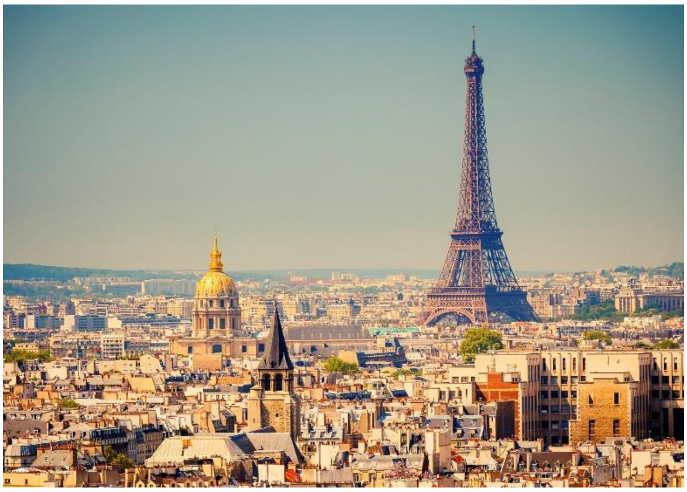

The activities and experiences of speciality regional food producers in northern England : a qualitative study

Angela Tregear[1]

[1] University of Newcastle, Department of Agricultural Economics and Food Marketing, Newcastle Upon Tyne, UK.

angela.tregear@ed.ac.uk

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Angela TREGEAR

University of Newcastle, Department of Agricultural Economics and Food Marketing
Newcastle Upon Tyne, UK.

Abstract

The production of speciality products attached to particular geographic areas is of growing importance to the agrifood sector in the UK. However, the centralised nature of the industry's infrastructure, together with the special nature of the products themselves, raise issues about innovation, the use of technology and effective marketing of territorial foods. This paper reports the results of a study which investigated the experiences, attitudes and motivations of speciality regional food producers situated in the north of England. The study adopted a qualitative approach, allowing in-depth exploration of the producers' views on their businesses, production processes, consumer relationships and future aspirations. Interviews were conducted with 15 speciality food producers, all of whom were members of local regional food promotion groups. The sample comprised a broad spectrum of different types of producer varying by factors such as size of operation, product sector, personal background and degree of training in production and marketing. Products offered by these producers showed different types and degrees of attachment to the local territory. The producers themselves were found to be highly knowledgeable and enthusiastic about their product sectors, and were found to hold strong views on issues such as product quality and authenticity, the use of supermarkets for distribution and adaptation of methods to meet customer needs. In both production and marketing, producers showed a combination of resistance to change and modification in some areas, while displaying high levels of innovation and entrepreneurship in others. Overall, the results give an insight into the current state of mind of a set of speciality producers in the UK. It is anticipated that the findings will be of use to policy-makers and advisers in the agrifood and SME sectors.

Keywords : speciality regional foods, producer behaviour, market orientation, qualitative study, UK.

INTRODUCTION

In recent years, much attention has been focused on speciality food production associated with territory. Policy initiatives such as EU Regulation 2081/92 have singled out producers of territorial foods for special attention, offering them the opportunity to differentiate their products and gain competitive advantage. Such initiatives seek to achieve objectives of creating wealth and prosperity in marginal rural areas, by capitalising on increased consumer demand for speciality foods. An underlying premise of these policy initiatives is that speciality food producers act as commercial enterprises seeking to orientate their enterprises towards the market. It is assumed that designation of origin will be invoked as a value-adding or competitive measure. At the same time however, many small-scaled territorial food producers engage in the maintenance of traditions of craft production. They carry the responsibility for the culinary heritage of their areas. Questions are raised therefore about the meaning of commercial objectives and market orientation within such enterprises. How do such producers perceive their enterprises' purpose ? Do they seek to operate in a market oriented fashion ? Where do the social and cultural dimensions of these enterprises fit in ? Very little is known about the ways in which speciality food producers view their enterprises or the mechanisms underpinning their commercial or marketing decisions. The purpose of this study is to investigate in-depth these experiences and processes.

