



Marketing the ‘Slippery’ Local with the Contrived ‘Rural’: Case Studies of Alternative Vegetable Retail in the Urban Fringe of Nagoya, Japan

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[Paper first received, 24 July 2009; in final form, 4 May 2010]

Abstract. In recent years, a wealth of research has been conducted on alternative food economies and the construction of quality in markets in North America and Europe. Nonetheless, research undertaken from these perspectives on food networks in the Japanese context remains relatively unexplored. As the definition of quality is rooted in the social, political and economic contexts of particular places, understanding its construction requires empirical studies on actual alternative food economies in Japan. In efforts to partially address this gap, this article focuses on how re-embedded and possibly appropriated alternative food economies (re-)valorize and then combine ‘locality’ with ‘rurality’ in farm product retail outlets in the Nagoya urban fringe. The authors conducted a series of interviews with retailers who source ‘locally’ produced vegetables from outside the Central Union of Agricultural Co-operatives to assess their goals, supply strategies and marketing images. The semantics of ‘local’ was found to be highly malleable based on retail imperatives, but its visualization through the photographic depiction of farmers was found to be a salient element in the construction and marketing of ‘quality’ to consumers.

Introduction

This article explores the construction of quality in alternative vegetable retailing in the urban fringe of Nagoya in Japan. To this end, the article first draws from the literature on alternative food economies and social embeddedness in the Western

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context to construct a theoretical framework. With this established, the article then shifts to delineate recent post-productivist trends in Japanese fringe agriculture, with particular emphasis on the specific social, political and economic conditions affecting Nagoya. Finally, as case-studies, the goals, supply distance ranges and point of purchase images of five dissimilar retail outlets on the fringe are extrapolated to illustrate a more uniformly employed, but complex, often contrived, re-embedding of communities into alternative Japanese food economies as a distinctive marketing strategy. More generally, this article also explores retailer-forged relationships between producers and consumers based in strategically manipulated constructions of quality and trust within the context of alternative Japanese vegetable retailing. The findings of this study in turn elicit questions about the success of previous policy advocacy for this post-productive shift and ultimately the trajectory of fringe agriculture in Japan.

Alternative Food Economies and Social Embeddedness in the Western Literature

Recent explorations by researchers in North America and Western Europe have greatly contributed to our understanding of the development, maintenance and promotion of alternative food economies and the construction of quality in the marketplace. Many of these studies have centered on social and economic transitions away from productivist systems to those arguably post-productivist (Benediktsson, 2001; Evans et al., 2002; Mardsen et al., 2003; Watts et al., 2005). While precise definitions remain the subject of debate, post-productivist systems are often symbolized by changes in policy to stimulate endogenous development, and forged by social and/or political motivations to promote organic or ecological farming, counter-urbanization, the consumption of the countryside and the diversification of farm activities (Ilbery and Kneafsey, 1999; Benediktsson, 2001; La Trobe, 2001; Dowler and Caraher, 2003; Wilson and Riggs, 2003; Watts et al., 2005).

These alternative food economies serve in direct contrast to the industrial agriculture of productivism as they are typically designed to reconnect consumers, producers and food in new economic spaces, (re-)forging and then promoting ties to a particular place and in so doing reuniting community and encouraging economic viability (De Lind, 2002; Parker, 2005; Watts et al., 2005). Conventional and typically globalized distribution networks and chains are spurned in favor of community or place-based production and consumption rooted in interconnected yet semantically ambiguous buzzwords such as 'trust' and 'locality' (Watts et al., 2005; Venn et al., 2006).

Likewise, many of these alternative food economies exemplify the rise in quality of food production and distribution, linked not only to environmental concerns but also to consumer health and responsible citizenship. Studies to this end have included the expansion of organic and ecologically friendly production (Ilbery and Kneafsey, 1999; Morgan and Murdoch, 2000) and the branding of commodities (Ilbery and Kneafsey, 1999, 2000; Murdoch and Miele, 1999; Holloway and Kneafsey, 2000).

Moreover, the construction of quality also includes social-cultural components and is subject to adaptation and renegotiation over space and time (Winter, 2003b).

More recently, many academics have begun to conceptualize alternative food economies and the oft-associated shift towards quality production through the perspective of embeddedness (Hinrichs, 2000; Murdoch et al., 2000; Winter 2003a, 2003b; Hinrichs et al., 2004). Embeddedness is concentrated on the social relations existent in the direct and ongoing interactions between participants in economic transactions (Granovetter, 1985; Murdoch et al., 2000; Hinrichs et al., 2004; Kirwan, 2004). As food production and distribution is re-embedded in an alternative food economy, a more direct exchange between actors generates trust. Moreover, as many alternative food economies are often founded or driven by an erosion of public confidence in larger scale farming and modern food distribution chains both in terms of food safety and environmental damage (Morris and Young, 2000; Murdoch et al., 2000; Kneafsey et al., 2004; Moore, 2006), the importance of establishing some variants of trust between producers and consumers takes on added importance in the marketplace.

Indeed, research on alternative food economies in the West often links the spatial scale of production and distribution to forms of trust and, ultimately, to conceptualized constructions of quality production. In effect, conceptualizations of embeddedness then support 'locality' as a decisive element in the creation of some forms of trust, which for consumers is in turn often re-linked to conceptualizations of healthiness and/or quality (Murdoch et al., 2000; Archer et al., 2003; Youngs, 2003; Hinrichs et al., 2004; Watts et al., 2005). Therefore, the concept of 'locality' assumes added importance in explaining the re-embedding of food systems, particularly as markets occur within specific regional and community contexts and are shaped by the socio-cultural mores of particular places.

According to Morris and Buller (2003), the expression of this 'locality' can be manifested in two general patterns. The first of these centers on closed systems, where food is 'produced, processed and retailed within a geographically circumscribed area and defined in various ways as local (2003, p. 559). The second is through locality for value added export, where products are distinguished through labeling, certification, etc., as originating from a distinct geographical location and/or within distinct production standards (Ilbery and Kneafsey, 1999, 2000; Murdoch et al., 2000; Morris and Buller, 2003). Within these contexts, 'locality' provides a spatial and social alternative to conventional agricultural commodity distribution networks, possibly improving the flow of information between producers and consumers and improving food traceability in the process (La Trobe, 2001; Morris and Buller, 2003; Renting et al., 2003; Watts et al., 2005).

The quintessential example of this trend to revalorize the local is the growth in farmers' markets, typically explored in the literature not only as a place of social learning and entrepreneurial business development, but more importantly here as an archetypical means of re-embedding community into food production, with geographical and/or direct closeness and social interaction between producers and consumers linked to trust and the construction of quality (Hinrichs, 2000; Holloway and Kneafsey, 2000; La Trobe, 2001; Brown, 2002; Archer et al., 2003; Hinrichs et al.,

2004). Beneficially, farmers' markets provide spaces for community interaction, preservation of rural character, employment opportunities, possible tourist attractions, and sources of income for the predominantly part-time farmers who typically retail at the markets (Brown, 2002; Hinrichs et al., 2004).

Nonetheless, research undertaken from the perspective of embeddedness and the construction of quality in food networks remains relatively unexplored in the Japanese context (Iga, 2006). While two recent exceptions include a study on quality construction in miso (soybean paste) in supply networks of locality-based industries (Iga, 2007) and the fabrication of local embeddedness in the branding of beef (Takayanagi, 2007), considerable gaps in the literature exist. As the definition and conceptualization of quality is rooted in the social, political and economic contexts of particular places, understanding its construction within the Japanese context requires empirical studies on alternative food economies centered on quality *in Japan*. In efforts to partially address this gap, the narrative of this article now shifts to focus first on the characteristics of Japanese agriculture in fringe regions more generally before shifting to explore specific national, regional and local policy changes affecting the spaces of agriculture and agricultural retail in the Nagoya fringe. With this established, a series of vegetable retail outlets are explored as contrasting case-studies to determine how re-embedded and often appropriated alternative food economies construct 'quality' in the region. This study asks if 'quality' in Japanese farmers' markets entails distinct definitions of trust and, if so, how it is constructed and negotiated. Overall, this study contributes to our understanding of the dynamics of retailer-producer-consumer linkages and their relation and significance to the creation of 'locality' in Japanese agricultural retail spaces.

Agriculture and the Japanese Urban Fringe

The long and downward spiral of importance of agriculture to the Japanese economy is well documented in the popular press and academic literatures. Contemporary Japanese farmers produce less than 40% of the country's total caloric intake (Ito, 2004). Smaller scale family operations, run by predominantly part-time farmers on disconnected fields, have difficulty competing with lower cost imports (Godo, 2001; Nagaki, 2002). Likewise, as farmers age, the lack of interest and availability of successors has resulted in farm abandonment and depopulated rural spaces (e.g. Kumagai, 1996; Morimoto, 1996; Nakajima, 1996; Japanese Statistics Bureau, 2000; Morimoto, 2001; Nagaki, 2002; Kitahara, 2004).

Agricultural production in the Japanese urban fringe perhaps embodies many of the most undesirable characteristics of this decline, in particular as it represents both a more advanced stage in the transition between land uses as well as spaces that are highly contested between various stakeholders for political and economic control (Sawa and Takahashi, 1996; Takahashi and Sawa, 1996; Yamamoto, 1996; Kikuchi and Cui, 2001; Kikuchi et al., 2002). According to Hebbert (1994), legislation such as the 1968 New Urban Planning Act exemplifies Japanese planning policy as one of seeking to control rather than contain urban expansion. That is, little impetus is placed

on dividing rural and urban spaces, resulting in the emergence of fuzzy spaces (i.e. sprawl). Linked to disordered development and legislation encouraging non-agricultural land use, this has left a highly fragmented conversion of fringe land, leading to patchwork landscapes of industrial, commercial, residential and agricultural use (Mori, 1998; Wiltshire and Azum, 2000; Isoda et al., 2001; Saizen et al., 2006). Typically, periods of high economic growth have been found to reduce agricultural land within urban fringe areas, particularly as land owners converted land to other uses, left it fallow to concentrate on income generation elsewhere, and/or simply retained the land in speculation of the potential for future lucrative rezoning (McDonald, 1997; Isoda et al., 2001; Kikuchi et al., 2002; Saizen et al., 2006). Overall then, urban fringe areas typically have higher percentages of part-time farmers than more rural spaces (Kikuchi et al., 2002).

Alternative Food Economies in Japan

Since World War II, agriculture in Japan has been shaped by the considerable economic and political power of producer and consumer co-operatives. The majority of farmers join their local producer co-operative, linking them to the larger umbrella network of the Central Union of Agricultural Co-operatives (i.e. JA). JA supplies farmers with a complex range of services including an outlet to distribute their agricultural production (Sakamaki, 1996a; Godo, 2001; Parker, 2005). JA is typically an imperative distribution outlet for farmers producing quantities too small for larger distribution contracts, percentages of which have increased in correlation to the growth in off-farm incomes (Godo, 2001). JA then compiles commodities from various sources for redistribution along a longer distribution chain to more distant retail outlets. This process naturally occurs at a price to the farmer, who if interested and able to bypass the margins charged by JA can reduce costs and increase profits. From the mid-1990s onwards, however, government policies of economic liberalization have increased competition with JA's banking and insurance operations, greatly eroding its financial base. As a result, JA has reformed structurally to reduce its number of employees and consolidate many of its smaller offices. From an agricultural perspective, this has in turn reduced its political influence and overall effectiveness (Godo, 2001).

The Japanese consumer co-operative movement can be linked directly to models of the Rochdale Co-operative of late-nineteenth century England. According to Moen (2000), these early movements were based on idealistic principles including equitable distribution of economic surplus, open membership and democratic control. By the 1960s, Japanese consumer co-operatives often interwove growing concerns of food safety with critiques of the excesses of capitalism, attempts to transform agricultural production practices and/or promote relations between farmers (Sakamoto, 1996; Moen, 1997, 2000; Parker, 2005; Miyachi, 2007).

According to Moen (2000), co-ordinated movements between various interest groups allowed Japan to develop one of the more politically active and developed consumer movements in the world. As such, consumer co-operatives played a promi-

ment role in the creation of alternative Japanese food economies. Moen's own study then focuses on the idealistic Japan Consumers' Cooperative Union (i.e. Seikyō) movement, which in 1990 operated over 2,400 retail outlets supplying locally produced products based on its own rigorous environmental production and health standards (Moen, 2000). This included both direct and mail-order retail of biodegradable cleaning supplies and ecologically grown foods. As a grass-roots movement, Seikyō was designed not only to increase the scope of direct marketing between producers and consumers, but also ultimately to encourage environmental protection and the prevention of farm abandonment (Moen, 1997, 2000).

Overall, Moen's study is one of many illustrating tendencies of post-productivism in various areas of Japan. Some have linked conceptualizations of the multifunctionality of rural spaces with community-based agriculture and development (Takahashi, 2001; Ohe, 2006), while others have explored regions with farmers specializing in niche markets (e.g. organic production, low input sustainable agriculture, grow-to-order vegetables), and/or alternative distribution outlets (e.g. Internet store fronts, direct sales to restaurants, CSAs) in various regions in the country (Mizushima, 1996; Sakamaki, 1996b; Sakamoto, 1996; Moen, 1997, 2000; Tabayashi and Waldichuk, 2004; Kohmoto, 2005; Parker, 2005; Iga, 2006; Miyachi, 2007). Conceptualizations of an arguable post-productivist countryside have also included the branding of pork products to reinforce connections between the production and retail sectors (Tanno, 2007), concerted efforts to produce local food for local consumption (Koganezawa, 2007) and idyllic connotations of (re-)constructed 'rurality' utilized to add value to land and products as well as an atheistic amenity in more urban environments (Kikuchi et al., 2002; Takahashi and Nakagawa, 2002; Takahashi, 2004).

Policy Redirection and Agricultural Change in the Nagoya Fringe

Nagoya City lies in the center of the Tokai region between Tokyo and Osaka on the island of Honshu (see Figure 1).

With a population of over eight million residents, it comprises the third largest conurbation in Japan. Increasingly concentrated industrial development, centered on the growth of automobile and machinery production following the Second World War, has resulted in the tremendous expansion of the city into its surrounding areas. Thus, the Nagoya fringe, which extends primarily on the largely low-lying Owari Region, has faced ever-increasing pressures of urbanization and sprawl-related land-use changes.

Nonetheless, as a result of government efforts to improve infrastructural capacities for farming and shipping, and its advantageous geographic position between Tokyo and Osaka, Nagoya's urban growth has allowed for the development of active farming in the region. Small-scale, family- and commercial-oriented operations produce an array of vegetables, fruit, flowers, poultry and eggs throughout the region. In 2007, Aichi Prefecture agricultural production sales ranked fifth in Japan, totaling approximately 315 billion yen (\$2.7 billion).¹ Aichi Prefecture's share of agricultural production to Japanese output totals was, for example, 18% for cabbage, 7% for toma-

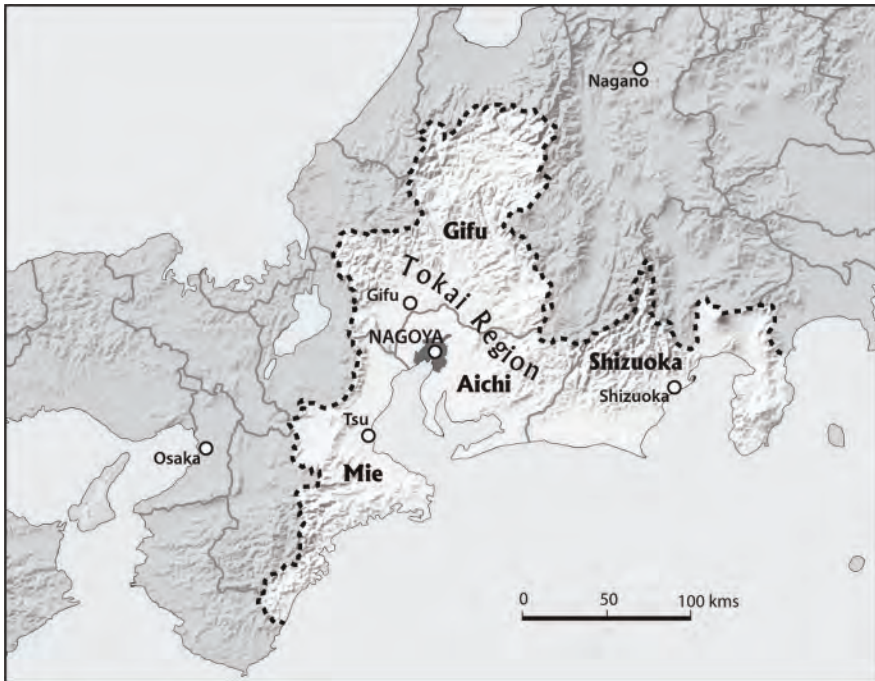


Figure 1: Nagoya City and the Tokai Region

toes, 6% for both strawberry and melon, and 5% for eggs (MAFF, 2007). Thus, Nagoya and its fringe regions are culturally situated closer to an agriculturally productive countryside when compared to the Tokyo and Osaka metropolitan areas. However, especially in the fringe areas of Nagoya, agriculture's progressive social and economic decline in overall importance mirrors the plight of other major conurbations. For example, according to Aichi Prefectural Government statistics, the number of farm households decreased from approximately 51 000 in 1980 to 34 000 in 2000; and the proportion of farm households halved from 13% to 6% during the same period. Likewise, the area of cultivated land fell from approximately 26 000 to 18 000 hectares, with 630 hectares of land being abandoned in 1980, and 960 hectares in 2000 (Aichi Prefectural Government, 2005).

At the national level, urban fringes similar to those around Nagoya City have become a more primary focus of contemporary Japanese domestic agricultural policy over the last two decades.² These policies have shifted increasingly towards the creation of a countryside more post-productivist in nature. In 1999, for example, the Ministry of Agriculture, Forestry and Fisheries (MAFF) completely revised the 1961 Agriculture Basic Act. While this previous legislation stressed the industrialization and modernization of agriculture and the quantitative expansion of domestic food production, the replacement Food, Agriculture and Rural Areas Basic Act posits farm land in a more multifunctional light. In effect, conceptualizations of farm land are now politically constructed not simply as spaces for the production of food, but rather also as a key element in environmental conservation, as a water resource and

as habitat for wild life. Likewise, such legislation also revalorizes the aesthetic qualities associated with pristine landscapes and links them to projects promoting education, history and culture.

