innovative learning systems with a strong focus on social innovations (Balász 2009).

The major forms and developments of local/regional food systems are discussed in the following.

2.1 Local Food for National and International Markets

The first category of local food is focused on the *locality* (Ilbery/Maye 2006). This category represents local and regional food specialities, based on the association between *terroir*, tradition, artisanal production and quality (Parrott et al. 2002). In the EU, such regional and traditional foodstuffs can be protected by geographic indications (GIs) – Protected Designation of Origin (PDO) and Protected Geographic Indication (PGI)[1] – which were introduced at the beginning of the 1990s in the context of the EU agricultural policy reform to reduce price supports (see contribution of Deppermann et al. in this issue). The EU system of geographical indications represents an extension of already well-established systems of regional designation in many southern European countries such as the Appellation d'Origine Contrôlée (AOC) in France with nearly 100 years of history for wine (Barham 2003; Parrott et al. 2002). The EU labels of origin can only be requested by groups of producers. They cannot be bought, sold or inherited and belong to the region itself, in contrast to trademarks which are owned by single-entity producers, which can be traded and moved out of the landscape of its origin (Barham 2003; Skilton/Wu 2013).

In the EU, 1,186 PDOs/PGIs for agricultural products and foodstuffs, 1,752 PDOs/PGIs for wine and 332 geographical indications for spirits from the EU-27 Member States are currently registered (EC 2014). Italy is the leading country with 262 PDOs/PGIs for agricultural products and foodstuffs, followed by France, Spain, Portugal and Greece. Nearly 75 percent of all currently registered products originate from these five countries. This distribution reflects the different European farming systems (see contribution of Meyer in this issue) and food cultures. The Mediterranean agriculture is characterised by a large number of small-scale, labour-intensive farms who often use traditional methods and produce a diverse range of crops. In contrast, the Northern European food culture is more shaped by a functional, commodity-driven culture (Parrott et al. 2002).

The most important product classes are fruit, vegetables and cereals, fresh or processed (338 PDOs/PGIs), fresh meat and meat products (284 PDOs/PGIs) and cheese (217 PDOs/PGIs) (EC 2014). Many products are distributed on regional markets due to the small amount of production. But a number of products (such as Champagne and Cognac from France, Scotch Whiskey from the United Kingdom, Grana Padano and Parmigiano Reggiano from Italy, Roquefort from France) are sold EU-wide and internationally. EU sales of GI products to third countries were estimated at 11.5 billion euros in 2010, representing 15 percent of all extra-EU trade for food and beverages. Ap-

proximately half of these exports were GI wines (51 percent), GI spirits amounted to 40 percent and the rest (9 percent) were agricultural products and foodstuffs (Chever et al. 2012). The estimated sales value of all GI products in the EU in 2010 was 54.3 billion euros, a share of 5.7 percent in the European food and drink sector. Wines accounted for more than a half (56 percent), almost a third (29 percent) was attributed to agricultural products and foodstuffs. Regarding the sales value, the main sectors for PDO/PGI products were cheeses (6.3 billion euros, 40 percent) and meat products (3.2 billion euros, 20 percent) (Chever et al. 2012).

Labels of origin have the potential of re-linking agricultural production to the social, cultural and environmental aspects of particular places, thus distinguishing them from anonymous mass produced foods (Barham 2003). As specialities, GI products often achieve a price premium over corresponding standard products, ranging from only marginally higher to double prices and more. Producers of final GI products obtain in most cases a higher gross margin than for standard products, but for farmers supplying agricultural raw materials for GI products, the situation is less conclusive (EC 2013b).

2.2 Regional Food in Conventional Retail Systems

Despite the concentration in the retail sector with its centralisation of procurement, regional food supply has remained important. Major reasons are the high segmentation in the food processing industry with many small and medium enterprises, established supply chains and the freshness of products. An assessment for the German food sector estimated that at the beginning of the 2nd millennium around 30 percent of the food processor sales were regional (region defined as one or two federal states) and around 20 percent of the retail food sales originated from the region (without unprocessed products such as fruit and vegetables). Bakery products, beer, meat and meat products, milk and milk products, non-alcoholic drinks and wine were identified as sectors with above-average sales of regional products (Sauter/Meyer 2004, p. 93).

In recent years, local and regional foods found increasing attention by big food retailers. They created their own regional labels and/or indicate regional products in their supermarkets (FiBL et al. 2012, p. 13). Thereby, retailers are using "local" in very fluid terms (Ilbery/Maye 2006). Additionally, more and more supermarket "corners" for local products are being developed (ENRD 2012, p. 7). An increase in consumer demand is the primary force behind integrating regional food in supermarkets, but at the same time it is a possibility to create "points of difference" in the uniform assortment (see contribution of Hallier in this issue).