1. THEORETICAL CONTEXT

The theoretical context for this research is derived from marketing, in particular the literature pertaining to constructs of market orientation (e.g. Narver and Slater, 1990 ; Kohli and Jaworski, 1990 ; Greenley, 1995 ; Pelham, 1999). Within this literature, it is proposed that for firms to be commercially successful, a market orientation should be adopted which comprises a combination of managerial mindsets and firm activities. In terms of mindsets, a market orientation includes the ability of the producer to have a focus on the external environment, particularly customers (e.g. Narver and Slater, 1990), as well as to desire profits and growth (e.g. Carson, 1985). In terms of activities, a market orientation involves the gathering and dissemination of information about the external environment, in particular customers, and the planned, co-ordinated response to such information (e.g. Kohli and Jaworski, 1990). Overall, there is general agreement that enterprises which seek commercial success would be well advised to adopt market oriented behaviour.

When considering the literature on craft based enterprises however, there is much evidence to suggest that the mindsets and activities prioritised by these producers contrast quite sharply with those of a market orientation. Perhaps most fundamentally, it is argued that individuals involved in the production of artisan or craft based items do not prioritise profit or growth objectives. Rather, such individuals seek to fulfil their own objectives regarding inner satisfaction or quality of life (Townroe and Mallalieu, 1993). This lack of prioritisation of growth or profit would appear to run counter to a market orientation, and also strikes at the heart of the logic underpinning policy objectives. Furthermore, sociological and anthropological studies of craft enterprises reveal how craft production has a social, community role, with the resulting products carrying symbolic, cultural significance (Nash, 1993 ; Terrio, 1996). As such, craft producers are not portrayed as commercialists who view their products primarily as items for exchange, which are then modified in accordance with consumer preferences in order to gain competitive advantage. Rather, they are portrayed as actors in a social network, who are guided by the social and cultural significance of their activities, and the feelings that they attach to these.

Therefore, there appears to be a dichotomy in the literature between the mindsets and behaviours of a market orientation which appear to underpin policy initiatives, and those which are inherent within craft based producers. Indeed, authors have argued that the market orientation paradigm is inappropriate for enterprises akin to speciality food producers, such as small firms (e.g. Carson, 1990 ; Hogarth Scott,1996), artists and ideologists (Hirschman, 1983). Furthermore, Lassaut and Sylvander (1997) have argued that producers of speciality foods execute a marketing process quite different to that implied within a market orientation. Instead of gathering information on customer needs and modifying the product accordingly, these authors observe a "cognitive" approach which involves education of the consumer as to the special attributes of the product. These studies suggest that the marketing conducted amongst speciality food producers is different to that found in large, non-craft firms. However, previous studies have not investigated specifically the apparent conflict between the values and objectives underpinning market oriented behaviour and those underpinning the socio-cultural dimensions of the craft food producer.

2. METHODS AND SAMPLE

The objectives of this study were to investigate, in depth, the experiences and perceptions of speciality regional food producers with respect to the orientation of their enterprises and their decisions in marketing. In particular, two questions were addressed :

(i) How do producers perceive their external environment (customer, competitors, and supply chain partners) ?

(ii) How do producers perceive their enterprises' purpose (i.e. to what extent are they market oriented or guided by non-commercial objectives) ?

To investigate such questions in sufficient depth and detail, a qualitative approach was adopted. This approach is ideal for investigating complex issues relating to individuals' perceptions and feelings, allowing research subjects to express views and opinions in their own words and to give data rich in detail and meaning. As such, semi-structured in-depth interviews were conducted with 15 speciality regional food producers in the north of England (Table 1). Interviewees were chosen on the basis of their products having some link to the local area. This aspect was important because it signified that the producer was likely to be engaged in craft methods, or at least interested in communicating this to consumers. The sample was chosen following interviews with the co-ordinators of regional food promotion groups in the north of England, who gave their advice as to the most appropriate subjects for the research. The interviews themselves were conducted with recourse to a discussion guide which covered areas such as interviewee background and interest in present activities ; perceptions of products and production processes ; importance and role of location ; and business and marketing decisions.

Table 1 : Sample Profile

Type of Producer	Business Size[1]	Business Age (Number of Generations)	Formal Production Experience/ Training	Formal Marketing Experience/ Training
Delicatessen	Small	1		
Butcher	Micro	3	√	
Brewer	Micro	1	√	
Butcher	Micro	1		
Baker	Small	4	√	
Cheese-maker	Small	3	√	
Confectioner	Small	3		√
Fresh Soups	Small	1		
Cheese-maker	Micro	1		√
Cheese-maker	Micro	1		
Fish Smoker	Small	4	√	
Bee Keeper	Micro	2	√	
Brewer	Small	4	√	√
Baker	Small	1		
Butcher	Micro	3	√	

1 *"Small" = 10 or more employees ; "micro" = <10 employees*

It may be seen from Table 1 that although the sample was homogenous in that producers were all based in the north of England and involved in making speciality products with some link to the local area, in other characteristics, such as size and level of expertise in production and marketing, the producers were quite diverse. Another point of difference was the extent to which territory appeared to influence the nature of the products. In some cases, products had voracious territorial distinctiveness, that is, local ingredients were used to make the product, and/or traditional methods of production were used. In other cases however, neither ingredients nor methods used were locally distinctive, although the products communicated "locality" via the use of appropriate words, symbols, colours and images in packaging and promotional literature. This diversity of types of territorial voracity is the subject of on-going analysis.