More recently, legislation such as the 2002 Promotion of Nature Restoration Act and the 2004 Landscape Act has also reassessed arable land, pasture and forest in environmental and aesthetic terms. These new values and uses now attributed to the agricultural countryside are also expressed in the 2004 Food Education Basic Act. Emphasizing the importance of 'locality' in farm products, this act promotes farming practices that allow urbanites not only access to fresh, healthy and seemingly safe food, but also to learn about the unique natural environments and local culture in their nearby countryside.

In MAFF's agricultural area typology, the Nagoya fringe is classified as a 'close-to-urban area'. As such, more recent regional agricultural policies have been predominantly conservation based or consumer oriented and are best exemplified by the Regional Plan of the Basic Program on Food and a green Aichi Prefecture. Concentrating on the Owari Region, this plan mirrors trends in national legislation seeking to prevent farm-land abandonment and additional urban sprawl, supporting eco-friendly and locality-specific farming practices, expanding local and regional markets for farm products and promoting visits to farms by urbanites.

Similarly, recent local policies have solicited support for such voluntary activities as 'local production for local consumption' campaigns, community-based food processing and food education projects. Each of these programs represent attempts to re-localize agricultural production in the face of an increasingly globalized food system. Thus, these shifts in national, regional and local policies have begun to reposition farmers' markets as pivotal facilities for rural-urban interchange and interaction. Markets are increasingly becoming vital spaces where farmers can sell both their small quantities of produce and home-processed specialties unsuitable for shipping to larger and/or more distant outlets, and to non-farmers living in and around Nagoya who can acquire a more profound understanding of the regions' farming and local specialties.

Japanese farmers' markets are typically founded and/or operated by JA, various levels of government, farmers groups and NGOs. According to MAFF statistics (2008), overall sales at farmers' markets are led by farmers groups and companies, JA-operated enterprises and by the quasi-government/semi-public sector (i.e. the third sector, or in Japanese 第3セクター, *daisan sekuta*). However, research on Japanese farmers' markets tends to focus more on JA's nationwide engagement with retailing (e.g. Ito, 2009).

The increase in both the quantity of and total sales attributed to farmers' markets over the last 20 years has not simply been retailer driven, but has also been heavily influenced/supported by consumer interest and activism. According to a MAFF survey (2007), ideas of freshness, safety, and proximity to the source of production were also more vital to consumers than price. In this context, many private and co-operative supermarkets now operate small farmers' market-like spaces as local food islands (i.e. 産直コーナー, *sanchouku koo-naa*). Nonetheless, the majority of previous

research has not only overlooked these retail trends but also failed to explore notions of quality, locality, and symbolic and/or actual producer–consumer relationships in the diverse array of farmers' markets and related distribution outlets.

An Overview of the Six Markets

This article is based on data collected by the authors in a series of semi-structured, face-to-face, qualitative interviews with retailers employed at outlets in the Nagoya fringe during the summer of 2007 (See Figure 2).

As this study sought to explore the construction of quality in alternative vegetable retailing, outlets targeted for interviews were selected across a variety of retail scales and with hypothesized dissimilar *modus operandi*. In all cases, the respondent(s) of those outlets were chosen based on their familiarity with both the operations and consumers of the associated outlet. Interviews were conducted with five different types of farmers' market retailers: a farmer co-operative, a local government, a third-sector operator, a private supermarket and a co-operative supermarket. The interviews assessed the goals of the retail outlets in providing a local producer–con-

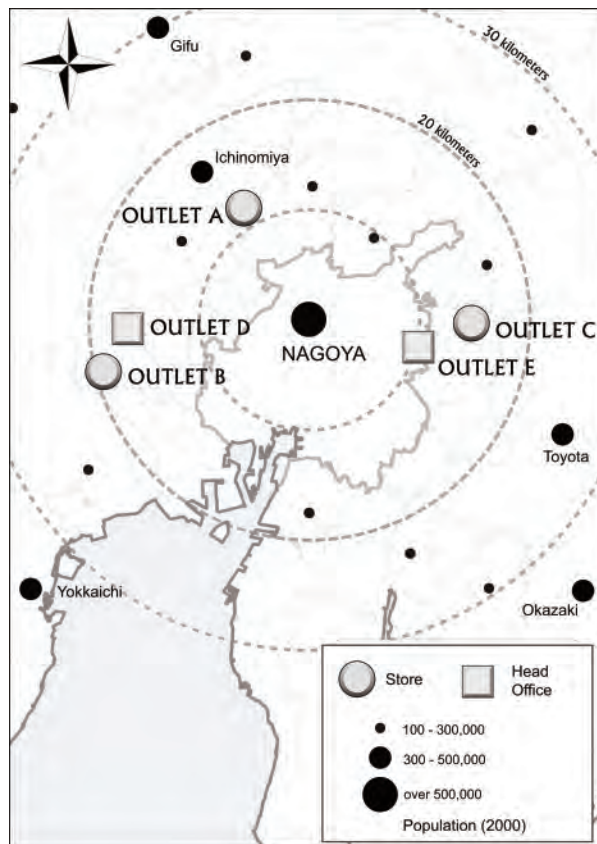


Figure 2: Interview placement on the Nagoya Fringe.

sumer linkage, the distances from which the merchants sourced local products, and the images at the point of sale that represented the local producer–consumer link. The findings on these three points are discussed after an initial introduction of the six outlets about their location, foundation, management, employment, costs, sales and size (summarized in Table 1).

Overview of Outlet A

Outlet A is currently owned and operated by a small farmers co-operative specializing in the production of eggs. The outlet is located in an area of rapidly urbanizing industrial/suburban sprawl on a local road. The co-operative opened a restaurant in 2002, at which time a small market was organized to sell fresh eggs directly to consumers. At this small market, 20 ‘local’ agricultural families (i.e. この辺の地域の農家/地元, *kono hen no chiiki no nouka/jimoto*) provide vegetables daily from 9AM to 5PM. The market charges the farmers a 15% commission on products sold. The market employs more than 10 part-time employees. In addition to eggs and vegetables, regionally produced tofu and processed products from other regions of Japan are offered. The customers are predominantly housewives over 65 years of age from the immediate surrounding area.

Overview of Outlet B

Outlet B is owned and operated by a village government. Located on a prefectural road, the outlet is part of a larger complex that includes a bakery and restaurant. Opened in 2004, the entire complex was accepted into the federal government’s Street’s Station (道の駅, *michi no eki*) programme the following year. The outlet sells local (i.e. 地元, *jimoto*) produce supplied from 34 farm families. Additional products available at the outlet include fruits, rice and processed products grown in other regions in Japan, although no products of any origin are sourced from JA. Roughly 900 customers arrive daily from the local, prefectural and Tokai regional areas by car,

Table 1: General Distinctions between the Surveyed Outlets.

	Founded in	Management	Employees Full/Part	Inclusion of JA Products	Cost to Farmer	No. of Farm Families Supplying	Consumers Origin
Outlet A	1998	Farmers’ co-operative	0/10	No	15%	20	Local, occasional Aichi Prefecture
Outlet B	2004	Village government	0/11	No	15%	34	Local, Aichi Prefecture, Tokai Region
Outlet C	2007	Public company	3/20	Yes	In-town Farmers 15% Others 16%	100	Local, Aichi Prefecture, Tokai Region
Outlet D	2002	Supermarket	Large operation	None in ‘local’ food island	Self-delivery 16% Company trucks 22%	30	Tokai Region
Outlet E	1970	Supermarket	Large operation	>75%	Not stated	Not stated	Tokai Region

many stopping en route to or from more rural areas. The entire complex also receives an average of two tour buses daily, with noted increases on festival days (e.g. Buddha's birthday) and national holidays. The outlet employs approximately 11 part-time workers in addition to office staff. Farmers are charged a flat rate of 15% to sell their products at the outlet.

Overview of Outlet C

Outlet C was opened in April 2007 by initiative from a town hall, although it is currently operated by a third-sector public company. The outlet is part of a larger complex that includes hot springs, a restaurant serving health food and a garden for disabled residents. The outlet is located in a rapidly suburbanizing region, and has managed to source from 20% of a total 400 local farm family households. Over 50% of products on offer at the outlet originate from local sources (i.e. 地元, jimoto), with 30% coming from Aichi Prefecture and 20% from more distant locations. Farmers living in the town are charged a 15% commission while those further away are charged 16%. Customers are mostly from the surrounding middle-class suburban area, although some business is linked to regional hot-spring visitors. According to the town's own survey, over 60% of market customers wish to maintain an agricultural/rural landscape, while over 70% seek active community connections between old and new town residents. The market portion of the complex employs three full-time and 20 part-time workers who operate the business daily from 9AM to 6AM.

Overview of Outlet D

Outlet D was started in 2002 by a regional supermarket chain with a number of distribution points throughout the Tokai region. The outlet is a 5.4m by 90cm local food island (i.e. 産直コーナー, sanchouku koo-naa) within the larger traditionally sourced produce section of the supermarket. This corner advertises and banners being supplied by local (地元, jimoto) producers, with noted seasonal variation stocks mostly tomatoes, lotus root and cabbage. Thirty farm families supply to the corner, which comprises 10% of the entire vegetable sales of the supermarket. Farmers who deliver directly to retail outlets are charged a 19% commission, while those who use the company trucking system to deliver products to the outlet are charged 22%. No outside source of funding was utilized for the start-up or operation of the outlet.

Overview of Outlet E:

Outlet E is the entire regional supermarket chain and mail-order business of the Aichi branch of a larger consumer co-operative founded in 1970 as a grass-roots coalition to exclusively promote local and sustainably produced agriculture (i.e. 地産地消, chisan-chishou). Nonetheless, the market now sources over 75% of its current vegetables through distant JA and international channels. Despite these changes, non-JA

produce from Aichi Prefecture still accounts for approximately \$320 000 per month in sales. As will be shown, Outlet E serves as an interesting counterpoint to the other four outlets in that it represents a highly appropriated version of a once alternative retail vegetable trade.

Motivations for Establishment

The motivations for the establishment of the five outlets explored in the Nagoya urban fringe represent a range of economic, social and environmental interests from a variety of actors. At the very least, however, all of these outlets share a characteristic goal of an alternative food economy as they attempt to source some supply of 'local' vegetables from smaller farmers outside of larger scale distribution channels (e.g. JA). Many of the outlets also incorporate highly idealistic civic-minded impetuses and environmentally progressive objectives in their mandates and operations. The remainder of this section explores the goals of each outlet in turn.

The operation of Outlet A can be classified as being primarily motivated by maximization of profit, particularly as the direct retailing of eggs yields the highest return for the company. Likewise, prior to the opening of the market, customers would regularly request eggs from the factory offices, and the market was designed to reduce these 'burdensome' interruptions. The prime market-floor space is predominantly allocated to the company's fresh egg displays, with only miniscule retail space allocated to the less financially lucrative vegetables. As such, community development or local agricultural or environmental conservation is only a secondary or accidental externality.

Both economic and social reasons contributed to the founding of Outlet B. First, federal legislation to discourage the overproduction of rice (i.e. 減反政策、*gentan seisaku*) has resulted in the increased local cultivation of lotus root. As such, the chamber of commerce proposed the idea for a market to help the local, overwhelmingly small-scale and part-time farmers survive by providing necessary retail outlets. The entire complex is designed around a lotus root theme, with both the on-premises bakery and restaurant incorporating the crop as primary ingredients (i.e. as baking flour and in set lunches). In addition, a wide range of other vegetables is offered.

As mentioned previously, Outlet C is situated in a region undergoing rapid suburbanization. The market was conceived as a means of creating linkages between the new, predominantly younger suburbanite residents and the more established members of the older farming community. Simultaneously, the town government attempted to create a space offering a direct outlet for local farmers producing small quantities, while supplying residents with fresh local food and beneficially maintaining agriculture and green spaces in the town. As such, Outlet C is best classified as being motivated by economic, social and environmental impetuses.

Outlet D was established exclusively to source fresh yet inexpensive vegetables at little risk to the supermarket. The contract is fixed with a percentage of return to the farmer on product sold. If the merchandise is not sold, the supermarket incurs no financial loss. Likewise, shorter supply chains decrease company delivery costs,

allowing for lower prices and higher profit margins. Respondents identified these economic considerations as the primary impetus rather than any social or environmental motivations.

Initially the result of a larger consumer movement in the early 1970s seeking healthy and environment-friendly agricultural commodities, Outlet E originally sold locally produced agricultural products only. Although idealistic at its foundation, increases in scale both in terms of retail space and distribution quantity have resulted in the sourcing of products nationally and internationally. Likewise, expressed changes in consumer demand have resulted in the inclusion of processed foods, name-brand products and non-organic products. As such, while the outlet was founded on social and environmental grounds, it has been appropriated slowly into more dominating economic realities brought on by increases in the scale of its operations and a changing consumer base.

Questions of Supplying 'Locality'³

The second objective of the interviews was to assess the distances from which the merchants actually source their products. The interviews revealed a number of retail-side difficulties in the sourcing of vegetables. In particular, Outlets B, C, D and E expressed considerable concern with maintaining an adequate and diverse supply of vegetables grown in the 'local' area. Despite the variance in quantities demanded by these markets, the management of each outlet showed unique responses to resolving this very real concern.

Despite its recent establishment, Outlet C already faces struggles between its foundation ideals and the realities of the marketplace and paltry local production. As the market is financed primarily by the town government, there is no political will to source vegetables from farmers residing outside of its constituency. Nonetheless, as a high morning demand limits the availability of vegetables on offer for the afternoon, they have begun begrudgingly to source from JA to maintain stocked shelves and their reputation.

Likewise, the larger quantities of vegetables demanded by Outlet D has also caused considerable problems with the maintenance of adequate supplies throughout the day. Management regularly requests that farmers re-harvest in the afternoon and/or have vegetables trucked from elsewhere in the Tokai Region. As expressed by Outlet D respondents, definitions of 'locality' at the local food island also include a seasonal component. While the actual size of the outlet remains the same, the geographic sourcing area broadly widens in non-peak local production periods.

Respondents from Outlet E also expressed difficulty in coping with shortages inherent in 'local' production. Indeed, as the company has increased the scale of its operations, reducing the risk and financial losses from supply collapses has forced extensive sourcing of product from other regions both within and outside of Japan.

Connected to the product supply-demand requirements linked to scale, conceptualizations of 'locality' at each outlet acquire distinct semantic renderings. These meanings are 'slippery' in that they vary both within and between retail outlets

according to demand requirements, seasonality and crop. Table 2 lists each outlet versus their expressed spatial versions of 'locality' in relation to retail demand. As the sourcing requirements increase, so too does the area defined as 'local'.

Visualizing 'Locality' and Linking to the Contrived Rural

The third goal of the interviews was to assess the ways in which the feeling of localness was established through imagery at each market. Each of the five outlets attempted to portray some form of 'locality' to consumers. The primary method consisted of prominently displaying color photographs of the farmer and/or farmer's family next to their own vegetables. For example, above a plastic bin of cabbage would be a large laminated photograph of an elderly farmer standing proudly in a field of harvestable cabbage (often with the name of the farmer displayed prominently). A variation on this theme was the assignment of each farmer with a regular identification number. Finally, the larger and obviously more financially driven outlets regularly use signage advertising the displayed products as, for example, 'local from the suburbs' (地元近郊野菜, jimotokinkouyasai), despite the fact that vegetables are sourced from a much wider geographic area.

However, it is the prominence of the farmers' photographs, names, addresses and/or numbers that serves as one of the stronger means of product differentiation. Respondents often mentioned that from their own discussions with shoppers that consumers recognize the names, faces and/or numbers of farmers, often asking for and making purchasing decisions based on allegiance to a particular producer; thereby linking producer and consumer in a conceptual relationship beyond mere traceability. Outlet E respondents, for example, mentioned that producers are able to communicate with consumers through the photographs. Additionally, Outlet D respondents mentioned that consumers identify with the producers through the photographs, bringing about a feeling of security. Likewise, respondents also mentioned that consumers gave considerable preference to vegetables produced 'locally' (地元, jimoto). The image and numbering systems therefore not only link directly the vegetables to actual people in specific places, but also function advantageously as a form of reassurance and informal and personalized branding for producers. Furthermore, as the farms' addresses may be included (i.e. highlighted) in the labeling or signage, producers are linked not simply to *any* place, but embedded in a particular, identifi-

Table 2: Conceptualized Spatial Versions of 'Locality'.

	Outlet A	Outlet B	Outlet C	Outlet D	Outlet E
Retail Demand	Small	Small-Medium	Medium	Large	Large
Primary Source of Vegetables	Immediate Area/Aichi Prefecture	Village	Town but ever more from entire prefecture	Tokai Region	Tokai Region, Japan, some international
Definition of 'Local'	Immediate Area/Aichi Prefecture	Village	Ideal: Town Reality: Aichi Prefecture	Tokai Region	National

Source: Fieldwork, 2007.

able and 'local' place. The means of visualizing 'locality' by outlet is listed in Table 3. It is also important to notice respondents' direct replies to questions asking what values consumers associate with the photographs.

While the geographic realities and semantic constructions of 'local' are variable, the images employed by retailers are distinctly and uniformly rural in character. Despite the dominance of industrial and suburban landscapes on the Nagoya fringe, photographs of rustic farmers and plentiful agricultural fields are easily associated with rurality by fringe consumers. Further exaggerated by the possibility of meeting farmers during morning set-up and the nostalgic nature of market designs, 'rurality' becomes a commodified, albeit contrived, aesthetic construct. Indeed, it is this often synthetic combination of the slippery local and contrived rural that retailers believe evokes perceptions of safety, trust and ultimately quality to consumers. In effect, this forged relationship between the local and the rural forms a formable mechanism to conceptually re-embed producers and consumers in the Nagoya fringe.

