

WHAT IS IT?...

... THAT INCREASED
IN PRICE 23%
BETWEEN 1977 - 1978

THAT THE BRITISH
PUBLIC BUY ELEVEN
MILLION OF
EVERY DAY

THAT THE BRITISH PUBLIC
THINK HAS GONE DOWN
MORE IN QUALITY THAN
ANY OTHER FOODSTUFF

IS A PRODUCT
CONSISTING LARGELY
OF AIR AND WATER
WITH 28 CHEMICALS
ADDED - SOME
POSSIBLY HARMFUL

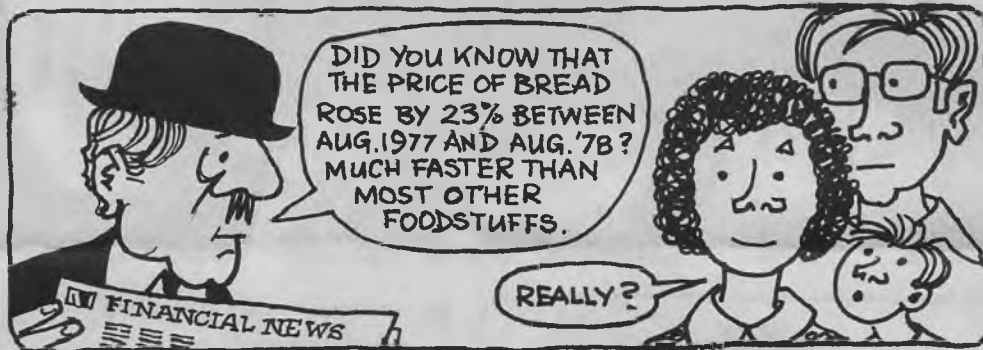
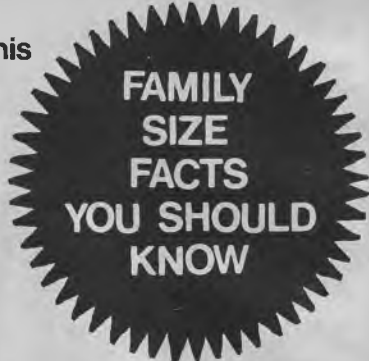
IS MADE IN AN INDUSTRY
WITH ONE OF THE WORST
ACCIDENT RECORDS
AND LOWEST WAGES

IS THE MOST PROFITABLE
ITEM SUPERMARKETS SELL
(FOR THE ROOM IT TAKES UP
ON THEIR SHELVES)



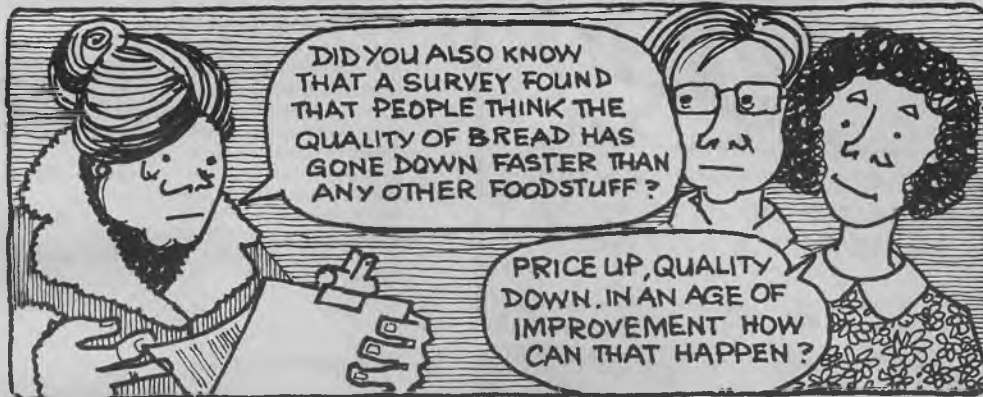
It's **WHITE SLICED WRAPPED PROCESSED BREAD**

Let's take a look at this bland, waterlogged substitute for the real thing ... and the industry that sells it to us



PRICE RISES

In over 300 years from 1600 to 1939 the price of bread just doubled ("Story of Bread" - Sheppard & Newton, 1957), in the 39 years since then the price has risen 18 fold. According to **Department of Prices and Consumer Protection** bread has risen faster in price over the last few years than most other foodstuffs - going up by 23% from August 1977 - August 1978.