3. RESULTS

3.1. Producer Perceptions of the External Environment

Producers were forthcoming in their views of their customers, competitors and supply chain partners. In terms of customers, the common view was that most customers fitted into the wealthier ABC1 type categorisation of consumer, whilst additionally, tourists were seen as important to some producers who were located in popular visitor areas and who found themselves trading strongly on that basis. In terms of the nature of customer relations, there was something of a dichotomy : on the one hand, producers spoke with feeling of their preference for open, direct and transparent relationships with customers, based on long-term loyalty and preference. On the other hand, many producers asserted that the majority of their custom was derived from urban areas, typically in the south east of England, therefore geographically quite distant from their production base. In terms of competition, interviewees spoke of increases in competitive intensity, both from new small scale enterprises starting up recently, as well as from larger companies who were perceived to be interested in "cashing in" on the interest in speciality foods.

3.2. Producer Perceptions of the Supply Chain

Producer accounts of their experiences in the supply chain gave rise to strong feelings and some of the greatest causes of concern. It transpired that both procurement and distribution were major areas of concern and difficulty for these producers. A key reason for this, interviewees reported, was that much concentration had taken place in their sector's supply chain in recent years, leading to a gradual increase in the size and scale of supplier and distributor companies. Interviewees found this led to problems of finding suppliers who would deal with their small-scaled requirements. Some interviewees found themselves having to look abroad to find suppliers willing to deal in small quantities : for example, a brewer (sourcing bottles from Czechoslovakia), a fish smoker (sourcing fish from Iceland) and a baker who used to source all milk curd from a local dairy, but had to abandon this when the dairy was centralised. A confectioner who was in the process of negotiating with a packaging supplier in South Korea complained of a lack of service from the current UK-based firms which he sourced from :

"The [packaging] manufacturers are, by and large, getting larger and in the scale of things we are very, very small beer for the [these] people. ... If they are supplying Heinz beans with 10 million tins a year, our 60,000 looks pretty insignificant. We do suspect that is the reason why we do not get the service and all the rest of it that we would like".

(Confectioner, Yorkshire)

Therefore, there was a perception from interviewees that their small size put them at a disadvantage in terms of treatment and service from suppliers. Distant procurement may be thought of as a crucial problem for these speciality producers because such activities impact upon "regionality" claims and credentials.

3.3. Producer Perceptions of Supermarkets

In some sectors, distribution was perceived to be as problematic as procurement for effective decision-making, as downstream supply chains were reported to be similarly concentrated and integrated. During discussions, it became clear that most interviewees were keen on the independent retail sector, and by contrast, held very negative views about supermarkets and larger distributors. The reasons for such negativity were varied. In some cases, the argument was economic, with distribution through supermarkets perceived as harmful to the specialist cachet of the product. A more common complaint of supermarkets however was that their methods of working ran counter to the type of supply chain relations interviewees preferred to cultivate. One frequently recurring theme was the "power" of supermarkets, particularly their ability to dictate price terms and "de-list" producers. These were considered particular problems for small producers because of their close operating margins and inability to cope with too much stock. Terms used such as *"bullying"* and *"screwing down on price"* are illustrative of these concerns.