Conclusions

Each of the five outlets in the Nagoya fringe has shown divergent motivations for its foundations and variance in the scale of its operations. Nonetheless, each outlet is linked in its desire to source vegetables from non-JA distribution channels. Overall, all retailers expressed the opinion that the link between trust and safety was connected to notions of 'locality', despite the slippery nature behind its semantic construction. Indeed, 'locality' was found to be highly malleable based on retail scale, yet a vital element in the construction and marketing of 'quality' to consumers. As such, retailers of all scales regularly displayed the names, photographs and possibly addresses of producers to establish them as *real* people, and embed them and their vegetables to particular, albeit it often only constructed, 'rural' places.

Larger scale outlets with more distant semantic renderings of 'locality' signify the creation and development of its more appropriated form. Their utilization of re-embedded production into the 'local' and linked to the 'rural' signifies a commodification of key components of particular alternative agricultural economies primarily for commercial gain. As such, they provide further evidence confirming the importance of and economic success associated with establishing some form of 'locality' in the differentiation of products in the Japanese marketplace. Appropriated, falsified or otherwise miscommunicated by retailers, this marketing strategy

Table 3: The Meaning and Visualization of 'Locality'.

	Outlet A	Outlet B	Outlet C	Outlet D	Outlet E
Product Label/Booth Design	Company	Farmer	Farmer	Company	Company
Current Use of Farmer photographs	Previous Use	Yes/Farmers Choice	Yes/Farmers Choice	Yes	Yes
Use of Farmer Numbering	Yes	Yes	Yes	No	No
What values do consumers associate with the photographs?	Quality	Safety	Freshness, Safety	Freshness, Trust, Safety	Trust

Source: Fieldwork, 2007.

also illustrates the use/abuse of trust as a strategic variable in alternative retail marketing. Likewise, it exploits directly consumer confidence in the supposed 'local' actors involved in vegetable production. In effect, this slippery 'local' represents a highly manipulated relationship between retailers and consumers, something far removed from the ideals of previous generations of Japanese consumer co-operatives and NGO-operated retail markets. Questions about how 'alternative' these newer variations of Japanese farmers' markets are must also be forthcoming. Furthermore, the larger scale adoption of these 'local' and 'rural' narratives partially undermines policy incentives promoting local agriculture and community development. The extent to which these distribution channels are actually re-embedding local production into community on any level other than conceptual is doubtful.

Interestingly, government legislation and/or private certification (e.g. Japanese Agricultural Standard organic certification) or alternative methods of production (e.g. low pesticide production) were rarely mentioned by smaller scale respondents as vital to the construction of quality in their marketplaces. In contrast, the larger retail markets regularly employed these forms of formalized trust to distinguish products from those originating in more mixed JA vegetable sources. This reiterates the difficulty of establishing perceptions of quality in larger scale distribution, and partially explains the appropriation of 'local' and 'rural'.

Finally, this study also found that despite variance in demand, all respondents expressed extreme difficulty in regularly sourcing an adequate supply of vegetables from the Nagoya fringe and/or Tokai regions. First, this practical finding provides strong evidence that consumers regularly seek outlets supplying vegetables with these embedded, local relations with producers. As many retailers were found to fabricate such relations links again to the economic success attributed to their construction. On the other hand, this lack of supply brings into question not only the effectiveness of previous land-use legislations, but also the future of agriculture in these regions. Despite the consumer desire to by-pass traditional retail outlets, 'local' farmers are unable to accommodate the increases in demand. Whether this gradual spatial expansion of 'locality' is further evidence of the continued crisis in Japanese agriculture, or rather, perhaps quixotically, represents the creation of crucial opportunities for farmers within the fringe region remains a question to be answered.

Notes

1. All currency has been converted from yen to dollars based on 2007 average exchange rates (\$1 = 117.048 yen).
2. In contrast, for a detailed look at past legislation affecting agricultural land use in Japan, see McDonald, 1997; Ito, 2001; Isoda et al., 2001; Takahashi, 2001.
3. Various Japanese language terms have been translated as being the semantic equivalent to the English term 'local' (e.g. この辺の地域の農家, kono hen no chiiki no nouka, 地元, jimoto and ローカル, roukaru).

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Local Organic Certification in Northern Thailand: The Role of Discourse Coalitions in Actor-Networks

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[Paper first received, 30 August 2009; in final form, 29 August 2010]

Abstract. An actor-network approach is used to analyse a local organic agriculture network in Northern Thailand. This network is centred around local organic standards developed by discourse coalitions with similar social concerns about organic agriculture. Local standards were developed through the translation of existing, international standards into production processes directly addressing the social concerns by discourse coalitions of farmers, retailers, and consumers, leading to the establishment of the Northern Organic Standards Organization (NOSO). The standards are communicated symbolically to consumers through labels and logos. When applying for national recognition as an organic certifying body through the National Bureau of Agricultural Commodity and Food Standards (ACFS) of Thailand, NOSO found that local standards must comply in total to all International Federation of Organic Agriculture Movements (IFOAM) standards for accreditation. The impasses between local concerns and international policies led to what I call a reflexive translation of the appropriateness of international accreditation for the local organic certifying body, resulting in new policies supporting local concerns addressed by the existing body of local organic standards.

Introduction

This article will analyse the development of NOSO, the Northern Organic Standards Organization, a certifying body located in Chiang Mai province, Northern Thailand. The analysis will seek to answer two key questions in reference to the established organic agriculture commodity networks operating in Thailand, and specifically those operating in Chiang Mai province:

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- How are organic standards translated into a local, certifying institution?
- How are organic standards communicated to consumers?

To answer these questions, the article presents a new methodology for the analysis of organic commodity networks through the concept of 'organic certification'. It is regarded as an ensemble of standards mobilized into a new commodity network by efforts of discourse coalitions of producers, distributors, certifiers, and consumers organized around particular social concerns. The objective will not be to determine what is or is not organic; instead, it will demonstrate that the standards behind the certification, whether they be represented as a label, logo, or specific marketplace addressing consumers' perceptions of the meaning of organic produce, are enough to maintain a local, organic, commodity network. Thus, it is the standards that link the farmer to the consumer, thereby completing the commodity network.

The situation in Northern Thailand allows for a unique method of assessing certification strategies because the problem is about exclusion from the dominant national and international organic certifying bodies by way of incontestable, international organic standards. Unlike situations more suited for analysis with methods such as 'exit-voice-loyalty', the Northern Thai actors involved were not part of an existing institutional network nor were their 'voices' acknowledged by the existing framework of institutions (Hirschman, 1970). In addition, there was no process, neither economic nor political, by which these actors could participate in the existing institutions (Hirschman, 1970, p. 19). The only option available was to join and accept the rules or to be excluded.

It has been well documented that unequal power relations presented by global forces or national governments dominate and, at times, overwhelm local initiative. Often, local communities have few options to assert their wants and needs to the government and its institutions. These communities turn to other forms of local resistance, usually referred to as the 'weapons of the weak'. These are practiced as non-cooperative activities and other alternative methods of resistance (Scott, 1986; Hirsch, 1997; Rigg, 1997). Other studies have shown that communities may empower themselves through a participatory approach, working within the laws, regulations and other forms of governmentality of the nation state (Gupta, 1998; Anan Ganjanapan, 2000; McKinnon, 2003; Agrawal, 2005; Li, 2007). These latter studies describe how local communities can utilize technologies of government made available to them to achieve their own ends, even when the particular technologies have been provided as means of exclusion (Anan Ganjanapan, 2000, p. 195). Whereas these studies demonstrate how government technologies establish and promote unequal power relationships, and how local communities contest these technologies through various forms of co-operation or resistance, they do not explain, however, how new local institutions may arise from contested regulations. Research in political science has found that local power may be found when government regulations are unclear, ambiguous, or inapplicable. It has been proposed that, while institutions have 'the power to define and make definitions stick', ambivalence with institutional directives can 'confound choice', creating a situation whereby individuals will come together to support their own propositions (Hajer and Law, 2006, pp. 252, 257).

This research will apply the actor-network theory to demonstrate how groups of individuals congregate around mutual social concerns, thereby establishing new institutions by identifying specific flows of power between local organizations and government agencies. Actor-network theory is useful to this research because actors become defined through their relationships with each other, and particularly through the intermediaries put into play, these being the technologies, standards, rules, and concerns circulating within the network (Callon, 1991, p. 135; Thrift, 1996, p. 24). Organic farming can be seen as an ordering concept, a 'way of seeing', or interpreting a given phenomenon. An organic commodity network is the mobilization of social concerns, production processes and standards necessary to complete the transaction of agricultural produce from farmer to consumer. The social concerns are framed into a particular discourse through which actors associate themselves and form a coalition. The resulting 'discourse of concerns' becomes an 'identifiable set of practices', these being 'embedded routines and mutually understood rules and norms' by a coalition of actors (Hajer, 2005, pp. 299–302). In this case, social concerns are seen as the discourse (the ensemble of concepts and categorizations) guiding actors in their support for organic farming and agricultural standards (Hajer and Law, 2006, p. 261). Discourse coalitions are defined as 'the ensemble of particular story lines, the actors that employ them and the practices through which the discourse involved exert their power' (Hajer, 2006, p. 45).

This analysis contributes to the above research by applying actor-network theory to explain how a new alternative agricultural network emerges from the mobilization of social concerns of actors dedicated to the establishment and promotion of community-based standards. The use of actor-network theory allows this research to understand how the constellation of statements and rules defining a specific set of organic regulations are framed by a coalition of actors and then translated into institutional practice (Forsyth, 2003, p. 99). Local, certifying institutions, such as the Northern Organic Standards Organization (NOSO), create agricultural commodity networks framed by standards reflecting local values and beliefs concerning safety, security, environment, and social responsibility and set into practice through specific agricultural production processes (Forsyth, 2003). The commodity network organizes around practices arising from discourse.

Contested organic regulations can be identified as specific discourses made up of many individual standards. Organic standards will be treated as 'network objects' in relation to the actor-network theory. These standards will be treated as non-human actants exerting power through their influence on discourse coalitions.

'Actants, such as objects, statements, rules, and even institutions are part of the associations and displacements within a network of practice. Actants can be substituted or associated with other actants in the network. Over time, the original intents or purposes constructing the actant may be completely transformed through continual displacement and re-association' (Latour, 1991, pp. 106–110).

In this study of local organic agriculture regulations in Thailand, local communities around Chiang Mai have established community-based, organic standards for mar-

keting to local consumers, as well as to markets in the wider nation and abroad. The organic commodity network in Chiang Mai can be conceptualized as an assemblage of forces interacting as circulations of power. Power is seen as coming from the organic discourse – that is, from the social concerns of the coalition, the ideals and beliefs supported by the participating actors.

Actor-network theory has been widely used to identify the roles of specific actors in agricultural commodity networks (Whatmore and Thorne, 1997; Raynolds, 2004; Marsden and Murdoch, 2006). However, these analyses have often neglected the role of organic regulatory standards as non-human actants influencing the network – that is, they do not address the power originating from agricultural concepts such as organic production standards and food safety, power that binds people together into actor coalitions. Unlike economic analysis, which monetizes commodities into values such as transaction costs, consumer demand, and price, this analysis envisions the organic commodity network not as objects reduced to simple monetary values, but as social values embedded as agricultural practice into the commodity itself. These commodities are framed as actions, conceptions, production, and circulation by the actors throughout the network (Callon, 2005, p. 186). This is possible because the organic agriculture commodity network is built on specific agricultural practice based on a codified set of standards. The commodity has value because of the discourse embodied in the product. In this case involving Chiang Mai, the market exists because of social concerns promoted by a community coalition of actors for safe agricultural commodities.

A set of rules, such as organic farming, is the result of the mobilization of many human and non-human actants around a set of specific social concerns. The actors develop discursive affinity around many of the standards, upholding each other's arguments and beliefs to support a discourse of agricultural practice acceptable to everyone (Hajer, 1993, p. 47). The social processes involved in framing organic networks include the language used to express concerns, social groupings, the contexts in which they are used, and political power (Forsyth, 2003, p. 91).

Agricultural regulations in Thailand are encumbered by the persistent ambiguity regarding the meaning of the term *organic*. Both third-party certified and unsubstantiated claims of safety, pesticide reduction and chemical-free agricultural products are represented with the same authenticity and authority by producers and distributors in the marketplace. Claims are almost always accompanied by a logo and consumers routinely not only assume that the different certifications are equivalent, but that uncertified products with logos claiming health and safety are also equivalent (Roitner-Schobesberger, 2008, pp. 28, 31–32). Furthermore, studies examining contract relations between producers and distributors, consumer awareness of organic production, or the government's role in expanding organic agriculture do not address the complexity of power relations in organic networks and simply conclude by calling for increased enforcement and better government co-ordination (JICA, 2002; Ellis et al., 2006; Shepard, 2006; Roitner-Schobesberger, 2008). Since Thailand's emerging organic products market is, at best, miniscule in proportion to the

industry as a whole, with less than 1% of Thailand's farm land certified as organic (ITC, 2008), the problem receives little government concern.

Agricultural Commodity Networks

In production-related theories, distribution and consumption of commodities vary from linear analysis to sophisticated multi-scalar approaches examining horizontal as well as vertical linkages (Raikes et al., 2000). Most non-linear theories subscribe to an actor-network approach and describe the influences of differential power relationships between linkages (Goodman and Watts, 1997). Non-linear commodity networks share other commonalities, such as an emphasis on economic and regulatory barriers to control or deny access to markets. What I am suggesting in this article, however, is that organic commodity networks are organized by discourse coalitions supporting the same social concerns. It is through the discourse behind these concerns that power is put into the organic commodity network through practice.

Organic regulations control the production process from the farmer to the consumer (FAO, 2001). Third-party certification establishes the authenticity of compliance. Consumers become informed about certification through labeling and other discursive devices used to communicate the messages and meanings behind the production processes applied. A wide variety of social concerns becomes inscribed into the certifying logo (Vandergeest, 2006). The labeling, and the associated logos, are a direct form of communication between farmer and consumer, representing values such as pesticide and chemical-free production, support of biodiversity, fair trade, and social justice. All of these meanings are codified into the organic standards and given authenticity by certification. The practices used by the various discourse coalitions, verified by a certifying body, are communicated to consumers at the marketplace where powerful network objects (standards), are symbolically represented, and fulfill social, emotional and intellectual needs of consumers.

There are more than 364 different certified organic production standards worldwide. Most of these can be described as locally developed regulations, researched and codified by groups made up of informed consumers, farmers, and academics, as well as government and NGO leaders (Rundgren, 2003). The actors came together to establish discourse coalitions around a set of concerns, beliefs and ideals relating to organic agriculture. Many different standards circulate between the various coalitions, building affinity, binding the actors together through their desire to endorse them. The most important concerns are operationalized when all of the actors involved agree on a set of organic production standards, leading to the establishment of a new, institutionalized, organic commodity network with a locally recognized set of production standards and process of certification and verification. The resulting product enters into a marketplace where conscientious consumers assess the qualities of one organic product with another by comparing the organic agriculture production processes represented by the label. Organic commodity consumers are unique inasmuch as they are willing to pay a premium because of their concerns about per-

sonal health issues as well as their support to particular social concerns (Ellis et al., 2006).

Case Study: The Establishment of Local Organic Standards

In a previous research, I analysed the establishment and acceptance of organic and pesticide reduced standards in Chiang Mai province, Northern Thailand. This situation was intriguing because my preliminary field investigation showed that most Thai people do not distinguish between organic, pesticide-reduced certifications, or even uncertified, surreptitious labeling (Vitoon Panyakul, 2001, 2008; Roitner-Schobesberger, 2008). However, my research in Chiang Mai, as well as other research conducted in Bangkok, showed that consumers perceive the different certifications to represent healthy and safe production processes, though most consumers are not aware of the actual production processes, distinguishing one form of certification from another. Issues of health and safety are important to Thai consumers because of the many reported cases of pesticide contamination of fresh vegetables in Thailand (Vitoon Panyakul, 2002; Shepard, 2006; Wyatt, 2010). As part of this author's filed work, a consumer survey was performed during the months of June and July in 2006 to assess consumer preferences and attitudes about organic and certified safe produce at seven different market venues in Chiang Mai. The market venues represented a cross-section of hypermarkets (Carrefour and Tesco Lotus chains), supermarkets stores, fresh (wet) markets and community markets. A total of 324 consumers were surveyed, ages ranging from 18 to senior citizens. The results of this survey were as follows:

1. Cleanliness
2. Origin
3. Logo
4. Price
5. Taste

Consumers ranked taste and price as much less important as cleanliness, origin and logo, with 76% of consumers ranking cleanliness as the most important attribute of purchasing vegetables (Wyatt, 2010). It should be noted that the term 'origin' (literally translated as 'where it came from') is important because of the dubious quality of vegetables from China, as well as consumers' understanding that some locations produce relatively higher quality vegetables, and thus better flavour. When the same consumers were asked to rank their trust in the government 'Safe Vegetable' logo, the 'Good Agricultural Practices' logo, and the label of the Royal Project Foundation (the largest organic producer in Northern Thailand), there was virtually no difference, with 59%, 58% and 60% of consumers giving high rankings respectively. The ambiguity of the meaning of the term *organic* has allowed many different regulatory standards to be supported by the government, all of which allow limited applications of pesticides (Wyatt, 2010).

Pesticide contamination has been an important issue in Thailand since the early 1990s. Sometime in the mid-1990s, the International Federation of Organic Movements (IFOAM) became active in organizing a series of conferences in Bangkok to promote organic standards and certification. Many Thai civic groups organized to take part in the conferences, including a small group of concerned consumers from Chiang Mai. Thailand's Alternative Agriculture Network (AAN) developed as an umbrella organization to help coalitions concerned about all methods of organic agriculture. The coalition group from Chiang Mai became registered as *Northnet*, to act as the northern umbrella supported by AAN. Members of *Northnet* set out in many directions, relating social concerns and environmental issues to farming practice. Out of all of these efforts came NOSO, led by a medical researcher at Chiang Mai University, which focused specifically on the development of organic agriculture regulations.