Consumers in Germany are confronted with numerous regional labels. Most federal states founded regional marketing organisations which created diverse regional brands and regional labels without common standards and only partly differentiated by conventional and organic foods. Additionally, some hundreds of regional initiatives exist in Germany, from which roughly 120 to 150 regional brands have a market relevance beyond local farmer's markets (FiBL et al. 2012, p. 20; Sauter/Meyer 2004, p. 38).

The German label *Regionalfenster* (regional window) was introduced at the beginning of the year 2014 in order to establish a reliable and uniform label for regional food in Germany. This initiative is privately organised with partners from the whole food supply chain, including major retail companies, and supported by the Federal Ministry of Food and Agriculture (BMELV 2013). The new label indicates the region from which the agricultural raw materials originate and where the final product is processed/packed. The assignment of a region can be an administrative district, federal state or radius in kilometres, by definition of the labeller. In the case of compost products made up of different raw materials, the total sum of all regional raw materials has to be reported as a percentage. The label must be certified by a third party (Regionalfenster 2014). In May 2014, around 1,500 products from 190 companies were labelled (http://www.agrarheute.com/regionalfenster-produkte)[2].

2.3 Local Food Systems

Local food systems or networks are regarded as a counterbalance to industrial systems of food

production and supply. They focus either more on short food supply chains (farmer's direct marketing) or new social cooperations (social movements for local food systems).

Farmers' Direct Marketing

New ways of direct marketing have developed in place of traditional direct sales. Farmers have created niche markets for selling their own produce (Karner 2010, p. 32). A broad spectrum of farmers' direct marketing schemes has evolved in the last decades (Kneafsey et al. 2013):

- *On-farm schemes*: farm shops, farm-based hospitality, roadside sales, pick-your-own schemes, etc.
- *Off-farm schemes*: farmers' markets, farm-based delivery schemes, farmer-owned shops, food festivals and fairs, etc.

The main product categories sold in these schemes are fruit and vegetables, fresh and prepared meat, dairy products and beverages (Kneafsey et al. 2013). In some cases, individual farmers supplement their own assortment with products from other farmers or wholesale.

Sweeping differences exist among the EU Member States with regard to the development of direct sales, which are associated with national and regional differences in farm structure, distribution channels and cultural differences. According to the Eurostat Farm Structure Survey 2007, on average about 15 percent of all farms sell more than 50 percent of their produce directly to consumers, with nearly a quarter of all farms in Greece (EC 2013a). Around a third of all farms in Austria and Italy are involved in direct sales, but only around 3 percent of the producers in Denmark (ENRD 2012, p. 11). Even in countries with a high share of farmers involved in direct marketing, the percentage of overall food market is low. For example, it was estimated that 25 percent of French holdings sell some produce directly, although in total these sales only make up 3 percent of the French total food market (Gilg/Battershill 1998).

Direct marketing is often associated with fresher, healthier and/or higher quality food (Sonnino/Marsden 2006). Food in direct marketing can be based on different agricultural production systems, from organic farming to intensive production methods. A case study of France shows that "circuits courts" (short food supply chains which are not limited to direct sales) are more concentrated in the less productive agricultural regions and the involved farms are in general smaller than those involved in longer supply chains (Kneafsey et al. 2013, p. 86).

Direct marketing enables farmers to obtain a price premium compared to sales to intermediaries, a greater share of retail value for farmers and chances for the diversification of products. On the other hand, direct marketing normally implies additional labour requirements, investment costs, etc. The claim is that the result is an overall increased income for producers, but this is not well examined and supported by empirical research. In contrast, there is evidence that local food systems and short chains do have a higher multiplier effect on local economies than longer chains, with impacts also on maintaining local employment (Kneafsey et al. 2013).

Local food systems and short food supply chains are seen as more climate-friendly and less energy-consuming due to a smaller transport carbon footprint (ENRD 2012, p. 15). But different life cycle analyses come to heterogeneous results and the environmental effects are inconclusive. The reduction of environmental impacts is dependent from the methods of production and processing and the logistical arrangements (Kneafsey et al. 2013, p. 14).

Social Movements for Local Food Systems

Where direct marketing approaches remain rooted in commodity relations, different approaches for local food systems attempt to construct an alternative to the market, as reflected in an explicit emphasis on community building (Hinrichs 2000).

Community supported agriculture (CSA) is a grassroots movement based on a direct partnership between a farmer and local consumers, where the community shares the risks and rewards of production (Hinrichs 2000; Soil Association 2011). Consumer participants pay for their share of the yearly production in advance of the season and the farmer provides the participants a weekly basket of the often organic products. CSA usually incorporates

seasonal farm festivals, field days, on-farm work or educational experiences and often children's activities. The aim of such interactions is that farmers and consumers learn more about each other's circumstances, interests and needs (Hinrichs 2000).

