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To cite this article: Steven Cummins, Nicolas Berger, Laura Cornelsen, Judith Eling, Vanessa Er, Robert Greener, Alexandra Kalbus, Amanda Karapici, Cherry Law, Denise Ndlovu & Amy Yau (2020): COVID-19: impact on the urban food retail system and dietary inequalities in the UK, *Cities & Health*, DOI: [10.1080/23748834.2020.1785167](https://doi.org/10.1080/23748834.2020.1785167)

To link to this article: <https://doi.org/10.1080/23748834.2020.1785167>



Published online: 03 Aug 2020.



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COVID-19: impact on the urban food retail system and dietary inequalities in the UK

Steven Cummins , Nicolas Berger, Laura Cornelsen, Judith Eling, Vanessa Er, Robert Greener, Alexandra Kalbus, Amanda Karapici, Cherry Law, Denise Ndlovu and Amy Yau

Population Health Innovation Lab, Department of Public Health, Environments & Society, Faculty of Public Health & Policy, London School of Hygiene & Tropical Medicine, London, UK

ABSTRACT

COVID-19 has focused minds on the resilience of the urban food retail system in supplying adequate food to the whole population. In this commentary, we discuss the impacts on diet of four plausible changes to food retailing in the UK: relocalisation of the food retail system, accelerated uptake of digital grocery, restructuring of fast-food environment and impacts on food banking and emergency food aid. We finish by outlining the challenge for research, policy and planning.

ARTICLE HISTORY

Received 13 May 2020
Accepted 14 June 2020

KEYWORDS

COVID-19; diet; health inequalities; planning; food

Background

Modern food systems can be characterised as complex, multi-scale networks of interdependent entities involved in the production, manufacture, processing, storage, transportation, marketing and retailing of food. Casti (2012) argues that complex systems, such as the food system, are vulnerable to X-events, rare, unexpected events of human origin that cause these systems to shift abruptly from one state to another. The current COVID-19 pandemic has been described as one such X-event, exposing the fragility of the food system.

The pandemic may have a lasting impact on consumer behaviour; food availability, affordability, choice and price; and lead to the reshaping of urban food retail systems. Disruptions to global supply chains and food availability as a result of increased demand and panic-buying, and a rise in food insecurity among low-income households have emerged as key immediate challenges during the ongoing crisis (Costa-Font and Revoredo-Giha 2020). All of which may have plausible impacts on inequalities in diet.

Though short-term effects are important, in this commentary, we draw on a range of emerging scientific, commercial and grey literature to focus on four possible medium-to-long term pandemic-related changes that might occur in one part of the food system: urban food retail. First, the potential re-localisation of the urban food retail system. Second, an accelerated transition to digital food purchasing. Third, restructuring of the fast-food environment. Fourth, reduction in capacity of the emergency food aid system. In each section, we focus on the UK context, and how these changes

might affect diet and dietary inequalities in urban populations. We end by briefly outlining the challenge of shaping a healthier and more equitable food retail system.

Re-localisation of the urban food retail system

Recent data from the UK suggest there has been a significant increase in grocery sales and large reductions in overall sales of out-of-home foods (takeaways, restaurants, and food-on-the-go) as a result of physical distancing interventions and food business closures (Kantar 2020). As a result, more food is being prepared and consumed at home, there is an increase in the use of local food retailing as households shop closer to home and source food items from a wider range of retailers and an increase in the use of digital delivery services for takeaway foods as mode of access shifts from physical to digital. In the UK, convenience stores have reported a 39% increase in sales, with market share increasing from 12.4% to 16.3% (Lee 2020). This 're-localisation' of consumer behaviour is likely to be sustained as physical distancing, and work-from-home advice will remain in force for some time. The crisis may also catalyse a longer-term shift in the proportion of people home-working, suggesting a potential opportunity for urban planners to support the increased use of local food retail, reducing reliance on national multiple supermarkets, shrinking supply chains and stimulating the development of the local food retail sector. In this context, a key challenge will be to mitigate the immediate local economic effects of post-pandemic recession. Many independent food businesses may not survive extended

periods of closure, and bankruptcies are more likely to be concentrated in lower income areas with higher rates of unemployment and less resilient local economies, and where food businesses are less profitable.