Through NOSO, the concerns of consumers, NGO groups, and academics in Chiang Mai became institutionalized. Organic agriculture standards from around the world were evaluated for their applicability to the environmental settings, social concerns, and practical farming needs of Chiang Mai. The coalition kept minutes and published their findings in two annual reports (Maneelert, 1999). Standards for agricultural production processes from each of the external networks were used to create a new set of regulations. The following organic standards were reviewed while establishing NOSO (Thiprad Maneelert, 1999):

- Sweden (KRAV)
- Vermont Organic Farmer of USA (VOF)
- Nova Scotia Organic Growers Association of Canada (NOGAS)
- Independent Organic Inspectors Association in Minnesota, USA (IOIA)
- Biological Farmers of Australia (BFA)
- Japan Organic Standards (JAL)
- Regulations developed by *Northnet*, Chiang Mai, Thailand
- Royal Project Foundation or Thailand's standards
- Standards under development at Chiang Mai University and Mae Jo University in Northern Thailand

The emergence of NOSO can be explained using Latour's conceptualization of object translation. Standards from existing regulatory networks were borrowed, translated and then mobilized into practice.

The combination of exclusionary policies, ambiguity of meaning, and overall relevance to local consumers made the dominant discourse of standards promulgated by international certifying bodies inappropriate for local producers and consumers. It was not that the legitimacy of the standards was in question, but rather the need for outside approval by an external, presumed 'higher authority' became doubted. Once the need to be qualified by an external institution was rejected, the coalition behind NOSO began mobilizing those standards deemed important to establishing an organic commodity network. The actions of NOSO reinforce the concept of network stability through discourse affinity as outlined by Latour:

'And still, we regain the durability of social assemblage, but it is shared with the non-humans thus mobilized. When actors and points of view are aligned, then we enter a stable definition of society that looks like domination. When actors are unstable and the observers' points of view shift endlessly we are entering a highly unstable and negotiated situation in which domination is not yet exerted' (Latour, 1991, p. 129).

Some standards are naturally incontestable for the establishment of international organic standards, such as the use of any toxic chemical pesticides. But many other issues are debated within organic agriculture, such as the types of fertilizers that may be applied, or whether or not to support biodiversity, particularly with the use of non-discriminatory insect and pest traps as practiced by integrated pest management techniques. The discourse coalition that organized around NOSO operationalized its objectives and translated selected external standards pertaining to the use of pesticides and fertilizers, support for biodiversity, fair trade, and social justice.

The standards that most concerned NOSO farmers were those addressing outside contamination through overspraying and irrigation water. The small field size of many farms, ranging from 400 to 3,200 m², made issues such as 2 meter buffer zones untenable (note that a 2 meter buffer zone on an 800 m² plot would result in a loss of 14.5% of productive area). Furthermore, the intricate maze of irrigation canals also made it impossible to prevent the possibility of contamination from irrigation water. In addition, it was determined that consumers were not interested in international, certified regulations concerning pesticides. This appears to have been evidenced more informally than through structured surveys, being based on the opinions and perceptions of the community leaders involved (Thiprad Maneelert, 1991). However, time has proved these perceptions to be accurate inasmuch as the Institute for Sustainable Agricultural Communities (ISAC) community market, established in 1993 and based on NOSO standards, continues to serve a diverse cross-section of Chiang Mai (Wyatt, 2010). Instead, they just wanted assurance that the vegetables produced were safe to eat. Once the standards were approved by the various coalitions involved in 2001, NOSO became chartered as the Northern Organic Standards Organization and began disseminating its regulations for organic farming throughout Northern Thailand through different affiliates, such as ISAC (Chomchuan Boonrahong, 2008). The successful translation of external standards into the local discourse of concerns established 'a shared space, equivalence and commensurability' (Callon, 1991, p. 145). Once the standards were accepted and put into practice, their translations established the network.

NOSO certification gained market share through direct communication with consumers in specialized community markets. At the community markets, where products are sold to customers unpackaged, NOSO standards are not symbolically represented by labels. Instead, the local concept of 'organic' is communicated directly between farmer and customer through face-to-face interaction across tables filled with bulk fruits and vegetables. The NOSO logo is displayed at the farm gate of participating farms. ISAC uses these locations as part of its community outreach programme for field trips, and uses pictures of the farms (and the NOSO signs) in its

literature, sign-boards and web site. ISAC also uses its own logo as part of its labeling of processed organic products, such as seed-oil, soap, honey, and dried foods sold at local retail outlets.

From large-scale commercial , such as soybean farmers and tangerine growers, to small fruit and vegetable farmers, ISAC trains farmers in organic production processes leading to NOSO certification and makes consumers aware of those processes. ISAC presents lectures, cooking demonstrations, and sign-boards on Saturdays at the ISAC community markets. ISAC offers community lectures and reaches out through newspapers, radio and television, promoting its vision of organics, based on NOSO standards. ISAC also engages in international outreach to demonstrate the equivalent of NOSO regulations with known international standards by inviting prospective buyers to see for themselves groups of farmers practicing organic techniques. At the beginning, trust and reputation alone were enough to maintain and extend the local agricultural network. However, everything changed when NOSO approached the Thai national government for international accreditation.

Power and Acceptance

Ambiguity, exclusion, and the pressing need to address local concerns have led to a worldwide proliferation of many different certifying bodies and organic standards. Each standard recognizes a different set of environmental circumstances, and different community and farming practices. Issues such as chain of custody (the ability to trace a product from producer to consumer), land tenure, and overspraying can be controlled through tough corporate purchasing policies and rigorous enforcement. Internationally certified, corporate, organic commodity networks exist within markets capable of paying the high cost of systematized, large-scale, bar-coded production shipped over great distances through elaborate cold chains (Humphrey and Memedovic, 2006). International organic standards, such as the Japanese Organic Standard (JAS), and United States Department of Agriculture assume production processes at a scale far above the capacity of individual farmers or farm groups in Northern Thailand. International organic compliance is practiced in Thailand mainly around the Bangkok area where issues of scale can be overcome by the large agro-industrial infrastructure that has developed and expanded around the metropolis (Eischen et al., 2006; Ellis et al., 2006). Organic Agriculture Certification Thailand (ACT), the organic accrediting body operating mostly in Central Thailand, had received accreditation from the National Bureau of Agricultural Commodity and Food Standards (ACFS) by conforming to all of IFOAM's standards and has been pressuring ACFS to create a uniform standard throughout Thailand (ACT, 2003).

Northern Thai farmers, although certified under NOSO standards, have been excluded from large-scale, international and national markets insisting on international certification or equivalent. The most common forms of certification in Northern Thailand are BCS, KRAV, Ecocert, ACT, or their equivalents (Ellis et al., 2006), and these production processes are practiced exclusively by large-scale farm operations. The discourse coalitions active in the commodity network established around NOSO

standards came to believe that equivalence with IFOAM would provide more opportunities for their farmers. Thus, they urged NOSO to apply for accreditation from ACFS, Thailand's national certification board. After several years of negotiation NOSO and ACFS reached an impasse. Though Northern Thai farmers can control their own practices, they cannot control the practices of those surrounding them. Neither can they afford special labeling, such as bar-codes, and processing practices, such as refrigerated storage, to assure a custody chain. For the local farmers, bar-coding their vegetables and documenting harvests before going to the local fresh market were deemed unnecessary, and the additional expense would not be tolerated by their customers. The standards practiced by Northern Thai farmers and accepted by local consumers were not accepted by ACFS.

ACFS refused to grant NOSO recognition as an organic accrediting body until NOSO conformed to all IFOAM standards. The discourse coalition behind NOSO was placed into a conundrum. Farmers had made it clear that they were unwilling to follow certain regulations, especially the regulations concerning land restrictions, buffer zones, and to wait two years prior to becoming certified organic producers, meanwhile being excluded from the organic community markets. It was also clear that consumers were not willing to pay the extra premium, nor were they concerned about the extra precautions imposed by IFOAM for organic compliance, nor did they want to wait two years for their favorite farmers to become certified organic.

This research uncovered that a decision was made by the board of directors to no longer seek accreditation through ACFS during a structured interview with the current director of NOSO. The international standards promoted by ACFS, mandated by international distributors of organic foods, were no longer considered to be important for network practices. I will call this process *reflexive translation* to describe the influence of rejected network objects on a discourse coalition. This term was inspired by Ulrich Beck's notion of the confrontational aspect of reflexivity (Beck, 1994, p. 6). Networks have the freedom to critique the standards of the dominant institutions, going so far as to reject them, resulting in social change, such as the establishment of local organic standards (Lash, 1994, p. 116). Reflexive translation can lead to the acceptance of the complete antithesis of the original proposition, either through policy changes to reject the proposition or through standards effectively nullifying it. Reflexive translation extends Callon's idea of durability and robustness of networks by offering an alternative process for the establishment of network objects, in this case the establishment of organic policies and standards (Callon 1991, pp. 150–151). Previous research on actors working inside an institution demonstrated that individuals working within an institutional framework can act reflexively by evaluating an alternative discourse (Hajer and Law, 2006, p. 261). NOSO reassessed the importance of obtaining AFCS accreditation in light of the responses from both farmers and consumers. The goal of being ACFS certified and internationally recognized as organic producer, though appealing, was unnecessary to establish and maintain a local organic commodity network.

By declaring national accreditation untenable, NOSO made a policy decision to no longer validate government endorsement. Instead, NOSO would continue on its

original path of community recognition and independent validation through personal relationships. New policies were implemented by self-promotion of the now emerging NOSO organic standard. The act of rejecting the standards promulgated by ACFS was a reflexive translation of the international standards. The other allied coalitions, such as ISAC, supported the Board's decision to reconsider the relevance of IFOAM certification. The proposed IFOAM standards were then translated, through a process of rejection, into a new proposition. First, NOSO policy would be responsive to the needs of local farmers and consumers, and, second, NOSO would continue to act as an independent organic certification body outside of the existing national and international frameworks.

Local consumers in Chiang Mai were not concerned about international standards. Instead, they want assurances that the food is safe to eat. They accepted the local community standards. Also, neither NOSO, nor ISAC, promoted the sale of foods or vegetables to commercial retail chains insisting on national or international organic certification. The primary goal of ISAC had been to support locally grown organic foods and vegetables sold at community markets. International accreditation was determined to be unnecessary to meet this goal. It was only under pressure from other, competing organizations, such as ACT, and the possibility of accessing larger markets, that NOSO had ever considered international conformity.

NOSO's actions represents a form of the mobilization and displacement of organic standards whereby rejection of international standards catalysed an unexpected response. The reflexive action of the discourse coalition resulted in the formation of new institutional policies. The 'displacement' caused by the negative, reflexive decision of NOSO led to acceptance by the coalitions constituting the local organic commodity network that the local interpretation of 'organic' would be based on community-supported standards. The presumed power of state or international standards had been subsumed by the willingness of local consumers to trust a community based, organic certified body entirely independent of external accreditation or approval.

Conclusion

In conclusion, organic standards are translated into a local, certifying institution through the affinitive actions of discourse coalitions working together to construct an organic commodity network. In the case presented here, the resulting set of local organic standards was assembled from many different sets of existing internationally accredited organic standards. The discourse coalition selected standards applicable to the market and the farmer, standards that could establish successfully a viable organic commodity network. The translation and mobilization of the standards emerged not as a synthesis of an existing network, but as the establishment of an entirely new institution with a hybrid set of standards.

Local, organic standards are communicated to consumers through the organization, promotion, and production processes of the discourse coalitions constituting the organic agricultural network. Through third-party certification, production

processes, adhering to a set of standards, extend their meanings into the marketplace through logos, labeling, or the creation of specialized market spaces. The symbolic representations of label, logo and space communicate the authenticity and reliability of the organic network to the consumer.

By analyzing the specific flows of power between international organic accreditation institutions and local discourse coalitions, this research demonstrated how local community organizations can re-evaluate the legitimacy of international and or government-sponsored discourse, and choose to accept or reject the legitimacy offered by those institutions for the local marketplace. In this case, the act of rejection led to an affirmation of existing local standards and new policies endorsing the long-term support of maintaining community-based organic standards.

This approach differed from other approaches, since the actors were never part of a dominant institution and their political influence was rejected out of hand. NOSO's rejection of the body of international standards, although originally desired, brought about reflection on the mission, goals and objectives supporting it. The resulting reflexivity on the appropriateness of international accreditation led to questions concerning the reasons for initially examining it, such as: why was the object considered important in the first place; what circumstances gave credibility to the network of origin; or how does co-operation with other networks, by assuming their objects, advance the purposes of the members of the network? The rejection of a translated object influences the practices of a network and, through the institutionalization of defiance by network discourse coalitions, promotes and validates the credibility of the network while disempowering the authority of the dominant network acting upon it.

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Local Food at Italian Farmers' Markets: Three Case Studies

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[Paper first received, 18 January 2010; in final form, 20 September 2010]

Abstract. Despite the massive industrialization of the world agri-food system and the consequent detachment of food production from its consumption, several studies, conducted in Italy as well as in other European countries and in the United States, have shown growing consumer interest in recent years towards the local attribute of food. In this framework, farmers' markets are perceived increasingly as key institutions in the trend towards a less industrialized agriculture and as vital developers of a strong link between urban consumers and rural food producers. Although a plethora of theoretical and empirical research on farmers' markets can be retrieved in academic literature, important questions still remain concerning the demand and supply of locally produced goods at these forms of direct sale. The current article, presenting the results of consumers' focus group discussions, in-depth interviews with vendors and direct observation at three Italian markets (Montevarchi, Naples and Potenza) provides empirical support that the desire to purchase locally produced food is not high on the list of surveyed shoppers' priorities.

Introduction

Over the last century, there has been increasing industrialization of the world agri-food system (Hendrickson and Heffernan, 2002; Senauer and Venturini, 2004) in combination with the constant convergence in food expenditures among high-income countries in the last few decades (Davies and Flemmer, 1995; Regmi et al., 2008). In recent years, however, increasing interest in local food has been observed worldwide. Several studies, conducted in Italy as well as in other European countries and in the United States, have shown growing consumer consideration for local food products (La Trobe, 2001; Boyle, 2003; Morris and Buller, 2003; Ilbery et al., 2005; Stefani et al., 2006; Darby et al., 2008; Brown et al., 2009). Other recent literature provides

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substantial evidence that many consumers are willing to pay premium prices for food characterized as locally produced (Brown, 2003; Giraud et al., 2005).

The market success currently encountered by local food products is due to their inherent ability to respond to modern consumer demand for rediscovering regional and cultural traditions, along with enjoying home-made, authentic food products in place of industrially processed foodstuffs (Fabris, 2003; Henseleit et al., 2007). Moreover, a wide range of benefits are ascribed to food sold to consumers living close to the production area (Brunori and Rossi, 2000; Feenstra, 2002; Guptill and Wilkins, 2002). In addition, it has become progressively more complex for consumers in developed countries, mainly due to small production volumes and poor marketing/distribution capabilities of farmers, to find genuine local food products (Nomisma, 2007).

In this framework, farmers' markets (FMs) are perceived increasingly as key institutions in the trend towards less industrialized agriculture (Weatherell et al., 2003; Hinrichs et al., 2004) and as vital developers of a strong link between urban consumers and rural food producers (Gale, 1997). Undoubtedly, consumer desire to re-establish a bond with local products, alongside other factors, has been an important driver for the incredible renaissance of FMs occurring in the last few years in the United States, United Kingdom and many other Western European countries. Italy, despite being a country with a long tradition of direct agricultural markets, has rediscovered recently an interest in this type of sale.¹ Despite a great deal of attention to FMs in the country's non-academic media, especially in farming, life-style, culinary, and travel magazines as well as in newspapers, television and radio, there is scant specific academic literature. Furthermore, most of the studies in question were completed by historians interested mainly in the cultural and anthropological features of the markets (Montanari, 1994), or by scholars concerned by its normative aspects (Colaneri, 2008; Rossi et al., 2008). Furthermore, attention has often been focused on public markets that cannot be considered fully genuine FMs (such as the Rialto market in Venice, the Porta Palazzo market in Turin and the Central market in Florence).

As described effectively by Feagan et al. (2004), there are two main strands of literature within which FM studies are commonly considered: the analysis and critique of the modern food systems, and those oriented around the discussion of local food systems development. The objective of the current study is to afford an insight into the relation between Italian FMs and local foods, seeking to verify the assumption that the contemporary FM is strongly based on the semantics of local food and new cultures of consumption. Drawing on the work of prominent scholars (e.g. Hinrichs, 2000; Holloway and Kneafsey, 2000; Hendrickson and Heffernan, 2002; Kirwan, 2004, 2006; Brunori, 2007; Smithers et al., 2008), the research investigates the importance of the local attribute of food in three Italian FMs, relating shopper and vendor data simultaneously. In this particular article, the emphasis is reversed to examine whether the Italian FM phenomenon relies heavily on the *relocalization* of food (Winter, 2003; Sonnino and Marsden, 2006; Brunori, 2007; Feagan, 2007) or encompasses a variety of consumer and farmer motivations. Moreover, the study examines how

the empirical outputs accord with previous findings and conjectures in both FM and local food studies.

The work is organized as follows. First, the relation between FMs and local foods is discussed briefly. Second, the methods and results of a qualitative analysis on consumers and vendors of three diverse Italian FMs are presented. Finally, the main implications and major limitations of the results are argued and future research avenues are projected.

Local Foods and Farmers' Markets

With increased purchasing power, new consumption possibilities (eating out, tourism, fairs and festivals) and under the pressure of recent food scandals, new consumer food demands have emerged (Carbone, 2003; Romano and Rocchi, 2006). From an almost exclusive focus on product attributes (such as nutritional values, organoleptic characteristics, attributes of shape, size, etc.), there is growing attention nowadays to process attributes (such as links with the local production area, traditional production techniques, the greening of production processes, animal welfare, corporate social responsibility), with consumers becoming constantly more demanding, more critical, and more fragmented in their food choices, leading to situations where quality differentiation of food products proves essential (Grunert, 2005). However, as noted by Ilbery and Kneafsey (2000), quality is a complex and contested concept, whose significance varies according to the socio-cultural context concerned.