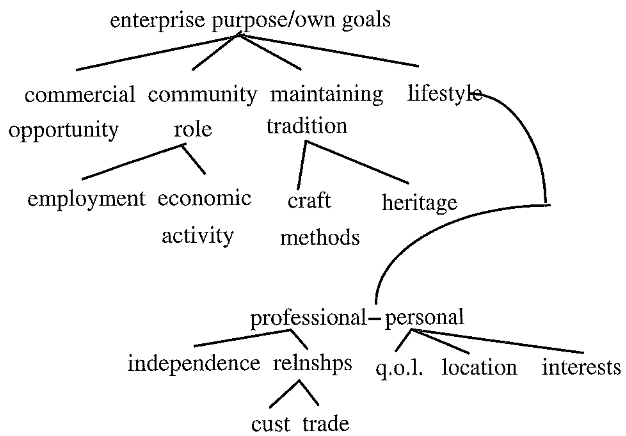
A second theme was concern over the nature of interpersonal relations with supermarket buyers : supermarkets were seen to change personnel which meant that getting access to the right person in the first place could be difficult, while good, on-going working relationships could be cut short. Changing personnel could also lead to problems of ignorance by supermarket buyers over products, resulting in loss of trust and goodwill. For example, one cheese-maker reported an instance of a supermarket buyer complaining that the natural mould on the cheese constituted a lack of hygiene and a health risk. Negativity towards supermarkets also appeared to stem, for some interviewees, from deeply held convictions over the generally damaging effect of supply chain concentration on rural economies and small-scaled producers such as themselves. To enter into relations with supermarkets therefore, was seen almost as a form of treachery.

Overall, interviewees were found to have a good understanding of their external environment, with supply chain decisions giving the greatest cause for concern. The results now turn to the question of how producers perceived their enterprises and the extent to which they oriented their enterprises towards the market.

3.4. Perceived Purpose of the Enterprise

Interviewees were forthcoming on the subject of the perceived purpose of their enterprises, talking in depth about their backgrounds, motivations and reasonings for being involved in their current livelihoods. Figure 1 gives a representation of some of the key ideas they expressed in this regard.

Figure 1 : Producer Perceptions of Enterprise Purpose and Own Goals



This Figure shows that producers conceived of their enterprises as providing four main purposes or objectives. First, there was the view that the enterprises offered a *commercial opportunity*. This was particularly prevalent amongst those who had set up their enterprises recently, and who had felt that their chosen line of business would be a feasible venture. However, this perception of commercial opportunity was balanced against other perceptions of the enterprise as *contributing to the local community* and *maintaining a local tradition*. For many producers, the ability to offer *employment* to local people was a strongly expressed feeling of satisfaction, in some cases resulting in an attitude of "duty of care" or paternalism :

"I get the greatest satisfaction, and the greatest pleasure out of offering people work. They won't become millionaires through working here, but ... I like to think there's some job satisfaction, they have a pride in what they do and also a pride in the products".

(Butcher, Cumbria)

Others talked of the importance of the enterprise in terms of its wider *economic activity*, attracting visitors and tourists, and generating wealth in an area with few private enterprises. The notion of the enterprise as a vehicle in which traditions of activity were being carried was also a clearly expressed idea. Strong pride in being faithful to old production methods, or persisting in the making of an unusual product were mentioned. This led to an unwillingness to contemplate modifying or changing the product, either to meet particular consumer needs or increase production efficiency :

"*We were taught how to make this cheese by someone who lived up the dale for 80 years. She told us what it tasted like and how it should be. ... We are hand-made and we couldn't automate anything because it would change the cheese".*

(Cheese-maker, Yorkshire)

Interestingly, views such as these were expressed both by those who had recently bought over or started up enterprises which involved the production of a traditional product, as well as those who were carrying on long-standing family businesses. In other words, for producers of traditional products, commitment to craft methods and ingredients did not appear to be a function of either the age of the enterprises nor of the interviewees themselves. In terms of producers' own goals, the notions of being able to pursue certain *professional* and *personal lifestyles* were also clearly expressed. The professional lifestyle for this type of producer involved the ability to be independent, to be one's own boss, as well as to build relationships with customers and trade partners based on honesty, trust and openness.

" *... over the years, you get people who say they are selling Angus beef but you know fine well it's not. There's always somebody like that in any profession. But I like to sleep at night ! You've got to have a trust between the customer and yourself, it's so important the confidence the customer has in you".*

(Butcher, Northumberland)

The notion of supplier relations based on trust, and of operating on ethical grounds contrasted quite sharply with interviewees' views of how individuals in mainstream supply chains were perceived to operate. These producers spoke of preference for informal relations based on a shared common understanding and purpose. Meanwhile, in terms of personal lifestyles, interviewees spoke of their enjoyment of a particular quality of life gained through their enterprises, as well as enjoyment of physical location and ability to pursue interests and beliefs which were personally important to them :

"*It is difficult to reach out to places further afield geographically from where we are, but I can honestly say I would not want to work or live anywhere else. You may not have seen too much of the surrounding area, but it is a fantastic place. The quality of life here is absolutely brilliant".*

(Baker, Yorkshire)