A new emphasis on re-localising food retail as a result of changes to consumer behaviour may have impacts on diet. In the medium-term continued, physical distancing will likely have a negative impact on the local out-of-home food market as households eat out less often and the sector shrinks as more marginal businesses fail. This may have the unintended consequence of improving diet as exposure to the out-of-home sector reduces and the number of occasions that households consume takeaway food also declines. However, it is very unclear what types of food retail will benefit or suffer in the medium term and what the policy response might be and therefore requires careful monitoring. For example, in the UK, current planning guidance has been temporarily relaxed to allow pubs and restaurants to offer hot food takeaway services and this may have spatial and planning implications (DHCLG 2020). As people use their local food environment more often and the economy recovers, there is a significant opportunity for planners to use existing powers to shape local food retail so that they maximise the potential health and environmental benefits. This might involve rebalancing local food retail by restricting takeaways, encouraging local markets and products, encouraging retail diversity and creating vibrant destinations with attractive healthy food offers.

Accelerating the transition to digital grocery

In the UK, though there has been a steady pre-pandemic increase in online food and non-food sales, the current crisis has accelerated this trend. Nielsen reports a 14% increase in online grocery sales, which equates to an extra 600,000 households shopping for food online for the first time in the UK (Nielsen 2020). This increase would have been larger if capacity of the distribution network to fulfil online orders had not been exceeded. The current (temporary) increase in overall grocery sales is likely masking the underlying transition from use of large format supermarkets (where sales are stagnant) to online and local convenience food retailing in the UK and elsewhere (McKinsey & Co 2018). Combined with the shift in consumer behaviour towards convenience stores and the reduction in demand for non-food products which larger food stores rely on for profitability, the potential medium-term impacts of this may be to reduce overall demand for physical supermarket and hypermarket retail and prompt further rationalisation of supermarket estates through store closures and site disposal. However, an important caveat is that potential change will be moderated by the extent to which online grocery will replace

physical as significant uncertainty still remains over its long-term commercial viability (Eley 2019).

This accelerated shift to digital grocery will likely benefit more affluent households at a faster rate than the less affluent. More affluent households have the financial capacity to meet minimum spend requirements for grocery, pay delivery costs and take advantage of the cost savings associated with bulk purchasing. The digital purchase of groceries may also result in a healthier overall basket as consumers are less influenced by in-store marketing and promotions. The retreat of physical and the expansion of digital also raises the prospect of a re-emergence of food access problems if this is unequally distributed. Lower income households have less access to the internet (Serafino 2019) and are likely to be the most disadvantaged, especially outside of the major urban centres where digital distribution capacity is less well developed. To what extent this may impact diet and dietary inequalities is unknown. Though pre-existing evidence for the influence of physical access to grocery stores and a diet is mixed (Caspi *et al.* 2012), the advent of novel technologies within the grocery sector suggests that active monitoring of the impact on dietary inequalities is required in order to avoid a new digital divide.

Restructuring of the fast-food environment

As we have outlined above, there is likely to be an increase in eating at home and a reduction in purchases of foods prepared outside of the home. In the medium term, a weaker economy and maintenance of physical distancing may well lead to lower overall takeaway and restaurant sales as people venture out less often. The takeaway sector will therefore adapt. For example, there has already been relaxation of planning rules to allow the repurposing of restaurants to takeaway service in order to preserve businesses. In addition, many multiple and chain fast-food restaurants such as McDonalds are actively increasing the provision of drive-through and curbside delivery services. However, independent takeaway businesses are likely to be most affected as they are less able to weather the effects of a prolonged economic downturn. This may reduce the overall number of independent fast-food outlets available. In addition, there is also likely to be an increased use of digital fast-food delivery services.