In this scenario, interest in local foods has been widely detected in many developed countries, since consumers perceive them as having higher quality standards and as tools for the preservation of traditions and local know-how. Nevertheless, there is an abundance of ways in which the term local food has been defined. As pointed out by Fonte (2008), Holloway et al. (2007) and Goodman (2003), there is a fairly clear distinction between the North American and the European perspectives on local food, the former being based on the principles of social justice and environmental sustainability, the latter focused mainly on incorporating small rural farms and marginal agricultural economies into economic development. In both cases, however, a major problem in examining and estimating market size and share of local foods is that studies tend to define the term *local* in many different ways. While place-based definitions are the most frequent (though there is no clear agreement on an unambiguous limiting distance) other criteria are often used, such as product type (where local food is thought to be fresh produce), production technique (expected to be traditional), farm size (allegedly small and family owned) and recipe (specific to the area). Furthermore, an important distinction has been proposed between local and locality food products as separate attempts to link foods with their place of production, the former referring to foods produced and consumed within a certain (short) distance, the second related to products from further away but with an identifiable geographical provenance (Ilbery and Maye, 2005). In addition, as some scholars have observed, studies have emerged primarily from the fields of rural sociology and geography, with modest contributions made by consumer research

(Tregear and Ness, 2005). Besides, most of the existing research is related to specific case-studies and does not provide abundant empirical data on the numbers of farms and consumers involved (Marsden, 2004; Ilbery and Maye, 2006; Venn et al., 2006). Table 1 summarizes the most recent contributions to the topic.

Furthermore, while a profusion of research on FMs can be found in the USA and Canada, quite surprisingly, limited economic literature is available on European FMs, which is also mostly recent. Broadly examining the numerous recent studies on FMs in North America (for an extensive inventory of FM growth and development in the US, see Brown, 2002), we note that scholars have mainly focused on two topics: socio-anthropological issues of FMs (Hinrichs, 2000; Guthman, 2002; Allen et al., 2003) and economic issues, investigated primarily through descriptive consumer and/or vendor data, with clear marketing purposes. The latter studies have involved surveys identifying shopper characteristics and purchasing habits (Govindasamy et al., 2002; Wolf et al., 2005; Onianwa et al., 2006), exploring the linkage between consumers' motivations for patronage and their beliefs concerning local food (Feagan et al., 2004; Smithers et al., 2008), and analysing farmers' motivations (Griffin and Frongillo, 2003). By contrast, most of the studies found in the European literature have focused on different subjects: exploring alternative food networks (Sage, 2003; Winter, 2003; Watts et al., 2005; Sonnino and Marsden, 2006; Brunori, 2007), revealing the diverse potential benefits of local food systems and short supply chains (Holloway and Kneafsey, 2000; Marsden et al., 2000; Verhaegen and Van Huylenbroeck, 2001; Renting et al., 2003) and enlightening the social aspects of FMs (Kirwan, 2004, 2006). Despite the portrayed abundance of theoretical and empirical works, important questions still remain concerning the demand and supply of locally produced goods at FMs.

The current work sets out to provide some empirical contextualization and evidence for conceptualizing the relation between FMs and local foods. Furthermore, while previous studies have demonstrated that there appear to exist both social and economic reasons for increased market participation by consumers and vendors, this article shows clearly that local origin is not a major issue for the surveyed shoppers and stall operators.² On the basis of the analysis undertaken, the contemporary Italian FM does not appear to encompass many of the presumed characteristics and concerns reflected in the literature and in public discussion. This outcome is especially relevant given the abundance of discourses concerning the current role of FMs in re-spatializing food in contradistinction to the conventional, globalizing food system.

Methods

Three strategies were employed to explore the relation between local food and Italian FMs: observational inspections of the markets, focus groups of shoppers, and semi-structured interviews with vendors (drawing on Kirwan, 2006). Additional details on the methodology are presented here.³ Qualitative analysis of FMs in central-southern Italy led to selecting the markets of Montevarchi (known as Mercatale del

Table 1. Synopsis of some recent empirical studies on local foods.

Study	Sample	Method	Main Results	Observations
Guptill and Wilkins (2002)	Seven representatives of grocery stores in a New York county	Open-ended interviews	Most of the interviewees stated that locally grown or produced foods are important to their customers and their organizations.	Authors suggest that the marginalization of conventional grocery stores signals a new opportunity for integrative collaborative relationships.
Weatherell et al. (2003)	Urban and rural residents of UK	Six focus group discussions and 734 face-to-face interviews	Found a homogeneous group of people who stated great interest in buying local foods. This group rated other factors more significant than origin.	Product intrinsic factors and moral and health concerns appear more important than origin. Many consumers chose supermarkets as their first choice for local foods.
Winter (2003)	736 residents from five regions in England and Wales	Face-to-face interviews	Reasons to purchase local food were related to supporting local farmers and the local economy, freshness and known origin.	The author raises important questions related to associating either the turn to quality or the turn to localism as the first steps to an alternative food economy.
Tregear and Ness (2005)	734 English consumers	Focus groups and face-to-face interviews	Attitudinal factors tend to explain variations in local food interest better than demographic factors.	Results are ambiguous concerning the stronger association between local foods interest and ethical/ecological features over pragmatic or product intrinsic features.
Ilbery and Maye (2006)	42 retail enterprises in the Scottish-English borders	Interviews	An increasing consumer demand producing commercial interest in local food and a commitment to improving local routes to the retail market.	Surveyed retailers revealed no single consensual definition of local food.
Roininen et al. (2006)	55 Finnish consumers	Word association interviews and laddering interviews	Locally produced food was considered to support the local economy, was related to short transport distance, freshness and trustworthiness of its origin.	Both association and laddering methods gave similar descriptions of local foods.
Darby et al. (2008)	530 shoppers at 17 Ohio (USA) locations	Conjoint analysis from face-to-face interviews data	Consumer demand does indeed exist for locally produced foods and this demand is independent of other attributes.	The study concentrates on a single way of describing local production (specifically state origin).
Smithers et al. (2008)	15 FMs in Ontario (Canada), 237 respondents	Inferential statistics on direct interviews	Customers wish to support farmers and producers (preferably local) through the expenditure of at least some fraction of their total food dollar.	The notion of local emerged as uniformly desirable in principle, but variable in its importance as a food quality.
Fonte (2008)	10 European countries	In-depth case studies	Examining the dynamics of knowledge in the valorization of local food identifies two perspectives on local food networks: reconnection perspective and origin of food perspective.	Different agri-food contexts strongly influence the forms of local food networks.

Valdarno), Naples and Potenza as models of reference for their respective geographical areas. These three markets capture a wide range of agricultural, economic and cultural contexts and also different histories of FM development.

While a fair number of FMs are now found throughout Italy, the markets considered in the current study stand out for several factors: strict definition of saleable products, year-round operation, number of farmers involved, total turn-over and integration into the local economy. At the same time, these markets represent profoundly different types of FMs: a metropolitan market (Naples), a town market (Montevarchi) and a city market with a strong agricultural background (Potenza). Besides, each market has its own operational system, its particular management organization and policy. Indeed, rural area FMs were not taken into consideration at all since their importance in the Italian food sector appears quite meager, mainly due to the strong links still existing between farmers and rural residents (Fonte, 2008). The three FMs were visited several times to observe the amount and type of foods sold, vendor participation, market attendance, operational mechanisms and product prices. To broadly assess economic convenience for consumers who purchased at the three markets, the average price per kilogram of a basket of 15 food products sold at the FMs was recorded and compared with those directly recorded at modern distribution sales points (supermarkets or hypermarkets) surrounding the markets.

As previous studies have indicated (Krueger, 1988; Kuznesof et al., 1997; Chambers et al., 2007; Luomala, 2007), focus groups are particularly appropriate for understanding food choices, due to their ability to encourage participants to explain themselves and interact with others, as well as being flexible, fluid and contextual. Six focus groups, two for each FM, with a total of 37 respondents were held between August 2008 and September 2009. Participants were recruited at the markets, and were screened so as to include only those individuals with at least partial responsibility for food purchases in the household, and with no direct personal involvement in farming. The Montevarchi groups consisted of seven and six participants, the Naples groups of seven and five and the Potenza groups of six participants. The participants comprised 19 women and 18 men, whose ages varied between 21 and 77 years of age (see Table 3 for further details). Prior to holding the actual focus groups, pilot test interviews with consumers ($n=6$) were conducted at the three markets to ensure that the analysed themes were easily understandable by the respondents.

The focus groups were held in the afternoons of market days; recruitment was carried out at the markets and the randomly⁴ selected respondents were residents of their respective localities. A brief questionnaire with demographic information was administered before each focus group was held (see Table 2). To ensure consistency, every group was moderated by the same interviewer; the average length of the focus group discussions was 60 minutes; all discussions were recorded and transcribed.

The discussions addressed three core topics:

- main reasons for people to shop at the FM;
- general interest in buying local foods;
- role of the FM as a good source/ the only source for local foods.

Table 2. Main features of the markets.

Farmers' Market	Year of establishment	Frequency	Location	Number of vendors	Products sold
Montevarchi	2005	Once a month	Town centre	around 50	Fruit, vegetables, wine, oil, cured meats, cheeses, fish, bread and bakery goods, preserves, honey, soaps.
Naples	2007	Twice a month	City centre	around 30	Fruit, vegetables, wine, oil, cheeses, chocolate, preserves and honey.
Potenza	2007	Three times a week	City outskirts	around 15	Fruit, vegetables, preserves and honey.

In general, participants were very informative in their views on the above themes, although in the Potenza groups the discussions were less varied and rich in ideas.

It is important to point out that, due to the limited number of respondents, the conclusions that can be drawn from the qualitative analysis developed in the current article cannot, obviously, be representative of the entire Italian population.

To better frame the investigated issues, following the focus groups, direct semi-structured interviews were administered with farmers selling at the markets. All interviews were audio recorded for transcription and supplemented with hand-written notes. Since the opportunities for engagement with vendors were more difficult to negotiate, the interviews were carried out over several days, either at the FM or on-site. In all, the final sample consisted of 16 randomly selected food vendors from the Montevarchi FM (8) and the Naples FM (8),⁵ all of whom were selling only their own products. The effective duration of vendor interviews was generally 20–30 minutes. An interview guide was developed⁶ to ensure that certain questions were covered during the interview.

Specifically, we asked the farmers:

- if they considered the food sold at the FM as local;
- their opinion on consumer concern towards local foods;
- their opinion on FM development in the Italian food system;
- general information on annual turn-over, amount of products sold at the FMs and farm size.

To investigate the producers' belief in the development of farmers' markets in the Italian food system, respondents were presented with four statements and were asked to rate their agreement on a five-point Likert scale. Finally, it is important to note that the empirical research from which this article draws was undertaken between 2008 and 2009, during the economic recession. In other words, the respondents in the current study were likely to be very concerned about their household food expenditures.

While the findings of this study highlight several significant variables, some limitations should be stressed. Specifically, the small sample size and limited coverage area warrant great caution when extending the results to other geographic areas. Despite such limitations, the results may be useful for vendors to increase the prof-

itability of their operations and improve policy-makers' strategies and actions. The main findings are reported below.

Results

FM Observations

In Italy direct selling by farmers was established under Article 4 of Legislative Decree 228 of 18 May 2001, which is still in force. This opportunity for farmers was reinforced by Art. 1, paragraph 1065, of the 2007 Finance Act: 'to promote the development of markets with direct sale from farmers, by decree of the Minister for Food and Agricultural and Forest Policies'. Nevertheless, in Italy there is no official regulation of the characteristics for a FM, nor is there (as in other European countries) a national association that sets common rules concerning the maximum distance of producers/ growers from the market and type of foods allowed. Each FM has its own specific principles.⁷

The Mercatale del Valdarno is an FM held in the town of Montevarchi,⁸ in the province of Arezzo in Tuscany, on the second Saturday of every month for direct sale by growers or foodstuff producers. Mercatale is the result of a collective project that involves public and private companies and associations, local authorities and area entrepreneurs. The market started in June 2005 and is an integral part of the Mercati della Terra project launched by the Slow Food Foundation for Biodiversity.

The Naples⁹ FM is held bi-monthly (every first and third Sunday) in the Villa Comunale Park in the city centre. It was established by the local Coldiretti¹⁰ at the beginning of 2007 and currently comprises around 30 farmers and growers from the provinces of Naples and Salerno (a south-bordering Province), selling fruit, vegetables, extra virgin olive oil, honey, jams, wine and baked goods. The FM in Potenza,¹¹ the regional capital of Basilicata, was set up by the provincial Coldiretti at the end of 2007 and has been particularly successful. The market takes place in a building



Figure 1. Location of the examined farmers' markets.

resembling a normal grocery store three days a week (Tuesdays, Thursdays and Saturdays); operating hours are 8.30AM to 7.30PM. All products sold in the market (vegetables, fruit and honey) come exclusively from farms in the region of Basilicata, and all the producers/growers operate in the Agro Metapontino area.¹² Although retail activity is delegated to Coldiretti employees, since there are no farmers selling directly at the Potenza market, the management and organization are typical of an FM.

To broadly assess the economic convenience for consumers who purchased at the three markets, prices of a basket of 15 food products sold at the FMs were recorded¹³ and compared with those at modern distribution sales points surrounding the markets.¹⁴

As shown in Figure 2, average prices at FMs were always lower than those of supermarkets, with considerable savings for shoppers, in particular at the Naples FM (40% lower).

Consumers

Considering the totality of respondents (13 from the Montevarchi FM, 12 from Naples, and 12 from Potenza), women accounted for a larger fraction of the sample (57%) than men (43%). In terms of age, shoppers were mainly over 56 years of age (64%), with respondents between 36 and 55 accounting for 22%; the remaining 14% were younger shoppers (under 35 years of age). While 46% of the respondents had a

Table 3. Demographics of respondents.

	Gender	Age	Education	Annual income
Montevarchi (number of respondents: n: 6+7)	Female: 54%	46–55: 31%	High school diploma: 46%	€ 20000–40000: 46%
	Male: 46%	56–65: 23%	Bachelor's: 39%	€ 40000–50000: 23%
		36–45: 23%	Master's/PhD: 15%	€ 10000–20000: 15%
		25–35: 15%		> € 50000: 8%
		< 25: 8%		< € 10000: 8%
Naples (n: 7+5)	Female: 67%	> 65: 50%	Bachelor's: 50%	€ 10000–20000: 50%
	Male: 33%	56–65: 25%	High school diploma: 25%	€ 20000–40000: 33%
		25–35: 17%	Master's/PhD: 25%	> € 50000: 17%
		46–55: 8%		
Potenza (n: 6+6)	Female: 50%	56–65: 50%	High school diploma: 83%	€ 10000–20000: 67%
	Male: 50%	> 65: 50%	Middle school diploma: 17%	< € 10000: 33%

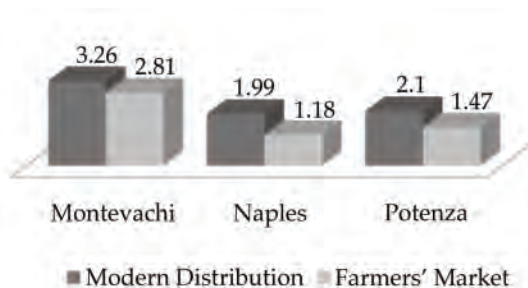


Figure 2. Average price per product at the farmers' markets and modern distribution sales point.

high school diploma, 30% had a Bachelor's degree, 13% a Master's degree or Ph.D., and 11% had completed middle school.

The prevailing annual income range was € 10 000–20 000 (43%), followed by € 20 000–40 000 (27%); 14% of respondents stated they earned less than € 10 000 per year, while the two classes of € 40 000–50 000 and over € 50 000 each accounted for 8%.

Significant differences can be distinguished in market demographics: Montevarchi and Naples FMs were attended by a larger number of consumers with higher annual incomes and a high education level, while the Potenza FM was chiefly patronized by those with low incomes and a low / medium education level (see Table 2).

The main findings of the six focus groups are summarized below together with the most explanatory statements (the specific source in parentheses). Clearly, the results of this study are limited in terms of breadth: based on only 37 respondents, representativeness is far from being achieved.

Main reasons for shopping at an FM

Respondents from the three FMs stated a number of different reasons to explain their participation in the markets. That said, we can observe that consumers of Naples and Potenza FMs tended to indicate price as their top motivation, while Montevarchi FM respondents rated the local factor as their main incentive to shop. These outcomes are not so surprising given the broad dissimilarities between the average annual incomes of the three markets' customers. Other important reasons, for patrons of Montevarchi and Naples FMs, were the quality and freshness of the food products. Our results corroborate previous studies indicating that FM customers are attracted to this form of direct trade for a complex mix of reasons (Hinrichs, 2000; Griffin and Frongillo, 2003; Feagan et al., 2004; Wolf et al., 2005; Onianwa et al., 2006).

'The main reason I buy at the market is because the products are all local; besides, many of them are impossible to find anywhere else' (38-year-old male, Montevarchi FM).

'Previously, I supported the FM because of the general good quality of the products; now my prime reason is local origin and traditional production methods' (49-year-old male, Montevarchi FM).

'I like the market because I find fresh fruit and vegetables at very competitive prices. Moreover, I can actually talk to the farmers and establish a sort of relationship with them' (61-year-old female, Naples FM).

'The market has become an important source for grocery shopping: it is cheap, conveniently located and the food is always fresh and savoury' (57-year-old female, Naples FM).

'The main reason I come to the market is because the prices are far lower than those at supermarkets and traditional fruit and vegetable stores, even if the overall quality of the food is not always consistent' (66-year-old male, Potenza FM).

General interest in buying local foods

At the Montevarchi and Naples FMs, there were clear signals of renewed consumer interest to buy local products. However, the incentives behind this desire differed greatly: in the former FM, respondents were generally interested in developing the community where they lived and in supporting local farms (which they felt to be in economic decline); in the latter FM, people approached local foods for the greater quantity of information available about the production system and farm location. By contrast, consumers at the Potenza FM showed extremely little concern for local foods. These findings amply illustrate that the relationships between food supply process/farming community concerns and interest in local foods are somewhat multifaceted and complex (see also Tregear and Ness, 2005).

'Buying at the market makes me feel I am supporting local farms and (broadly) the entire community' (29-year-old female, Montevarchi FM).

'I actually never asked myself where the food I bought came from. Now [buying at the FM] I am glad to know the origin of food and even more pleased to know that it comes from my region' (71-year-old female, Naples FM).

'After recent problems [food scandals], I am much more concerned about the origin of foods... The market is a form of insurance that I am buying good products from reliable people' (34-year-old female, Naples FM).