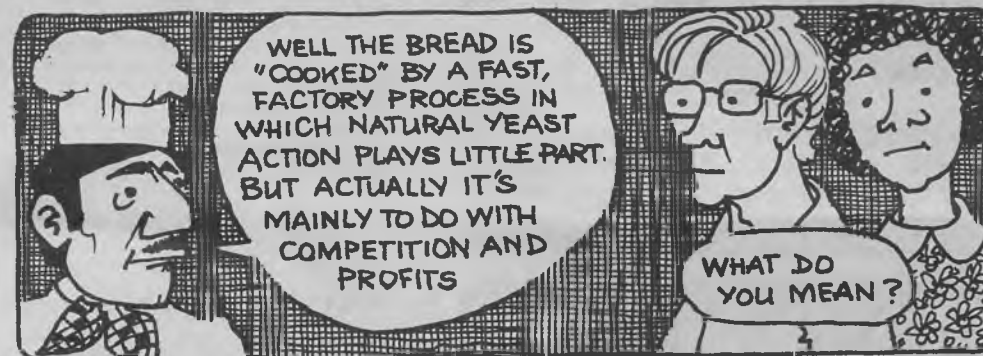
QUALITY

Bread is the single most important food in the U.K. diet - giving us about 15% of our energy and 16% of our protein (**National Food Survey 1976 Table 21**). It is an even more important ingredient in the poor family's diet. Yet according to public opinion, bread is the foodstuff that has gone down more in quality than any other food. (**National Nutrition Survey of the Margarine and Shortening Manufacturers Assoc. Table 10 1969**). Experts such as the head of the Food Technology department of Birmingham's College of Food, agree that the manufacturers do not consider the nutritional value of their products to be of prime importance.



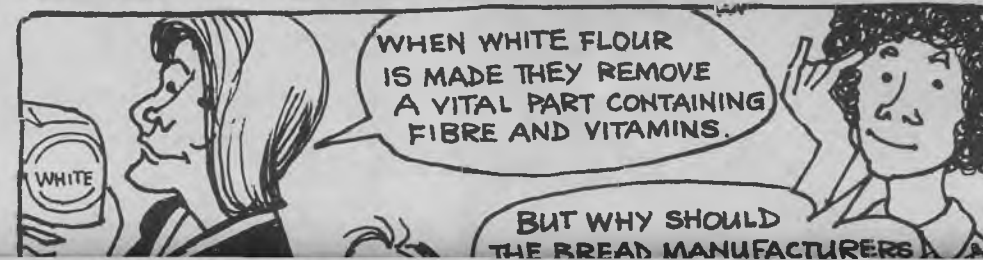
THE BIG THREE - OR IS IT TWO?

Until recently three companies controlled 62% of the U.K. baking industry (**Monopolies and Mergers Commission Report "Flour and Bread", 1977**). These companies and their pre-tax profits were: Associated British Foods (ABF) (£78M in 1978), Rank Hovis McDougall (RHM) (£39M in 1977), and Spillers French (£8M in 1978). In April '78, however, Spillers pulled out of baking, selling 13 bakeries to the other two giants and closing down 23 bakeries (**Spiller's Annual Report 1978, Supplement**) at the cost of 6000 redundancies. One of the results is dearer bread for the consumer.



THE BAKING PROCESS

In 1961 the Chorleywood Bread Process was introduced and this revolutionised the bread industry. The traditional several hour rising of the dough by natural fermentation was replaced by a few minutes of intensive mixing with a pre-fermented gruel of yeast, oxidising agents, emulsifiers, yeast 'nutrients' and other ingredients. Three quarters of our bread is now made in this way. The manufacturers like it, because it is not only faster but, since more water can be included, it stretches the flour further (**The Monopolies and Mergers Commission Report, 1977** stated that the same quantity of flour stretched 4% further using this process. Since then the quantity of water in the standard loaf has risen to a record 40% - (**Composition of Foods, 4th edition H.M.S.O. 1978**).