There is a great deal of uncertainty over which parts of the out-of-home sector will benefit and which will lose out. It may be that there will be shrinkage in the total numbers of takeaways in the whole sector, and a reduction in overall takeaway food sales but conversely market share for multiples/chains may increase. There may also be innovations and diversification in

mode of service, with the result being that more prepared and takeaway foods are eaten at home rather than out of home. Supermarkets may also become more important, increasing their market share for prepared foods which are traditionally the preserve of the out-of-home market (e.g. pizzas and chicken).

The implications for diet are uncertain. As noted earlier, there may be an overall total reduction in exposure to fast-food, but large-scale corporations might become more important and innovate to make it easier for households to purchase and consume fast-food, increase market share and grow overall sales. This may have negative impacts on dietary inequalities if the impacts of these changes are unevenly distributed.

Food banks and emergency food aid

The current crisis has exacerbated existing food insecurity for many people who already use food banks and increased the numbers of economically vulnerable households (Power *et al.* 2020). The pandemic has also had an immediate negative effect on the availability and accessibility of emergency food supplies delivered through food banks at a time of increased demand. This is due to reduced household donations to food banks, lower availability of surplus food from food businesses and the inability of food banks to bulk purchase foods from wholesalers and supermarkets as a result of rationing (Power *et al.* 2020). Post-pandemic, there is a great deal of uncertainty over what the continuing organisational and structural challenges within the food-banking system might be. It is unclear if food donations will remain stable, whether the structure and availability of the volunteer workforce might change, and it remains to be seen how services will be maintained and safely delivered while maintaining physical distancing. As a result of these pressures, the food-banking sector may possibly shrink despite increased demand. The economic downturn will see reductions in household income due to rising unemployment and recession, tipping more households into food insecurity at a time when food banks were already at capacity. This will have an immediate impact on low-income households' ability to purchase and consume a nutritionally adequate diet and impacts on diet will be felt most acutely among food insecure individuals within the food banking system. The impacts on diet and resultant health inequalities are obvious.

The challenge for research, policy and planning

The current pandemic has shown that, in the UK, although the modern food retail system works for most people, most of the time, it doesn't work for everyone all of the time – impacts will likely be socio-

economically and spatially patterned. The key challenge for researchers, policymakers and planners is to actively monitor how the food retail system changes, mitigate the harmful impacts of these changes, and ensure equity of outcome for the whole population. There is cause for optimism as UK local authority public health, and environmental health teams have already helped support food business through policies such as the healthier catering commitment (Greater London Authority Food Team (GLA) n.d.) and reduced exposure to fast-food through supplementary planning guidance (DHCLG 2019). Policymakers will need to creatively use existing tools in order to navigate through the aftermath of the pandemic to support food retail but to ensure that this is done in a way that promotes a good diet. Though the current crisis may have negative impacts on diet and food security, especially for the most disadvantaged, there is also an opportunity for those involved in urban practice to actively rebalance their local food systems for the better. With foresight and careful long-term planning, a healthier, more resilient and sustainable local food retail system may well be possible.

Disclosure statement

All authors have completed the ICMJE uniform disclosure form, there are no competing interests.

Funding

Nicolas Berger, Laura Cornelsen, Cherry Law are supported by a UK Medical Research Council Career Development Award to Laura Cornelsen. Robert Greener is supported by an MRC Studentship. Alexandra Kalbus is supported by a Bloomsbury Studentship. Amanda Karapici and Denise Ndlovu are supported by NIHR Doctoral Studentships.

Notes on contributors

The Population Health Innovation Lab is based in the Faculty of Public Health & Policy at the London School of Hygiene & Tropical Medicine. We use insights from epidemiology, economics, sociology and geography to understand and change the social, economic and environmental system drivers of population health. The team has particular expertise in diet and physical activity and are using findings from our research to test and evaluate policies and interventions that have the potential to improve urban health at the population level.

ORCID

Steven Cummins  <http://orcid.org/0000-0002-3957-4357>

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