'I am not concerned whether the food comes from Basilicata, Puglia, Morocco or New Zealand; I am worried I can no longer buy the products I want as prices are continually rising' (72-year-old female, Potenza FM).

The role of FM as a source for local foods

In general, consumers of Montevarchi and Naples FMs were very pleased by the abundance of local products found and their overall high quality. Shoppers at these FMs also expressed strong appreciation for the amount of traditional, regional products available at the markets. Consumers at Potenza showed that they did not perceive the FM as an unambiguous source of local foods. However, all focus-group participants stated a common dissatisfaction with modern distribution outlet policies to cater for an extremely limited range of local foods and traditional specialties, demonstrating simultaneously a favourable disposition towards buying foods through short distribution channels. In addition, the focus groups confirm previous studies that state the difficulties locating such products in urban/metropolitan grocery stores (Fabris, 2003).

'I support the market because it is a source of local foods that are rapidly disappearing... They taste better and are much fresher' (44-year-old female, Montevarchi FM).

'Thanks to the market I have discovered some incredible local products, such as Tarese cured meat and Abbucciato Aretino cheese' (48-year-old male, Montevarchi FM).

'Most of the products I buy at the market are not available elsewhere in the city, because they are typical or traditional local/ regional foods' (70-year-old male, Naples FM).

Vendors

Eleven of the 16 interviewed vendors (12 men and four women) were fruit and vegetable growers, three were cheese-makers, one was a cured-meat manufacturer and one was a honey producer. Fourteen farmers had inadequate production volumes to meet the requirements of supermarkets and wholesalers. The vast majority of the respondents (11) were over 45 years of age, three farmers were older than 60, while only two respondents were under 30 years of age. The entire sample worked full time on the farm during the growing season. Average farm size was 2.5 ha, and vendors' mean annual turn-over was slightly under € 34 000.

All the vendors defined the products sold at the FM as local foods. However, despite agreeing on a geography-based definition (the distance between producer and market), there was no clear conformity on a limiting distance. Four farmers considered the Province as the boundary; two respondents assumed the Region as the optimal perimeter; two others believed that food products sourced from wider areas (such as central or southern Italy) could be reasonably termed *local*. These results come as no surprise since, as previously described, a wide variety of definitions can also be found in the academic literature and in the professional sphere.

Only two vendors considered local food as the main reason for consumer support for the markets; nine farmers stated that the quality of products was the customer's principal motivation; three cited freshness and two low prices. Nonetheless, most of the farmers (11) noticed growing consumer concern toward the food source, expressed mainly through a higher demand for information on farm location and history. Most of the same vendors (9) also stated that they recently decided to increase the amounts of typical products grown/manufactured, sensing renewed interest and curiosity in the FM visitors. As clearly shown in Figure 3, the majority of respondents expressed a neutral or positive attitude towards the increase in FM number and their importance for small entrepreneurs, while interviewees were much more skeptical about the possibility of FMs becoming an important source for consumers' everyday grocery shopping and the possibility of receiving public support in the near future.

The following points emerged from the interviews with farmers:

- the quantity of products sold at the FM was steadily increasing over time;
- there was a general impression that the FM could be a first step toward a rise in direct food selling;
- a widespread sense of community appreciation for their work;
- a growing willingness to upgrade and develop more effective forms of collaboration among vendors and with local consumer associations, local non-profit organizations and other organizations to strengthen local food marketing;

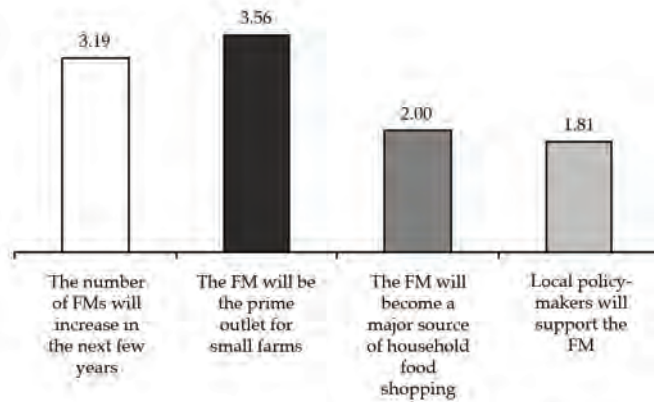


Figure 3. Vendors' average agreement rate (1=very low, 5=very high).

- the need to find continuously innovative and original ways to reach the final consumer and to successfully market their products.

Discussion and Conclusions

The results of consumers' focus-group discussions, interviews with vendors and direct observations afforded a number of key insights into Italian farmers' markets. Although the three markets in question offered food products that were grown or farmed in a narrow, well-defined geographical area in addition to a considerable number of regional, traditional foods, findings provide empirical support that the desire to purchase locally produced food is not high on the list of surveyed shoppers' priorities.¹⁵ Indeed, as reported elsewhere in the literature (Kezis et al., 1998; La Trobe, 2001; Wolf et al., 2005; Smithers et al., 2008), a large share of consumers stated that they patronized the markets mainly due to price, freshness and quality of the products; these attributes appear also quite conjoined. By contrast, consistent with other studies (Weatherell et al., 2003), only a minority of consumers considered local food as the main market feature, thereby disproving the rhetoric of promotional communications that emphasize the relationship between FMs and local food, and corroborating, once again, the hypothesis that pragmatic needs and ethical/civic factors often overlap and coexist (Holloway and Kneafsey, 2000; Weatherell et al., 2003; Darby et al., 2008). In addition, upon analysing the three markets significant differences were revealed in terms of customers' concern for local foods and general motivations to attend the FMs. Nevertheless, some results can be explained by the considerable dissimilarity in shoppers' demographics: more educated, high-income customers at the Montevarchi FM revealed more attention to local foods. This was reinforced by their desire to support the local community and reconnect with their culinary roots. Montevarchi consumers also demonstrated great awareness of the vast array of local and traditional products in their area. This distinction also relies on the specific characteristics of the promoters: in the case of Montevarchi, a non-

profit organization involved in biodiversity conservation, in the other two cases a farmers' association.

However, some elements suggest that an alternative reason could be that, after a period of time, the FM shopper starts to shift the focus from product price and quality to location of the farmer/grower, production methods and typicality of the food. This phenomenon could be termed a learning process, in which the consumer slowly lends greater importance to the local origin of foods, taking other intrinsic product characteristics for granted, assured by her/his previous experience at the FM. Although there is no record of these changes over time, there is a fair amount of substantiation from statements by consumers and vendors that as shoppers become more committed to the market and develop more complex beliefs about local agriculture, their motives appear to become more ethically and ecologically based. Moreover, some findings, especially those from Montevarchi and Naples FMs, suggest that consumers are more attracted by the typical attribute of food instead of its local characteristic. The results of the focus-group discussions were also corroborated by vendors' interviews: only two of the 16 farmers considered local food as the main reason for consumer participation at the FMs, pointing to quality, freshness and low prices as the most significant incentives. On the other hand, most of the vendors noted growing consumer concern for food origin, which even lead many of them to decide to increase the quantity of typical products grown/handcrafted.

Our findings undoubtedly require further analysis and contextualization in a wider scenario. However, the three case-studies confirm that, although *local* has become the new mantra (DuPuis and Goodman, 2005), practical and socio-cultural dimensions still direct shoppers' choices, raising interesting questions on the role of Italian FMs in the widely debated trend in alternative food networks (Gilg and Battershill, 1998; Allen et al., 2003; Watts et al., 2005; Holloway et al., 2006; Sonnino and Marsden, 2006; Venn et al., 2006).

Limitations of the current work are related to the intrinsic problems of focus groups, such as dominating personalities affecting the discussion, reserved individuals not expressing their opinions and a certain physiological degree of observer dependency. Additionally, the explored sample is limited in terms of number of FMs and respondents, which are not statistically representative of the Italian population. A quantitative analysis would have given the final results more general significance. Besides, the FM customer cannot be considered the standard Italian consumer, being, most likely, more inquisitive about the manner in which food is produced and more willing to support small-scale and local family farms over large-scale enterprises. Moreover, findings cannot be generalized since, as earlier studies have shown, there are considerable differences between rural and urban consumers with regard to local preferences (Weatherell et al., 2003) and also regarding demographic characteristics of frequenters of farmers' markets (Wolf et al., 2005). Therefore further research should include citizens interviewed in different food-shopping locations (supermarkets, grocery stores, etc.) and gather a representative sample of the national population. Nonetheless, the present study offers some contribution to a limited national literature on the subject and suggests new research avenues.

Notes

1. In 2007, 57530 Italian farms engaged in direct sales (6.1% of national total), an increase of 18% over 2005 and 48% over 2001; sales were estimated at €2.5 billion, 4.1% higher than the previous year (Coldiretti and Agri2000, 2008).
2. With the caveat that, although the sample includes respondents with a wide variety of socio-demographic backgrounds, findings strictly refer to the sample and are therefore not extendable.
3. Since there is a dearth of reliable secondary data on Italian FMs no external source of information was used.
4. As an exploratory study, a random sample was considered appropriate (Tregear et al., 1998), in particular for the focus group methodology (Kirwan, 2006). People were approached randomly after purchasing at one of the stalls. Approximately, the overall response rate was 5%.
5. At the Potenza FM the vendors do not attend the market.
6. The guide was drawn up after analysis of previous studies, test interviews with vendors (n=2, not included in is article) and discussions with market managers.
7. Only the Slow Food Foundation Mercati della Terra project sets common basic standards for its six Italian FMs.
8. Montevarchi has a population of 23495, while the total population in the province of Arezzo is 342367 (ISTAT, 2009).
9. Naples has a population of 973132 (ISTAT, 2009).
10. Coldiretti is the largest organization of farmers in Italy, numbering over 568000 member farms.
11. Potenza has 68013 inhabitants (ISTAT, 2009).
12. The main towns are Bernalda, Pisticci, Scanzano Jonico, Montalbano Jonico, Policoro, Tursi, Nova Siri, Rotondella, Valsinni, Colobraro and San Giorgio Lucano.
13. The average price was calculated from per kilogram prices of conventional garlic, carrots, cauliflower, yellow onions, snow beans, fennel, lettuce, lemons, long eggplant, potatoes, peppers, pears, tomatoes, plums and zucchini recorded during three visits to each FM. Other products, due to their specificity, were not taken into account in the final computation (such as organic vegetables and fruits, or traditional cheeses and cured meats).
14. In Italy, according to ACNielsen-ISMEA (2006), modern distribution chains account for 77% of total national food household shopping. The largest supermarkets in close proximity to each FM, namely the Coop supermarket in Montevarchi, GS in Naples and IperFutura in Potenza, were visited on the same days as FM operations.
15. Probably also because in Italy there is still a strong link with the tradition of regional agriculture (see Fonte, 2008).

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Supermarkets' Governance of the Agri-food Supply Chain: Is the 'Corporate-Environmental' Food Regime Evident in Australia?

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[Paper first received, 9 March 2009; in final form, 7 October 2010]

Abstract. This article investigates the extent to which the purported greening of food retailing and consumption in Australia is consistent with the development of a *corporate-environmental food regime*. Recent developments in food regime theory, particularly the concept of an emerging third food regime (the so-called 'corporate-environmental food regime'), provide a useful organizing framework for understanding recent agri-restructuring trends. We find that, while a globally based, third food regime is becoming more apparent, the attributes that relate to corporate retail-driven greening of the supply chain are less evident within Australia's domestic market than in its EU counterparts. However, there is some evidence that Australia's export market is subject to some degree of 'greening at a distance' due to private regulations imposed by supermarkets overseas. We argue that while broader agri-restructuring trends may be evident at an international level, elements of greening specific to national contexts are important for determining the trajectory of any third food regime.

Introduction

The global agri-food system has been described as a 'set of relationships that coordinates food production by harmonizing the choices made by producers, processors,

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retailers, food service outlets and consumers' (Bain *et al.*, 2005, p. 1). This system has been undergoing a period of significant restructuring (Fold and Pritchard, 2005). That is, while food production remains situated at local and national levels, the trends to global sourcing, the introduction of new international trading rules, changing state regulation, along with the increased influence of transnational retail capital, have combined to influence the character of the global agri-food system (Burch and Lawrence, 2007, 2009). New power relationships, defined by the global trend towards retailer-driven standard setting, have also arisen. These have sought to address widespread concern about the environmental sustainability of food production systems. For instance, certification schemes such as GlobalGAP (originally used for trade with Europe and now subject to global roll-out) and Red Tractor in the UK have been established to help secure consumer confidence regarding the 'clean-and-green' credentials of the foods they buy. These shifts, along with many others, have altered food production and distribution practices, as well as social relations, on a global scale (McMichael, 2005).

Structural explanations of recent agri-food restructuring commonly highlight processes of globalization, corporate transnational trade, governance, reflexive consumption, and the role of retail capital. Attempts to understand structural changes have been approached via commodity-systems chain analysis (Gereffi, 1996), neo-regulationist perspectives (Lipietz, 1992), actor-network theory (Murdoch, 1998), cultural economy (Dixon, 2004), sociology of consumption (Warde, 1997), and from fields as broad-ranging as food ethics (Mephram, 1996) and business management (Fineman, 2000). Although yielding valuable insights, each provides only a limited opportunity to theorize combined political-economic shifts in food governance within consumption, production and retailing spheres. In contrast, 'food regimes' theory provides a platform for integrating the areas of production and consumption and, in so doing, allows for the discovery of new insights about agri-food restructuring (see Pritchard, 1998, p. 65). Food regimes theory helps to explain capitalism in the past, as well as current 'crises' of neo-liberalism (McMichael, 2009a) and debates around positive futures (Campbell, 2009).

Based on the historical trajectory of the first two regimes (described below), it is widely debated whether the world is on the verge of an emerging, globally based, third food regime (Pritchard, 1998; Buttel, 2001; Friedmann, 2005; McMichael, 2009b).

A new food regime is said to be emerging out of a combination of the concerns of 'greening' consumers, increased supermarket power, and new forms of regulation (Friedmann, 2005; McMichael, 2009b, 2009c). In Australia, as in Europe, the United States and, indeed, throughout the developed world, consumer concerns about the quality, safety and environmental sustainability of foods have contributed to increased demand for 'green' foods. Consumers have become increasingly concerned about both the environmental effects of agriculture and the social effects of the globalization of food production, leading to increased support for 'alternative' and more sustainable food production (Burch and Lawrence, 2005, 2007). This is evident in the rise of Alternative Food Networks such as farmers' markets, community supported agriculture and box schemes – where consumers seek to secure food from localized,

transparent and 'green' supply networks (Morgan et al., 2006). This process of 'greening' – where increased awareness of environmental degradation has created stronger discourses of sustainability, corporate responsibility, and environmental protection for consumers (Lyons et al., 2004) – has opened up new spaces for actors, such as those in the retail sector, to shape the global agri-food system.

On the basis of their depiction as legitimate representatives of consumer interest, supermarkets have emerged as key sites of power (Marsden et al., 2000; Dixon, 2003; Hattersley and Dixon, 2010), by creating private industry responses to recent consumer greening (Burch and Lawrence, 2007). This signifies a shift from previous food manufacturer-controlled supply chains, to ones that are directed by consumer demand and corporate competition to capture the market for the 'green' products that consumers increasingly demand. According to food regimes theory, these trends are characteristic of food production and consumption on a global scale (McMichael, 1994; McMichael and Friedmann, 2007). But whether a third food regime is emerging or is already in place is an ongoing debate (McMichael, 2009b).

In this article, we present an overview of literature describing the historical events leading up to recent agri-restructuring, through the lens of food regimes theory. In particular, we critically analyse recent developments in food regimes theory and compare global trends with observations of changes occurring in Australia. These observations are based on empirical interview data from research conducted by the authors with stakeholders in key positions along the Australian agri-food chain (retailers, suppliers, regulators, and industry and consumer representatives) from 2005 to 2010. The current literature and documents relating to retailer dominance and agro-environmental governance also inform this qualitative analysis, as do public submissions to the Australian Competition and Consumer Commission inquiry into food retail which was held in 2008.

The corporate-environmental elements of the proposed third food regime identified by both Friedmann and McMichael are discussed in relation to evidence of agri-restructuring in Australia. This leads to an assessment of the existence and/or extent of a predictable, proprietor-led, green 'shape' to the current food system and hence contours of an emerging third food regime from an antipodean perspective (see McMichael, 2009c).

Food Regimes Theory

First presented in 1989 in the international journal *Sociologia Ruralis* by Harriet Friedmann and Philip McMichael, food regimes theory examines the links between international relations of food production and consumption and specific forms of accumulation under capitalism since the 1870s (Friedmann and McMichael, 1989). This approach draws from Wallerstein's world-systems theory, Marxist/Gramscian accounts of the social world, and Polanyi's economic sociology, in which the macro-social context of the world system and capitalism is enacted through the practices of capital and the politics of the nation state (Buttel, 2001). The concept of 'regime'

emphasizes the global institutionalisation of political restructuring of food, by illustrating the:

‘sustained but nonetheless temporary constellations of interests and relationships... shaped by (unequal) relations among states, capitalist enterprises, and people who migrated, bought, sold, and reshaped cultures of farming and eating within large, indeed, global constellations of power and property’ (Friedmann, 2005, p. 228).

Food regimes theory represents a theoretical move away from a linear explanation of food relations and places ‘food relationships at the centre of the cluster of relationships comprising historically stable formation of capitalist development’ (Campbell, 2007, p. 4). It does this through examining patterns of food circulation and the role of food politics in the broader geo-politics of global power and class relations, capital accumulation, industrialization, modernization, development, imperialism, crisis, transformation and transition in global capitalism (McMichael, 2009b; see also Friedmann, 2005). Friedmann and McMichael’s (1989) early work identified the parameters of two food regimes, spanning from the late 1800s to the Second World War.