"*It certainly started off as a family lifestyle thing rather than a business, In fact, I've never really been comfortable with the idea of running a business and still am not, really. I don't get a kick out of it for the sake of business, it's because of the ideas and the business is a rather tedious bit that has to be got through to make it happen".*

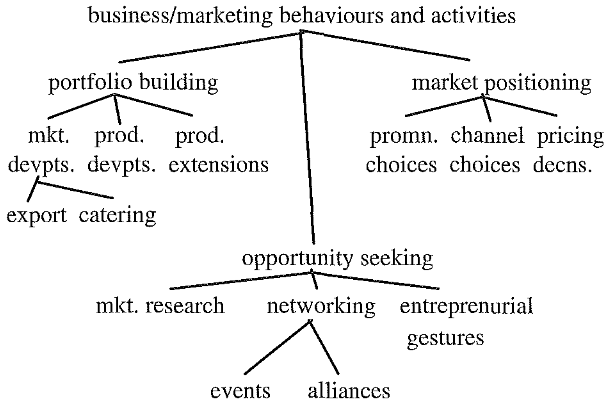
(Baker, Cumbria)

As these quotes demonstrate, the interviewees showed strong feelings and commitments to their livelihoods which were quite removed from notions of running a commercial operation, maximising growth and profits. Therefore, elements of an "artisan" mentality can be seen, which appear to contrast with the attitudes and motivations underpinning a market oriented mentality.

3.5. Evidence of Market Orientation

Findings thus far suggest that broadly, producers in this study have the characteristics of artisans. In the literature, such characteristics are often opposed to market oriented behaviour : producers who adopt "typical" craft activities and mindsets are considered unable or unwilling to orient their enterprises effectively towards the market. In this research however, interviewees described a range of business and marketing related activities which they were engaged in, and in such a way as to suggest that they also possessed something of the "mindset" of a market orientation. Figure 2 summarises the accounts of interviewees' behaviour in relation to the areas of business and marketing. This construct has been derived from scrutiny of interviewees' reports of the marketing activities they undertook, as well as reflection on the manner in which they described or conceptualised these activities.

Figure 2 : Producer descriptions of business/marketing behaviours and activities



As shown, interviewee descriptions of their business and marketing activities fell into three types of behaviour : *portfolio building*, *opportunity seeking* and *market positioning*. Each category represents a type of behaviour which is implicated in a market orientation. First, in terms of portfolio building, it was found that virtually all the producers had indulged in a fair degree of *product developments* and *extensions*. These appeared to comprise a favoured way of expanding operations after the first phase of growth amongst new start-ups. So, for example, the development of cheeses with different flavours, the creation of complementary product lines such as cured hams to go with bacon and sausages, and wax candles to go with honeys. New market developments, such as the supplying of catering outlets or expansion to exporting, were also common. Although these activities often appeared to be carried out in an unplanned fashion, sometimes in response to external inquiries, sometimes in an apparent "organic" evolution, this did not mean that the activities did not fit into current operations or enterprise strengths and weaknesses. This could be deduced from producers' descriptions, for example, of how product extensions were suited to meet the needs of particular consumer groups who were not being reached by existing offerings. Therefore, because of these interviewee perspectives, such activities are described as demonstrating portfolio building behaviour.

A second set of activities revolved around the keenness of producers to look for future developments for their business. A number of interviewees expressed the importance of knowing what customers want and keeping the finger on the pulse of changing market needs. In practice, interviewees tended to be unable to undertake any formal *market research* because of resource limitations, and where research activities were described, they tended to be conducted in an ad-hoc and informal way :

"*It's amazing because consumer attitudes and consumer knowledge is changing so much ... and people like us, we're got to know what we're talking about. I go out to the Women's Institutes and Women's Guilds during winter, I like doing this, I enjoy it because it's wonderful research and I get a view from the consumer".*

(Butcher, Cumbria)

Nevertheless, it was clear that most interviewees recognised the importance of market research and found ways to gather it despite resource limitations, both of which reflect aspects of a market oriented mindset. Interviewees also spoke of activities which may be described as *networking* - for example, attending trade events and participating in "Meet the [supermarket] Buyer" occasions - all of which demonstrated their interest in exploring future opportunities. Some interviewees also described how they worked in *alliance* or collaboration with other enterprises - either horizontally or vertically in the supply chain - in order to overcome particular problems. For example, one microbrewer had joined forces with three similar enterprises in order to gain sufficient collective volume of beer to interest a bottling plant in producing special bottles for them. In addition, there were a number of interviewees who reported trying out opportunistic and *entrepreneurial gestures* : for example, one fish smoker sent a "congratulations" card and a box of his products to the newly appointed director of catering for Great North Eastern Railways. Such activities represent a mindset open to opportunity, willing and actively engaged in looking for future possibilities. For this reason, they are described here as activities displaying *opportunity seeking* behaviour.