MILLING AND BAKING LINKS

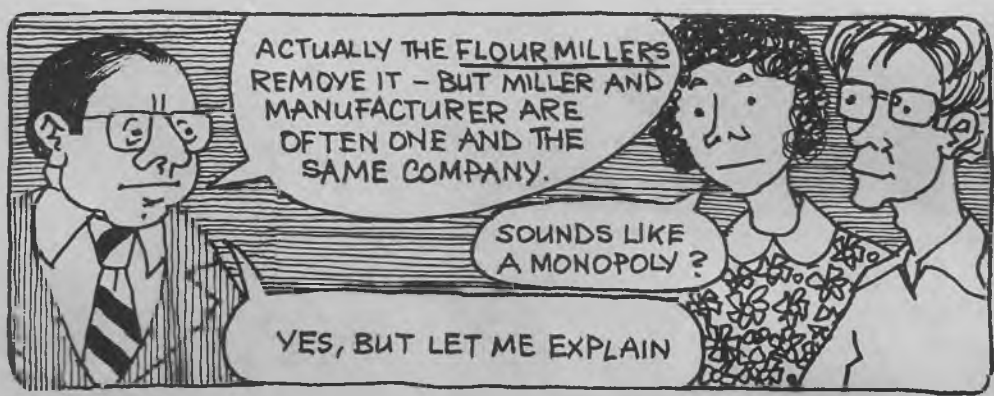
The three big companies in the bread industry also control the flour supply.



BUT WHY SHOULD THE BREAD MANUFACTURERS WANT TO REMOVE IT?

► MILLING AND BAKING LINKS

The three big companies in the bread world (see above) are also giants in the manufacturing of flour. Between them they mill 80% of U.K. flour (**Monopolies and Mergers Commission Report, 1977**). But their involvement with wheat does not stop there. Ranks and Spillers, together with Unilever and four other corporations control over 60% of the animal feed market ("**Cereals in the U.K.**" - D. K. Britton - Pergamon Press). The wheat germ and bran, taken off in the milling of wheat, is a major ingredient in this £1.7 billion market (1976/77 figure). The bread giants are also big in other food, farming and finance business, but more about this later.



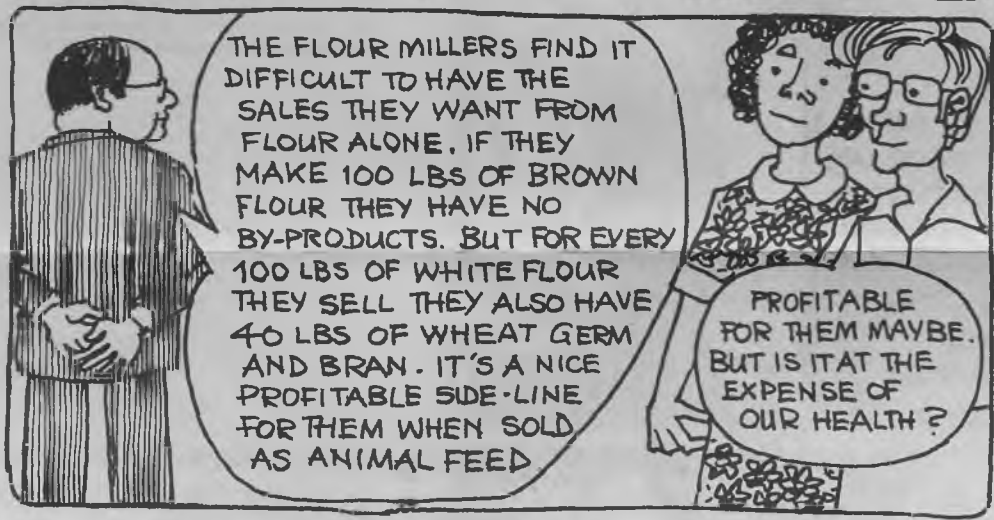
ACTUALLY THE FLOUR MILLERS REMOVE IT - BUT MILLER AND MANUFACTURER ARE OFTEN ONE AND THE SAME COMPANY.

SOUNDS LIKE A MONOPOLY?

YES, BUT LET ME EXPLAIN

► FLOUR AND BREAD SALES

We eat less bread today than our parents did. By 1976 the home consumption of bread and flour was only two thirds the 1956 figure (**National Food Survey 1976**), and this downward trend has been with us for at least 200 years. No industry, however, likes a declining market - especially when it controls the major portion of that market. So for the bread giants - which have squeezed out most of the competitors - the only solution is to move into other markets.