The model has its roots in Switzerland and Japan and was taken up in the US in the 1980s. The number of CSA farms in the US rose from 2 in 1986 to 1,144 in 2005 (Martinez et al. 2010). The census of agriculture 2012 reports 12,617 farms which marketed products through CSA (USDA 2014, p. 558). In the meantime, CSA has also spread in some European countries: For example, 62 CSA farms are currently counted in Germany (http://www.solidarische-landwirtschaft.org); 80 CSA initiatives were identified in England (Soil Association 2011, p. 4).

Motivations for participating in CSA initiatives are environmental and social values, the provision of healthy and high quality food, the support for local farmers and the search for "re-embedded" markets, allowing for more direct and personal interaction (Brehm/Eisenhauer 2008; Soil Association 2011). In a survey of CSA initiatives in England around two thirds of the questioned members indicated that they changed their cooking and eating habits through using more local, seasonal and healthy food and their shopping habits through a shift to more local shopping instead of purchasing at supermarkets (Soil Association 2011, p. 5).

Food cooperatives[3] are another approach for community building in local food systems and can be found in all industrialised countries. A food cooperative (or food coop) consists of a group of consumers which organise the purchasing und distribution of food collectively. Food coops can be enterprises and non-profit organisations. They range from informal small buying groups to large-scale, formalised structures of a store-front cooperative or community buying scheme. The membership figures range from small initiatives with 10 members up to more than 10,000 (Biocoop in France) and 250,000 members (Seikatsu Club in Japan) (Little et al. 2010).

Food coops are seen as a way in which consumer can regain and enact control within the food supply system. Motives for building up food coops are in particular enabling the distribution of local and organic food as well as enhancing social networks and community experience. Small groups make use of volunteer labour and community/household buildings, where the bulk purchase of food is delivered and members of the group come together to divide it into orders. Some initiatives have undergone profound organisational changes over time. For example, Biocoop in France began as a series of small buying groups in the 1970s and is now a national federation of independent stores, where paid employees have replaced volunteer labour and direct interactions with producers are minimal (Little et al. 2010). The development of food cooperatives is also encouraged in order to address the issue of food poverty and to promote food equality. For example, in the frame of rural regeneration policy, 300 food coops were helped to set up in Wales (Hunter 2011).

Finally, *urban community gardening* is an approach for consumers to produce their own food at local level. Urban agriculture is important for the local food supply in the Global South, where the production of food is often a subsistence activity. Community gardens in North American cities also have a focus on growing food for the poor (McClintock 2010). In Europe, the increasing movement of urban gardening is linked to the reappropriation of urban development and the decommodification of food production. Community gardens are a form of collective urban agriculture run by volunteers and civic associations[4], often with collective areas as well as individual plots. Most of these gardens have multiple functions: food provision, meeting point and community building as well as political battle for the disposition of urban public space (Rosol 2010).

In recent years, people of very different milieus have joined forces for planting gardens in major European cities. They grow produce, keep bees, reproduce seeds, organise open-air mealsand take over and manage public parks (Müller 2012). Since the mid-1990s intercultural gardens have developed in Germany as social space for communication and integration (Müller 2007). For Germany, a total of 380 urban community gardens are currently listed in an online data base (http://anstiftung-ertomis.de/urbane-gaerten/gaerten-im-ueberblick). In cities such as Berlin and New York, a shift from community gardens as part of urban movements towards community gardening as a

form of voluntarism with public support took place at different times (Müller 2007; Rosol 2010).

3 Outlook

Sometimes the growth and spreading of the globalised production, distribution and consumption patterns seem unstoppable. Strong drivers of globalisation persist, and partially intensify in international and national markets. But, considering the fact that not more than roughly 20 percent of all seeds in the global agriculture are commercial seeds and only 10 percent of the global rice harvest is traded internationally (Dano 2013), there is much room and potential for autonomous development beyond transnational corporations. As shown in our article, many forms of local/regional and community-oriented economic and social networks have emerged or have been revitalized which perceive food in all its aspects and activities from cultivation to eating in a holistic way as economic, social and spiritual cornerstone of the well-being of people, eco-systems and the social living (Alcamo et al. 2003). Thereby, governance and policies play a crucial role. Radical market approaches to agricultural and food policy results sooner or later in oligopolies, loss of food sovereignty and uniformity from farm to fork. Supporting policies are needed on the national and international level to facilitate and promote sustainable and vibrant cultures of food.