A third set of activities conducted by these producers are those relating to marketing mix decisions. With regard to *promotion*, it was found that interviewees in this research were highly diverse and at times very imaginative in their use of promotional tools, employing websites, trade fair displays, and a range of audio and printed media for advertising. *Channel* choices were also quite diverse from direct mail order to a range of catering and retail outlets. *Pricing* decisions tended to be based on cost, but there was widespread recognition throughout that products were competing at the top end of the market, which required a premium price. Throughout all mix decisions, it could be found that decisions being made were sensible from a "coherent mix" point of view. For example, the types of promotional tools - whether local radio during football matches for a microbrewer, or *Country Living* magazine (an up-market, glossy, monthly magazine) for a confectioner - tended to reflect a solid appreciation of the type of consumer being targeted. Similarly, channel choices reflected understanding of the market, with some producers shunning advances from supermarkets on the basis of not wanting to "cheapen" the specialist cachet of their products. Therefore, as the interviewees tended to make decisions which were generally very sound with regard to customers and competition, these activities are described as demonstrating *market positioning* behaviour.

Overall therefore, these producers showed themselves able to demonstrate aspects of market oriented behaviour, in the sense that aspects of the *mindset* of market orientation were readily apparent. The producers demonstrated that they possessed the external outlook and customer focus of a market orientation mindset, together with the predisposition towards opportunity and the ability to appraise the enterprise as a portfolio of assets. Although the producers had strong craft or artisan characteristics, in that they were committed to maintaining traditions and did not seek to maximise profits or growth, this did not mean that they were unable to think and act in ways which are classically market oriented.

4. CONCLUSIONS

This research has sought to investigate two key issues in the activities and experiences of speciality regional food producers : first, the perceptions they hold towards their marketing environment, particularly their customers, competitors and supply chain partners ; and second, the extent to which such producers exhibit market oriented behaviour, in the light of conflicting evidence from the literature about business orientation and mentality amongst craft or artisan producers.

In relation to the first question, it was found that the producers in this study perceived their consumers to be fairly high income earners, often located in geographically distant markets, and that competition is increasing from a variety of sources. The producers perceived problems of concentration in the supply chain which raised costs and restricted choice in their procurement and distribution activities. Producers tended to avoid distributing via supermarkets, either for economic reasons, or through a matter of principle. These findings are of interest to those involved in the support and encouragement of speciality food producers, as they suggest that supply chain management issues need to be prioritised. This prioritisation could take the form of assisting producers in the identification of, and negotiation with, suitable supply chain partners. In addition, individual producers could be encouraged to enter into further collaborations and alliances with one another to strengthen their position in the supply chain.

In terms of the extent of market orientation amongst speciality food producers, this study found evidence both of "typical" artisan mindsets and classic market oriented mindsets. On the one hand, interviewees showed themselves to be very committed to their products, and felt strongly about maintaining the integrity and tradition of their production methods. Interviewees also talked of their livelihoods in terms of lifestyle and community related objectives rather than in terms of commercial goals. This finding has implications for policy initiatives which assume that speciality regional food producers think and act like miniature versions of larger enterprises, seeking to maximise growth and profits. It may be that some speciality food producers have more in common with charitable bodies or not-for-profit organisations in their decision-making behaviour, and lessons may be learned from studies of these entities, as well as from the small business sector.

On the other hand however, producers in this study also demonstrated some mindsets and activities which are classically associated with market-oriented behaviour : that is, the ability to identify and act upon opportunities, the ability to perceive the totality of the enterprises' activities and find synergies within this, and the ability to make sensible and coherent marketing decisions based on an understanding of customer needs and competitive offerings. As such, these enter-prises tended to be quite successful from a commercial point of view, even though the producers themselves did not prioritise commercial objectives. This finding has implications for the efficient targeting of support resources, highlighting the need to match producers' capabilities and status with the most appropriate type of support or funding. Further investigation is needed of the contrasting mindsets and behaviours of speciality regional food producers, in particular, the sources and mechanisms of such behaviours, in order to allocate policy initiative resources more effectively.

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