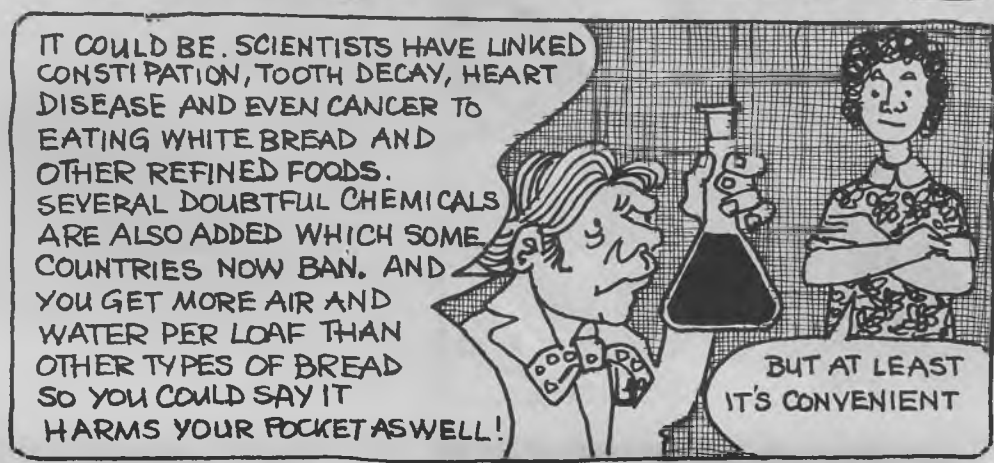


THE FLOUR MILLERS FIND IT DIFFICULT TO HAVE THE SALES THEY WANT FROM FLOUR ALONE. IF THEY MAKE 100 LBS OF BROWN FLOUR THEY HAVE NO BY-PRODUCTS. BUT FOR EVERY 100 LBS OF WHITE FLOUR THEY SELL THEY ALSO HAVE 40 LBS OF WHEAT GERM AND BRAN. IT'S A NICE PROFITABLE SIDE-LINE FOR THEM WHEN SOLD AS ANIMAL FEED.

PROFITABLE FOR THEM MAYBE. BUT IS IT AT THE EXPENSE OF OUR HEALTH?

► SCIENTIFIC TESTS

Nutritional experts are becoming increasingly concerned that our health may be suffering from eating too much refined food and not enough roughage (such as the bran in wholemeal bread). This lack of dietary fibre, it is thought, is linked to degenerative diseases (such as diabetes, heart disease and cancer) ("**Refined Carbohydrates and Disease**", D. Burkitt and H. Trowell). The British loaf is also the most chemicalised loaf in Western Europe ("**Bread**" - TACC report - Intermediate Publishing 1974). 24 additives and 4 nutrients are permitted in white bread (**Food Standards Committee second report on Bread and Flour, 1974**). Some of these chemicals are not fully tested. Butylated Hydroxytoluene, for instance, has been linked to liver disease (**Brown et al., Austr. J. exp. Biol. med. sci. 37 533 1959**) and is banned in Sweden and Australia but is still a permitted ingredient in baking fats.

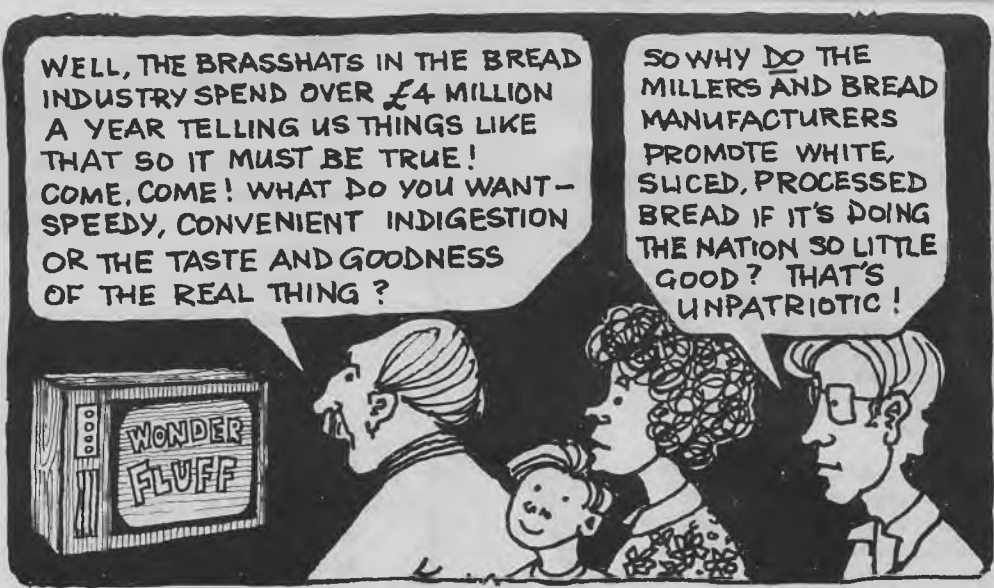


IT COULD BE. SCIENTISTS HAVE LINKED CONSTIPATION, TOOTH DECAY, HEART DISEASE AND EVEN CANCER TO EATING WHITE BREAD AND OTHER REFINED FOODS. SEVERAL DOUBTFUL CHEMICALS ARE ALSO ADDED WHICH SOME COUNTRIES NOW BAN. AND YOU GET MORE AIR AND WATER PER LOAF THAN OTHER TYPES OF BREAD SO YOU COULD SAY IT HARMS YOUR POCKET AS WELL!