The first system of production and consumption that can be identified as a ‘food regime’ is characterized by colonialism and nation-state formation from 1870 to the mid-1940s (Friedmann, 2005). Despite their eventual decolonization and independence, the colonies of Europe and the UK inherited patterns of international trade in which exports of tropical products, staple grains and livestock served the interests of the metropolitan economies. Colonies in the periphery became a source of raw materials and labour to drive industrialization and capital accumulation in the metropole; by extracting surplus value from colonies, colonial administrators attempted to improve surplus value, increase labour productivity and decrease the value of labour power underpinning colonial expansion (Araghi, 2003). European values of nation-state formation meant therefore that products differentiated by climate and social organization gave way eventually to products based on comparative advantage (Friedmann and McMichael, 1989; Patel, 2007). Trade between periphery and metropole was reorganized, from earlier periods of mercantilism and trade in luxuries, in order to support growing national populations and satisfy an international demand for food exports. Family farms, which previously prepared basic, seasonal, undifferentiated, products, were encouraged to expand through technological advancement and protective tariffs (Le Heron, 1993). Consumers had little influence over what was produced, and the environment was not prominent in political discourse (Burch and Lawrence, 2005). This enforcement of specialization in labour and primary agricultural products, identified by Araghi (2003, pp. 51–52) as ‘the first colonialism’, consequently gave rise to the dominance of industrial capital that followed in ‘the second colonialism’.

This was the beginning of the agri-industrial complex, in which domestic capital formation became the priority of nation states in the period after the First World War and preceding the Second World War (Friedmann and McMichael, 1989; Pritchard, 1998). Despite wealth creation, the majority of goods produced through industrial-

ization did not contribute directly to the subsistence needs of labour. Poverty and hunger of the working classes prevailed along with over-consumption by wealthy upper classes, leading to the 'uneven development of relations of exploitation' and limited opportunities for capital (Araghi, 2003, p. 53). The solution was to use colonies as markets for the export of capital and the import of cheap foods and industrial raw materials (Araghi, 2003). These processes and accompanying regulations persevered until the end of the Second World War, forming the basis for the second food regime (Pritchard, 1998).

From the 1950s to early 1990s, the internationalization of food aid, industrialization of agriculture, and the growth of corporate transnational capital, defined the second food regime (Friedmann and McMichael, 1989). In a context of intense competition, expansionism and continued imperialism, states began to restructure international trade and production by subsidizing exports of surplus commodities. This continued the uneven development of capitalism and resulted in a major 'crisis of accumulation' (Araghi, 2003). After the Second World War, the United States engaged in high-level state protectionism of its agricultural sector and extensive wheat 'dumping' via aid, at a time when new states (primarily in developing countries) sought cheap food. Together, these settings transformed the US into a dominant exporter; turned Japan and developing nations from self-sufficient to importing countries; and framed the emergence of agri-food companies dominated by industrial capital (Friedmann, 2005). 'Agriculture for development' had replaced the 'colonial-diasporic' ambitions of the first food regime (see McMichael, 2009b, p. 143), reflecting political contestations over the implicit rules governing the transfer of value to states (see also Friedmann, 2005).

Based upon productivist agriculture – the widespread use of large machinery, synthetic pesticides and fertilizers, and advanced plant and animal breeding (see Lawrence, 1999; Lang and Heasman, 2004) – agricultural specialization intensified. Agricultural production became dependent upon the agrochemical and mechanical inputs of large transnational firms. Similarly, farm output was increasingly finding its way to processing firms that produced standardized, branded and durable products (Friedmann and McMichael, 1989).

According to food regime theorists, by 1974 this regime had fallen in crisis due to increased protectionism by nations other than the US, a surge in world grain prices and suspension of food aid, Third World famine and aid dependency, the collapse of the Bretton Woods regulatory system, and the failure of the green revolution (Friedmann and McMichael, 1989; Le Heron, 1993; Robinson, 1997; Pritchard, 1998; Friedmann, 2005; McMichael, 2009b, 2009c). These all contributed to a crisis of political representation and legitimation of the second food regime, whereby the resulting global economic insecurity has meant a restructuring of the world food economy (McMichael, 1992; Buttel, 2001). In the context of the latest 'crisis-ridden interregnum' (Fold and Pritchard, 2005), many theorists have attempted to outline the contours of an emergent third food regime. While the exact parameters of the new regime are debated, it is argued that a new regime is emerging in response to the structural problems, as listed above, of the second food regime, to the political realities of

globalization, and to increased pressures for environmental sustainability (Robinson, 1997). These issues are heightened by the recognition of recent ‘multiple crises’ – food, climate, fuel and finance – facing global capitalism (see McMichael, 2009a). Table 1 represents an ‘ideal type’, or ‘analytical abstraction’, of the key elements of the first, second and (emerging) third food regimes.

Dimensions of the Third Food Regime

According to Friedmann (2005, p. 232) food regimes arise out of ‘contests among social movements and powerful institutions, and reflect a negotiated frame for instituting new rules’. Since the 1990s, state responses to concerns arising from early trade movements and farm lobbies in the EU and the US, and the increasing prominence of land reform issues emanating from the global South, have prompted shifts in the governance of food industries and resulted in new power relationships along agri-food chains. Issues such as gender equality, cultural and biological diversity, health and ecological effects of farming, fair trade, agricultural labour, hunger and social justice have combined with more traditional food related movements, resulting in a third food regime within which these issues are contested (Friedmann, 2005). More recently, food rioting and the strengthening of peasant social movement resistance in response to the global ‘food crisis’ have drawn attention to the failure of neo-liberalism to provide food security, social and economic justice in trade relations, and environmental sustainability in the face of climate change (Patel, 2007; McMichael, 2008, 2009a, 2009c).

Incorporating these tensions, the emerging third food regime is said to include: the growth of transnational corporate power, particularly that of supermarkets; new regulatory frameworks; the intensification of production; greater flexibility and specialization of the food system; global and direct sourcing; new production–consumption relationships; increased consumer demand for new health-giving (functional) foods; the rise of environmentalist critiques of industrialist agriculture; and the financialization of the food system (Le Heron, 1993; Lang and Heasman, 2004; McMichael, 2005; Burch and Lawrence, 2009). Thus, food regimes are not necessarily about food, but instead about the ways in which food is:

‘[...] intrinsic to capital’s global value relations, insofar as it is central to the reproduction of wage labor, and may constitute a profitable industry in its own right. The focus remains on the movement of capital, rather than food itself, which embodies capital relations’ (McMichael, 2008, p. 3).

McMichael (2008, p. 4; see also McMichael, 2005) has characterized the new regime as a corporate food regime, emerging from neo-liberal corporate agendas for the control of capital by ‘accumulation through dispossession’ of peasant-based agriculture and raising prices to consumers – something that has come further to the fore in regard to land acquisitions in both the developed and developing worlds by financial institutions and investment funds since the global financial crisis (Kugelman and Levenstein, 2009; Burch and Lawrence, forthcoming). The new regime is also char-

Table 1. Basic elements of food regimes.

	1st Food Regime	2nd Food Regime	Emerging 3rd Food Regime
Historical period	1870–end WWII	1950s–1990s	1990s–present
Name of regime	Colonial-diasporic.	Mercantile-industrial	Corporate-environmental
Main driver/ decision-maker	Farmers; consumers have little influence.	Processing companies.	Retailers; consumers increasingly discerning about food quality, safety and ethics.
Principle tendencies	Colonialism; rise of nation-state system.	Extension of state system to former colonies; transnational restructuring of agricultural sectors by agri-food capitals; productivist agriculture.	Contradictions between productive forces and consumption trends; disintegration of national agri-food capitals; increasing power of agribusiness and financialization of the food system.
Types of food products	Basic foodstuffs for home preparation; seasonal; unbranded and/or undifferentiated products.	Basic and processed foodstuffs for home preparation; branded and standardized products.	Continued expansion of processed foods, accompanied by a growing fresh food complex – flexible batch production of differentiated products marketed on price, variety, novelty, retail loyalty, convenience; functional foods; branded products and supermarket own brands; eco-labelling.
Environment	Of little concern.	To be utilized to maximize profit.	To be farmed in a sustainable manner; organic production; criticism of productivist agriculture and its environmental impacts; climate 'crisis'; tension between agro-industrial and agro-ecological mode of production.
State and regulation	Encouragement of family farming; protectionism; assistance for land settlement and infrastructure.	Support for productivist agriculture, food manufacturing; food aid and cheap food policies.	Encourage global trade but also self-regulation by firms (CSR); opposing trends of further protection and deregulation of agricultural sector; rise of private regulation; decoupling of farm payments from production.
Global trends	Nationally organized farming sectors producing mass commodities for export to colonies; technology transfer; imports of cash crops (tea, sugar) from colonies.	Organization of world food economy under US hegemony after 1945.	'Greening' of consumers; risk society; multipolarity of power (e.g. US, EC, Japan); shift from government to governance.

Source: Developed from Friedmann and McMichael, 1989; Le Heron, 1993; Burch and Lawrence, 2005, 2007; Friedmann, 2005; McMichael, 2005, 2009b; Campbell, 2009.

acterized by the mainstreaming of what were once considered alternatives, such as fair trade and organics (Hughes, 2007; Lyons, 2007). This has resulted in a tension defining the third food regime, whereby a 'food from nowhere' regime is in constant dialectic with a 'food from somewhere' regime. In the latter, products are branded as geographically specific to meet traceability requirements that underpin green claims (Campbell, 2009). In the former, corporate industrialization has driven the conversion of the whole of the global South into a 'world farm', undermining local variance and environmental sustainability at the same time (McMichael, 2008).

Friedmann has suggested a food regimes framework synthesising the above elements into what she terms a *corporate-environmental food regime*:

'A new regime seems to be emerging not from attempts to restore elements of the past, but from a range of cross-cutting alliances and issues linking food and agriculture to new issues. These include quality, safety, biological and cultural diversity, intellectual property, animal welfare, environmental pollution, energy use, and gender and racial inequalities. The most important of these fall under the broad category of environment' (Friedmann, 2005, p. 249).

Through this process of 'greening' – described as the 'change in the ideologies and practices of (largely) western social systems as they move toward the incorporation of ecological discourses, and of practices which seek to address environmental concerns' (Lyons and Lawrence, 1999, pp. 67–68) – the environmental movement has introduced new demands, altering the way that food issues are framed and how the rules of the regime are played out (Friedmann, 2005). Existing research indicates that new power relationships are being forged within agri-food supply chains between producers, retailers and consumers. While the environment may be only one site of conjuncture in emerging power relationships, recognizing the ecological failures of previous regimes has certainly led to normative questions about the sustainability of new relationships (Campbell, 2007). For example, Friedmann (2005) has argued that power relationships between importing and exporting countries have shaped, and continue to shape, constructions of social class within each food regime. Nevertheless, new culturally sanctioned ecological issues are finding their way into food regulations (see Campbell, 2007) through new – often 'hybrid' – forms of regulation that are becoming a key means of controlling these relationships (Higgins and Lawrence, 2005).

Periods of transition between regimes are viewed by Friedmann (2005, p. 229) as opportunities for debates and discussions relating to the potential reorganization of power. For decades, political economists have been arguing that the waning power of nation states is being replaced by the power of transnational corporate capital, as part of states' willingness to shift towards a neo-liberal economic model (see McMichael, 1992). Prior to the 1980s, the organization of agriculture was a major role of states, and food and environmental safety was primarily the responsibility of governments. However, globalization, free trade, and the accumulation of agri-food capital have restructured agriculture, reducing the capacity (and willingness) of the state to regulate food production. International organizations such as the WTO are

faltering at the same time that new forms of global regulation replace national regulation (Llambi, 1993; Friedmann, 2005; Ansell and Vogel, 2006). As shown in Table 1, the regulation of agricultural trade and production has shifted significantly since the first food regime, revealing a global trend towards private interest regulation (McMichael and Friedmann, 2007).

The third food regime differs from the second in that a neo-liberal rollback of state regulation has led to co-ordination of the fresh food supply sector being reorganized by transnational corporations (TNCs), namely global supermarket chains (see Burch and Lawrence, 2005, 2007; Friedmann, 2005; Fulponi, 2006). The state has willingly shifted the responsibility for emerging food-related issues onto the retail sector (Marsden et al., 2000), encouraging global trade while at the same time disengaging from previous responsibilities. This is characteristic of the current era of neo-liberalism (Lawrence and Burch, 2007) in which the centrality of individualization and globalization discourses has meant that governments actively enable the private sector to govern. For example, at the nation-state level, governments in Australia and Britain have legislated that the responsibility of food safety rests with retailers, whereas at the level of meta-governance instruments such as the GATT and Europe's Common Agricultural Policy (CAP) pressure nation states (especially in the developing world) to open up their markets to global retailers (Vorley, 2007), while reinforcing the capacity of supermarkets to compete on issues of quality and diversity through voluntary standards (see Busch and Bain, 2004). These are based on audit criteria that go beyond national laws or regulations, thus walking a fine line between neo-liberalism and protectionism (see Campbell and Le Heron, 2007). As Pritchard (2005, following Higgins, 2002) acknowledges, this is not a 'hollowing out' of the state but represents, instead, changes in the technologies and rationalities of governing.

Recently, there has also been a detectable shift from what was once the domain of the 'environmental movement' to more mainstream incorporation of environmental values. This has emerged as consumers are increasingly responding to the distribution of 'bads' associated with bioscience influenced, industrial food production (Lang and Heasman, 2004) and the resultant concerns of food safety and environmental sustainability. This public resistance to the penetration of the agri-food industries by transnational capital has led the TNCs (and particularly the supermarkets) to respond to consumers' desire for 'greening' through the creation of retailer-led private standards, certification, accreditation, eco-labelling, and branding systems. These private regulatory measures toward 'greening' are emerging as a means for supermarkets around the world to seek to meet consumer demand for clean-and-green foods, and thus to increase market share and consumer loyalty (Fulponi, 2006). But what this also demonstrates is the increased power of supermarkets to 'reach back' into the food chain to control the behaviour of suppliers (Cary et al., 2004; Chang and Kristiansen, 2004; Fox and Vorley, 2004; Bain et al., 2005; Burch and Lawrence, 2005, 2007; Fulponi, 2006). This is evident in Europe (Vorley, 2007), North America (Konefal et al., 2007), India (Neilson and Pritchard, 2007, 2009), Africa (Freidberg, 2003), Australia and New Zealand (Pritchard, 1998; Campbell et al., 2006),

albeit taking different forms, at different times. According to Campbell (2009, p. 311, following McMichael, 2005), this represents the tendency in all food regimes whereby 'the key dynamics of the regime have simultaneously created consent and resistance'.

Friedmann (2005) contends that *greening*, *supermarket power* and *new regulatory structures* are the key themes defining the emerging third food regime. As a relatively new theoretical addition to the study of the sociology of food (including its relationship to agriculture, globalization and capitalism), much of the existing research has focused on identifying and describing historical patterns (Le Heron, 1993). This has led to criticisms that food regimes theory is too focused on descriptive accounts of the 'symptoms' of a new regime, without paying attention to deeper processes of crisis and transition in capitalism that these shifts might represent. McMichael (2008) agrees, however, that although the current food order is conditioned by previous regimes, it also has its own characteristics, which suggest another 'reversal' of how the global food economy is functioning – it is organized by the market rather than the empire (as in the first regime) or the state (in the second regime), meaning that 'the current conjuncture is a distinctively different transition than its predecessor' (2008, p. 1). If agri-food restructuring signals a transition to another – as yet somewhat nebulous – food regime, understanding the present transitional period is crucial.

Up until recently, this theory explains patterns of change resulting from intersections of a global food system with the global capitalist economy, where profit capture is organized around internationally co-ordinated flows of production, commodities and financial capital (Pritchard, 1998). Food regimes theory links systemic changes in global food economies at a macro-scale but has, in turn, received criticism for its inability to theorize national specificities in the construction of food regulation (Moran et al., 1996). For instance, Le Heron (1993) has argued that the early formulations of food regime theory have so far failed to grasp the importance of regulatory dimensions, particularly in terms of national contexts:

'While much national and extra-national policy responses can be associated with earlier food regimes and, it is suspected, the present transition period, the literature is relatively light on the genesis of policy frameworks and, more particularly, the conditions of their support and eventual rejection... [A] much deeper understanding of farming, agriculture and the food system is required' (Le Heron, 1993, p. 78).

Moran et al. (1996) conclude that the experiences of Australia differ greatly from the global agricultural industrializing process described by Friedmann and McMichael in their 1989 article. This has implications for understanding the third food regime in Australia, and questions the 'global' nature of third regime governance. Rather than a single global trajectory, regional dynamics are influential (see Campbell, 2009). In addition, shifting power relations in the third food regime take multiple interconnected forms: historical class relations (such as between empire and colonies); levels of financialization and market share; regulatory power (i.e. shifting from governments to corporations, as well as national regulatory structure); and social legitimacy (negotiated between social movements, consumers and supermarkets at different

points in time). Of these, this article is most interested in exploring regulatory power and how this relates to the negotiation of 'greening' by consumers, regulators and supermarkets, in line with Friedmann's core elements of a third food regime. Historical relations, particularly in terms of shifts towards neo-liberalism and Australia's relationships with UK markets are of secondary interest. Exploring financialization is beyond the scope of this article to address, as is the full history of class relations between Australia and the colonial 'core'.

In summary, investigating whether elements of a third food regime are emerging in Australia requires exploring the extent to which supermarkets are responding to consumer greening, and how this is expressed in retailer-led regulations. In doing so, and in keeping with food regimes emphasis on historical shifts in capitalism and power relations, we can theorize how nationally specific contexts of power (namely between farmers, retailers and regulators), neo-liberal national policy trajectories and green social movements have shaped Australian supermarkets' responses to the broader trends of greening within a global third food regime. As such, the following assesses the extent to which Friedmann's (2005) 'corporate-environmental' food regime can be detected in Australia.

The Third Food Regime: Evidence from Australia

While food regimes theory provides a macroanalysis of supply and demand (Robinson, 1997), recent shifts are also dependent on national policies and priorities, with subsequent effects on national agricultures (Friedmann, 2005). Although most existing research originates from Europe and the US, Worsley and Scott (2000) found that food safety, regulation (food labelling, enforcement of standards), along with ecology and equity issues, are also of great concern to Australian consumers. For example, the growth in organic consumption in Australia is estimated at roughly 20–30% per annum, with over 40% of the population reporting having consumed organic food (Lockie et al., 2006). Environmental advocacy groups and the 'green' movement more generally have been active in informing consumers of debates around genetic modification, biotechnologies, and the impacts of productivist agriculture, and it is well understood that consumers are increasingly concerned about the environmental attributes of the food they purchase (Lockie et al., 2006). Recent research in food marketing in Australia found that heightened concerns regarding health and the environment had led consumers toward the purchase and consumption of organic food (Smith and Paladino, 2010). This theme was also apparent in the current study, where a comment by a representative of the then Australian Consumer Association (now known as CHOICE) illustrates the shift to greener consumption that was also noted by many participants in the study:

'I would agree that consumers are interested in how the foods are produced. And that often translates into environmental aspects such as pesticides, organic production, genetic modification, and things like that... They would probably be the three that occurred to me as being some of the most important when it comes to environmental issues.'