For expanding and strengthening local food and short food supply chains, numerous policy options are recommended (ENRD 2012; Kneafsey et al. 2013; IFZ 2010):

- Provide support in knowledge, training and skills so that the transition from agricultural producer to food producer, processor, distributor, marketer and customer relationship manager can be achieved;
- Adjust and implement food safety and hygiene rules so that unnecessary obstacles for micro, small and medium-sized enterprises are removed;
- Increase funding of regional development (LEADER) and rural development (second pillar of GAP), seek stronger integration and encourage Member States to lay down thematic sub-programmes;
- Enhance support for organic farming and dovetail policy initiatives in the organic sector and in local food because organic food is an important element in short supply chains;
- Facilitate a Europe-wide structure of information exchange and cooperation so that local initiatives can learn from each other.

Besides bringing localisation tendencies out of niches, the potential for a rearrangement of mainstream food chains is open to debate. Globalised food systems by multinational food manufacturers and retailers are in the first place an economic process (via foreign direct investments, mergers and acquisitions), resulting in oligopolistic structures and closed buyer-driven supply chains. Therewith, the task is to aim for fairer upstream relations in food chains. Regarding the material flow side, the "multi-domestic nature of food multinationals" (Senauer/Venturini 2005, p. 33) means that also transnational corporations build to a larger extent on national and regional networks and food chains. From this results the task to strengthen shorter food supply chains in the context of multinationals. These are preconditions for achieving all in all more sustainable food systems.

Notes

1) Regulation No 2081/92 on the protection of geographical indications and designations of origin for agricultural products and foodstuffs, replaced by regulation No 510/2006, replaced on quality schemes for agricultural products and foodstuffs, which now also includes traditional specialities guaranteed and mountain products. PDOs are more closely linked to the specific geographical area than PGIs, for the latter it is sufficient that one of the production stages took place in the defined area and not all stages (Becker/Staus 2008). Separated regulations exist for designations of origin and geographical indications of wine (Regulation No 1234/2007 on common organisation of agricultural markets), geographical indications of spirit drinks (Regulation No 110/2008) and aromatised wines (Regulation No 1601/91).
2) For comparison, the German organic label (Bio-siegel) was used by 4,376 companies on 68,572 products in 2014 (as of June 30), thirteen years after the implementation in 2001 (http://www.oe-kolandbau.de/bio-siegel/).

3) Cooperatives have a long tradition in agriculture and food retail in Europe, going back to the 19th century. Some cooperatives have undergone processes of concentration and growth, and some have become part of conventional food supply chains. The discussed food coops are a new development of recent decades aiming at local and sustainable food consumption.
4) In contrast to community gardens, the German allotment gardens ("Schrebergärten") with their long tradition are individually rented or owned plots, which are privately cultivated (Rosol 2010).

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The Role of Wholesale and Retail for the Food Supply of Tomorrow

by Bernd Hallier, European Retail Academy, Rösrath

The wholesale and retail sector is characterised by permanent change. The food assortment has grown in diversity and procurement sources, and it is increasingly based on highly processed foods. Stores have expanded in size, and at the same time strategies of segmentation like discounters or retailers with service facilities or even internet-traders are pursued. Information technologies have become an important strategic tool for distribution because "quick" defeats "slow" in a situation of global competition. Tracing/tracking and knowledge of good agricultural practice as well as data about their consumers, today, are an essential part of successful Corporate Social Responsibility of retailers. In the future, global access to food and feeding the poor will also play a major role in the political positioning of retail leaders.

Der Groß- und Einzelhandelssektor ist durch einen permanenten Wandel gekennzeichnet. Das Warensortiment ist in seiner Vielfalt gewachsen, die Zahl der Bezugsquellen hat zugenommen und das Angebot an küchen- und verzehrfertigen Produkten ist gestiegen. Die Verkaufsfläche im Lebensmitteleinzelhandel hat sich stark vergrößert und gleichzeitig wird eine Strategie der Diversifizierung verfolgt, wie die Aufteilung in Discounter, Händler mit Servicebereichen oder sogar Internet-Händler zeigt. IuK-Technologien sind zu einem essentiellen strategischen Instrument im Handel geworden, weil Schnelligkeit für weltweit konkurrierende Unternehmen von großer Relevanz ist. Die Rückverfolgbarkeit von Waren, das Wissen über die Gute Landwirtschaftliche Praxis ebenso wie das Wissen über das Konsumentenverhalten sind heute wichtige Elemente einer „Corporate Social Responsibility". In der Zukunft werden der globale Zugang zu Nahrungsmitteln und die Bekämpfung des Hungers eine bedeutende Rolle für die politische Positionierung führender Handelsunternehmen spielen.