BUT AT LEAST IT'S CONVENIENT

► ADVERTISING

In 1971 the bakeries spent £2.8M and the millers spent £1.3M on advertising in the domestic media (**Media Expenditure Analysis Ltd.**). Admittedly about £1M of the £4.1M total bought advertisements for brown products, but a good deal of commercial brown bread owes its brown-ness more to the added caramel than to wheat germ and bran. In August '78 the bread industry announced its decision to launch a massive public relations campaign, costing about £1½M per year, to give themselves a better image. (**Financial Times - 10/8/78**).



WELL, THE BRASSHATS IN THE BREAD INDUSTRY SPEND OVER £4 MILLION A YEAR TELLING US THINGS LIKE THAT SO IT MUST BE TRUE! COME, COME! WHAT DO YOU WANT - SPEEDY, CONVENIENT INDIGESTION OR THE TASTE AND GOODNESS OF THE REAL THING?

SO WHY DO THE MILLERS AND BREAD MANUFACTURERS PROMOTE WHITE, SLICED, PROCESSED BREAD IF IT'S DOING THE NATION SO LITTLE GOOD? THAT'S UNPATRIOTIC!

WONDER FLUFF

BUT GROWING AND MILLING WHEAT AND MAKING BREAD HAVE NOTHING TO DO WITH PATRIOTISM. JUST PROFITS! - OFTEN ON AN INTERNATIONAL SCALE.



BUT AT LEAST PROFITS MEAN A HEALTHY INDUSTRY AS FAR AS THE PEOPLE IN IT ARE CONCERNED?

6/25/78



INTERNATIONAL CONTACTS

Wheat is the world's most traded commodity. Some two thirds of all wheat exports the world over are controlled by five U.S. giant corporations. The largest, Cargill, with its \$9 billion per year sales, even uses satellites to monitor the world's grain harvests (*'Science for People' 1976/7*). The three U.K. bread giants also have an international outlook. A.B.F. operate in 10 other countries, Spillers in 19 and R.H.M. in 16. These countries include Rhodesia, South Africa, Argentina and Iran (*"Who Owns Whom" 1977*);

FARMWORKERS' EARNINGS

Farmworkers are "by a fair margin the lowest paid body of workers of significant size in the country" said the National Board of Prices and Incomes in 1969 (*Report No. 101 Cmnd. 3911*). Since then the *real* value of farmworkers' wages has fallen steeply (*Low Pay Unit report Nov. 1975*) today's basic wage standing at £45.70 (*New Earnings Survey April '77*).

BREAD WORKERS' EARNINGS

Wages in the bakeries are not much better either. Workers are usually paid just over £1 per hour - including on night shifts - and they have to do 12 hour shifts. To earn a national average wage they need to work about 60 hours per week. Their basic wage is £50.50 as compared with the national average wage for a shorter working week of £71.80 (*New Earnings Survey April '77*).

HEALTH AND SAFETY AT WORK

Work in the mills is one of the most dangerous jobs in industry. There are about 50 reported accidents per year per thousand workers as compared with 35 in all manufacturing and construction industries (*Chief Inspector of Factories Report 1973*).

A survey of bakery workers in Yugoslavia (where bakery dust levels are more strictly controlled than in the U.K.) showed that the incidence of bronchitis was considerably higher than average ([1] See below). No such survey exists in Britain but it is known that bakery workers are more prone to skin allergies and tooth decay ([2] and [3] See below). The other dangers in bakeries are slippery floors, heat and fast moving machinery (*Guardian 14/9/'78*). Noise levels, too, are frequently above the maximum recommended by the **Health and Safety Executive**.