While consumers might have high expectations of the responsibilities of retailers at the top of global supply chains, it is less clear how and to what extent these expectations influence supermarket regulatory strategies in Australia. While one retailer may claim that 'we will see a changing dynamic in the way things are done' (Smith, 2005), other supply chain actors explain that while some issues are influencing regulation, others are not:

'The retailers have done a fair bit to promote food safety, but similarly that's not really publicized to the consumer... I haven't really seen a lot here [suggesting retailers are not] taking that next step to starting to promote the environment' (Quality Assurance representative).

Sustainability claims are not readily apparent in Australia. Rather, supermarkets are keen to emphasize Quality Assurance (QA) attributes such as food safety and the cosmetic appearance of fresh products. This can be attributed in large part to the structure of the Australian food regulatory system. In 1996, Food Standards Australia and New Zealand (FSANZ) was developed to ensure that food produced in Australia would meet internationally recognized codes and practices, such as Hazard Analysis and Critical Control Points (HACCP) (Baines et al., 2000). This prompted the emergence of a number of national, industry-owned programmes to regulate safety and quality to meet FSANZ guidelines. These include Freshcare (the leading code of practice in horticulture), Safe Quality Foods (SQF) 2000 and Great Grains (Baines et al., 2000). Each Australian supermarket requires producers to meet the requirements of one or more of these schemes, and have only recently begun to create QA schemes of their own. QA differs from other forms of re-regulation in that quality is based around reducing food safety risks for consumers at the same time as appealing to aesthetics. These can run counter to sustainability principles, as these comments from a growers' representative suggests:

'So their specification says that we want apples that are 70% red or 70% green, you know, and we want them to all be 130 grams... [G]rowers have to push their tree to do it, to make it do stupid things to get this specification. So it's not a better quality apple, it's just a more marketable apple... I don't think there are many or any growers who would have the capacity to say with any confidence that "this is a sustainable farming system".'

Given such evidence common amongst participants, it seems that at present, supermarket chains in Australia are reaching back along the supply chain in terms of 'clean' (quality assurance) rather than 'green' (environmental sustainability) credentials of produce. Participants argued that recent attempts to harmonize supermarket QA programmes have been extremely problematic, and that this has created a political climate unfavourable for the implementation of retailer environmental standards. Suppliers have had to choose which supermarket QA programmes to adopt, and put time and money into achieving compliance. This has resulted in retailers' hesitance to pursue further private regulation in the short term, because:

'[T]hey're still coming to terms with the QA / Food Safety stuff, they don't want to overload people, their suppliers at the moment' (Quality Assurance representative).

'[P]eople have made their choice now about which they're part of, and they're generally pretty happy... I think it's kind of settled out to where it is now, and that's where it will probably stay. No one's really ready for a supermarket requirement for an environmental assurance' (Grower).

In Friedmann's (2005) understanding of a corporate-environmental regime, production practices are altered in order to reduce environmental degradation and thus satisfy 'green' cultural shifts. This should suggest that supermarkets would increase their public standing in demanding that the foods they purchase are from sustainable farming systems. However, as suggested by Lyons et al. (2004), there appears to be little encouragement from Australian retailers for production to be clean and green, beyond emphasizing quality through product specifications. In the US and the UK, consumers can 'vote' for sustainably-produced foods by examining labels, identifying and purchasing those products. However, at this time, Australian supermarket QA schemes are not consumer labelled – that is, do not carry 'green' symbols that would allow consumers to choose products purporting to be from sustainable production systems.

Instead, consumers concerned about sustainability are more likely to identify with, and purchase, organic foods. Studies have shown that organically produced foods are perceived to provide enhanced animal welfare and environmental protection benefits over conventionally produced foods (see Lockie et al., 2006). However, organic accreditation systems certify producers, not supermarkets; while supermarkets will label their own brand organic products as such, this does not necessarily confer a 'green' status on the supermarket brand beyond individual products. It has also been shown that many consumers purchasing organics do so for nutritional reasons, rather than green claims per se (Lockie et al., 2006), meaning that organics contributes to increasing supermarkets' legitimacy as 'health authorities' rather than as 'green' authorities (Dixon, 2007). Considering that fresh organics make up only 5% of total sales for Woolworths and 2–3% for Coles, but that both retailers have increased the range of organic products under their own labels (Lyons, 2007), we may conclude that supermarkets' move towards organics probably represents an effort to capture a niche market share for their own brand products rather than to rebrand or reconstruct their brand reputation via explicit environmental labelling. Neither major supermarket was making explicit efforts to position themselves as experts in organics and, as Lyons (2007) found, neither had an organic sourcing policy. Thus, there is growing concern that as Coles and Woolworths implement similar contractual, quality and efficiency norms on organic producers as for conventional producers, increasing concentration of the organic sector has occurred with negative consequences for small producers and the environment (Lyons, 2007).

It may be that 'green' retailer regulations are not necessary in the Australian context. Evidence from the UK indicates that supermarkets – rather than the state – have

faced pressures to respond to serious health and environmental concerns (Lang and Heasman, 2004). Warde (1997) suggests, for example, that poor governmental responses to food scares in the UK have resulted in a lack of consumer confidence in state regulation, and thus a greater willingness to trust private entities such as supermarkets. At the same time, the UK green, consumer and food movements have been successful in raising consumers' awareness and advocacy, as well as policy recognition, particularly around the issues of food contamination and food miles (Lang, 1999). These have been less contentious for Australian consumers, however, considering the absence of major food scares, mad cow disease or airborne pollutants in Australia, and considering that around 97% of fresh produce sold by Australian supermarkets is Australian grown (Lyons, 2007). According to Burch and Rickson (1998), this has meant that Australian consumers assume that food is already 'clean and green'. Early quality assurance schemes and the development of (FSANZ) have also been instrumental in establishing (and perpetuating) Australia's clean-and-green image in the minds of consumers (Baines et al., 2000; Chang and Kristiansen, 2004). Supermarkets, therefore, do not yet have to construct this discourse through their private regulations in order to gain legitimacy, as this comment illustrates:

'I don't think it's likely in the short term. Once again, I still think we are trading and enjoying the benefits of a clean-and-green environment that the rest of the world envies in many cases... Well I don't think yet that we're seeing this as having a strong place in the food chain in Australia... [W]e are a lucky country' (Regulator).

Australian consumers do not appear to be engaging with retailers and regulators as might otherwise be predicted. Rather, evidence from Australia indicates that while supermarket power is increasing, the legitimacy of food retailers' attempts to regulate is being challenged. Concerns from both consumers and farmers about the pricing fairness of Australia's two major supermarket chains (which control over 70% of market share) led to the establishment of an inquiry by the Australian Competition and Consumer Commission into the competitiveness of retail prices for standard groceries (ACCC, 2008). Despite official findings that food retail was 'workably competitive' in Australia, this process enabled the airing of grievances from various actors along the supply chain about the 'unconscionable practices' of retailers.

Importantly, although this 'green' momentum is not evident in the practices of Australian food retailers, this is clearly the case elsewhere. For instance, Tesco, the UK's biggest supermarket chain, has various private standards to steer the conduct of their farm-produce suppliers. One of these private standards is 'Natures Choice', which requires independent auditing in relation to safety, quality and environmental standards (Tesco, 2009). Growers who do not comply are given a warning via a 'yellow card' system. Two yellow cards suspend supply contracts. Through such private mechanisms, supermarkets have the power to police actors along the supply chain. As yet, this is not evident in Australian supermarkets' relationships with suppliers.

This does not mean that Australian producers are immune from standards imposed by the large corporate retailers. As Australia is a major food exporter, its food producers are subject to the regulatory requirements both of overseas govern-

ments and of private retail corporations that operate abroad. GlobalGAP is now the main private standard applied by Europe-based retailers (Campbell, 2005). It is a business-to-business, private retail protocol through which exporters of agricultural produce into many European supermarkets must be certified in relation to Good Agricultural Practice (GAP). GlobalGAP was created to improve consumer confidence in the aftermath of the mad cow disease food scare. It requires the certification of sustainable farming practices, traceability and quality through independent, third party verification (usually at the growers own cost). Major European supermarkets, such as Tesco, Migros, and Marks and Spencer, increasingly require imported produce to be GlobalGAP certified (Campbell, 2005); there are now 113 Australian producers accredited to GlobalGAP (GlobalGAP, 2009). As such, powerful entities such as European supermarkets are able to express their regulatory power in what amounts to 'greening at a distance' (drawing upon the concept of 'action at a distance' from the governmentality literature), whereby Australian producers are involuntarily enrolled into the third food regime regardless of regulations on home turf.

Such distant corporate environmental governance fits neatly with Friedmann's observations regarding the key elements of the third food regime. Whilst it may only be a matter of time, Australian supermarkets currently do not exert this environment-focused regulatory power along the supply chain. In fact, the web sites of Australia's two major supermarkets (Coles, 2010; Woolworths, 2010) refer to their environmental responsibility in terms of the reduction of plastic bag use, recycling, and energy efficiency. No reference was made to private regulatory standards, nor was this evident from the interviews. When asked about the future of regulation and quality assurance, interviewees predicted that private environmental regulations would become part of supplier arrangements in the near future. As one reported:

'Supermarkets could specify, if they wish to, that as well as products meeting their specifications or their standard – their quality management system standard which would have safety built into it – they could add on to that another tier, which could be an environmental standard... And that may come, down the track.'

The apparent refrain by Australian supermarkets to regulate via specific standards for the environmental sustainability of food raises many questions about the current socio-political context of food retailing in Australia. Although the diminishing role of government food regulatory authorities in Australia has been widely noted (see Dixon, 2003), two important outcomes – in terms of who claims legitimacy for regulating Australia's 'clean-and-green' food system – can be observed.

First, co-operating with existing state regulation is an integral part of supermarket power politics (Marsden et al., 2000). Both advantages and disadvantages of this reality were revealed in the empirical research:

'I don't see that [supermarkets] are going any further than what they're required to do by law' (Consumer representative).

'Woolworths has to make regulations according to government regulations'
(Supermarket employee).

Second, Australian farmers are hesitant to concede regulating rights to retailers (Smith, 2005). Evidence from Australia indicates that while supermarket power is increasing, food retailers' attempts to regulate may be challenged by growers who are currently enrolling in voluntarily schemes such as Environmental Management Systems (EMS) to differentiate their products as sustainable (Higgins et al., 2008) and perhaps to pre-empt further supermarket governance of farming practice. The importance of the sector setting their own environmental standards was a common theme, as explained by one grower:

'As an industry, we want to be in control of that, because no one knows about the farming systems as much as the actual industry members do... That's kind of the rationale for the industry developing its environmental assurance standards of its own ... [T]he industries said "well if we're going to address it, let's come together once and minimise the potential for six thousand systems to happen again"... And the concept is, get in and do that as growers, before Woolworths or Coles adds an environment bit of their own creation into their existing requirements' (Grower).

While it may not be supermarkets driving these voluntary regulations, they remain a key strategy by which to shift power relations, thus illustrating the tendency towards private re-regulation and state deregulation depicted by the third food regime. As Fulponi (2006) suggests, supermarkets' efforts at voluntary self-regulation may signal the first steps towards global management of food systems, whereby re-regulation and deregulation go hand in hand. Certainly, given the level of concentration in Australian food retailing, growers are finding themselves under increasing pressure to comply with the will of the supermarkets, whether they find these conditions satisfactory or not (Burch and Lawrence, 2007; ACCC, 2008). As discussed previously, Quality Assurance schemes have been instrumental in establishing (and perpetuating) Australia's clean-and-green image in the minds of consumers (Chang and Kristiansen, 2004). Supermarkets, therefore, do not yet have to construct this discourse through their private regulations in order to gain legitimacy. Retailers' capacity to add to already established notions of 'green' through self-regulation is increasing, however.

This closely reflects trends towards neo-liberal governance affecting Australian agriculture more generally (see Colemana, 1995; Gray and Lawrence, 2001). The current regulatory structure of the Australian food industry can be described as a mix of public (government-led health and hygiene-related minimum standards) and private (proprietor/industry-led standards that incorporate and in many cases expand upon mandatory standards). These mechanisms of governance enable growers to take primary responsibility for producing clean-and-green foods, and create a basis upon which supermarket claims of supporting sustainability can be grounded. This hybrid public-private regulatory mix corresponds with neo-liberal regulatory frameworks found elsewhere, in which the government serves not only to regulate directly,

but to 'enable' markets to regulate themselves. For instance, in both Australia and the UK, changes to the Trade Practices Acts have placed the onus on retailers to ensure that the food they sell is safe (Fulponi, 2006; Burch and Lawrence, 2007). This reflects shifts throughout the developed world in which governments remain responsible for base-line health and safety regulations, while requiring retailers to be responsible for meeting consumer demands for food (Marsden, 2000). While supermarkets in Australia are not yet involved in standard-setting to the extent experienced in the UK and elsewhere, research suggests that retailer-led environmental regulations will form a substantial element of Australian supermarkets' greening strategies in the near future (DAFF, 2000; Lockie and Higgins, 2007).

A process of re-regulation is thus occurring in line with new priorities for economic governance (Le Heron and Roche, 1999). Papadakis and Grant (2003, p. 27) suggest that, by mixing state intervention with voluntary and market-based approaches, Australia is a pioneer in 'light-handed regulation'. In this new regulatory style, governments increasingly facilitate processes that provide the basis for firms to secure profit from food production: the state neither wants to subsidise nor to direct firms (Le Heron and Roche, 1999). Rather than radically replacing state regulation with private regulation via 'audit technologies', Australia appears to be engaging in a process of re-regulation in which supermarkets and the state share the regulatory 'legitimation process'. This is consistent with Marsden et al.'s observation that 'both the retailers and the state have to constantly redefine their relationships with each other' (Marsden et al., 2000, p. 34). As Campbell and Le Heron (2007, p. 149) have argued:

'[W]hile a blanket claim of a shift in power from food producers to food retailers may be appealing, it actually misses a range of diverse power gains within agri-food systems and dismisses their cumulative effects.'

Conclusion

Food regimes theory asserts that power relationships shape patterns of accumulation, defining each food regime and resulting in particular consequences for agricultural production (Friedmann and McMichael, 1989). The third food regime includes, among other things, supermarket-driven, private standards relating to environmental sustainability: our research suggests there is little evidence that supermarkets are using their market power to address environmental issues through meaningful regulation in Australia. From the little research available, national trends suggest that Australian supermarkets have not yet moved to cement their environmental credentials through private regulation to the extent suggested in the food regimes literature. Instead, it appears that supermarkets improve their power positions by virtue of their capacity to represent the consumer interest and to 'fit' with government desires for self-regulation. This may change in the future, however, due to the neo-liberal trajectory of self-regulation in Australia, just as it may change as the world moves into recession, or even depression and nation states begin to re-regulate. However, at the present time, Australia is reliant on a 'clean and green' image within a domestic mar-

ket that has not yet been subject to the food scares experienced in Europe; there is perception that government regulation is satisfactory and that farmers should be working with governments rather than supermarkets. Consumers appear to be relatively satisfied with green claims made by industry or asserted through third-party organic certification, meaning that supermarkets' quality assurance schemes are free to focus on food safety and appearance, often with neutral or negative impacts on the environment. Supermarkets only superficially deal with environmental issues through addressing more salient and visible reputational issues such as plastic bags or packaging. Another interpretation is that Australia could well be on a trajectory towards these 'corporate environmental' characteristics but is currently experiencing a degree of regulatory lag.

In a study of the British food sector, Marsden et al. (2000) have demonstrated that supermarket involvement in food regulation has occurred in concert with state deregulation and re-regulation (see Le Heron, 1993; Marsden et al., 2000). However, as this article has shown, although this validates observations of the emergence of a third food regime – it seems to hold more relevance to retailers operating within Europe rather than Australia, whose full manifestation of a third food regime may be delayed. This suggests that the third food regime is indeed developing unevenly (Araghi, 2003). This questions the extent to which a third food regime is 'globally institutionalized', as claimed by Friedmann (2005) – our evidence suggests that while the regime may indeed be global, Australia seems to be in a state of 'transit' and thus different from other countries (such as the UK) further along the transition process.

Unlike their European counterparts, Australian consumers are not being assured that farming practices are environmentally sustainable. Yet, the fact that agricultural and land-stewardship practices in Australia can be determined by private retailers in distant markets in Europe presents evidence of partial conformity to the corporate environmental standards elsewhere within global trading circles. As such, we argue that in the absence of such measures for its own domestic markets, Australia is not yet fully immersed in the third food regime. In fact, we find a certain resonance with what Campbell (2005) termed 'ecological neo-imperialism', where former colonial relations between countries such as New Zealand and Australia still carry the cultural signifiers of the past: namely, providing food and sustenance to the 'mother country'. In this particular rendition, however, the rules are not determined by the sovereign power of the nation state, but through private standards imposed 'at a distance' by European supermarkets. This reflects Friedmann's (2005) concerns with class reproduction through food regimes, and reinforces the importance of class relations in interpreting the third food regime.

The concept of 'greening at a distance' also suggests an interesting direction for future research, and would respond to Campbell's (2007) call for food regimes theory to embrace more explicitly the 'ecological turn'. While broader agri-restructuring trends may be evident at an international level, elements of greening specific to national contexts are extremely important for determining the trajectory of any third food regime. This article has sought to illustrate how the emergence of new forms of supermarket regulation is dependent on the national context, especially at the inter-

section of state regulation and consumer attitudes and behaviours. By highlighting some of the specific components of this process, it appears that Australia is only partly immersed in the corporate-environmental (that is, third) food regime.

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