[1] Valic F. et al. Lijecn. Vjesn. 1971 Vol 93

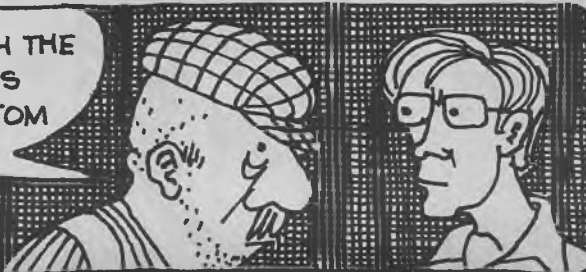
[2] Gerdemin V. and Litter T. Zbl. arbeitsmend 1972 Vol 22

[3] Herxheimer H. Acta Allerg. (Kbh) 1973 Vol 28

PRICING

A trade survey in 1973-4 by **United Biscuits (UK) Ltd** showed that wrapped bread and packaged cakes brought in 14% of the supermarkets' gross profits but only took up 7% of the shelf space - by far their most profitable lines (*Monopolies and Mergers Commission Report 1977*)

NOT TRUE! TO START WITH THE BRITISH FARMWORKER IS OFFICIALLY AT THE BOTTOM OF THE HEAP IN TERMS OF PAY.



AND IN THE BREAD INDUSTRY WAGES ARE ALSO AT ROCK BOTTOM. IN SOME PLACES ONLY £1 AN HOUR. THAT MEANS WORKING 60-70 HOURS A WEEK TO EARN THE NATIONAL AVERAGE.



BUT THEY WORK IN GOOD, CLEAN, MODERN CONDITIONS, DON'T THEY?



NO! IN THE 'BREAD FACTORIES' HIGH-SPEED, AUTOMATED EQUIPMENT IS VERY NOISY - OFTEN ABOVE GOVERNMENT RECOMMENDED LEVELS - DUST ENDANGERS THE LUNGS AND IT'S HELLISH HOT.



NOT SURPRISINGLY THE INDUSTRY HAS ONE OF THE WORST ACCIDENT RECORDS IN THE COUNTRY.



BUT SUPERMARKETS SELL THIS BREAD. DO THEY KNOW ALL THESE FACTS?

CERTAINLY THEY DO! BUT COMPETITION BY MANUFACTURERS TO SELL BREAD THROUGH SUPERMARKET CHAINS MEANS THAT SUPERMARKETS CAN DICTATE THE PRICE THEY BUY AT. SO BREAD BECOMES BY FAR THE MOST PROFITABLE ITEM ON THEIR SHELVES (FOR THE ROOM IT TAKES UP). ... AND OFTEN THE MANUFACTURERS OWN THE SUPERMARKETS ANYWAY.



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BY THE WAY, THE BREAD MAKERS ARE EXPANDING INTO OTHER FOOD INDUSTRIES!

SO, BASICALLY, WE'RE SAYING THAT WE'VE GOT AN INFERIOR PRODUCT WHICH COULD DO US HARM, SOLD AT AN INFLATED PRICE BY AN INDUSTRY THAT PUTS PROFITS BEFORE PEOPLE AND WHICH CONTINUES TO EXTEND ITS TENTACLES INTO OTHER FOOD AREAS



BUT WHAT ON EARTH CAN WE DO ABOUT IT?

This is what you can do ...

- ★ Vote with your purse. Say NO to the waterlogged, tasteless, chemicalised loaf wrapped up in its nice plastic bag. Look around for wholemeal and wholesome bread. Encourage your local bakers to make sure there's plenty of it on their shelves.
- ★ Read this leaflet carefully. There's more, if you like, in our report — "Our Daily Bread" (cost 60p incl. postage). Talk to your friends about it — bring it up in your Women's Institute meeting, your union meeting, in the pub or club ... even write to your M.P. Be prepared to seem a crank if necessary. If it's idiotic to care about our own and our children's health — about heart disease and cancer — then most of us must be idiots!
- ★ Join our Food watchdog brigade. Keep your ears, eyes and tastebuds open to find out the 'cons' we're persuaded to buy; about bad working conditions and pay anywhere in the food business. Do *your* bit by keeping *us* informed.

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EXPANSION OF THE BREAD GIANTS

The expansion of the Big Three bread and flour companies has taken them a long way from bread. Not only have they cornered the wheat trade from beginning to end — starting with fertilisers and other agricultural sales, ending with owning the supermarkets in which the bread is sold (A.B.F. own Fine Fare etc.). But they have also moved into diverse other business fields including pet foods, biscuits, crisps, cakes, meat pies, pasta, tea, meat, milk, eggs, poultry, catering, finance companies, property investment, insurance and storage. (**Who Owns Whom 1977**).

THE AGRICAPITAL GROUP

... is about turning over ground. Turning over ground and digging up the facts that the food industry would prefer to leave buried. Our objectives are:-

- Good food for the people
- Good pay and conditions for food workers

We need your help and your information — so please write to —

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