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Retailers as societal gatekeepers: Beneficial to producers and consumers?

Congress sub-theme: DOWNSTREAM LINKAGES

Abstract

Society is increasingly putting pressure on producers to behave ethically and sustainably. But, what is the role of retailers in this area? The power of large supermarket retailers is growing at a global level and retailers are now operating as societal gatekeepers; the actions they are taking impact upon both producers and consumers. This paper focuses on a single case study from New Zealand (the removal of caged eggs from supermarkets), to assess whether retailer actions are ethical, sustainable, and beneficial to producers and consumers. Small food producers are particularly vulnerable; this paper concludes by recommending how producers could respond to retailer actions.

Key words: retailers; supermarkets; gatekeepers; consumers; eggs

Introduction

Global retailers have increasingly become the most powerful member of the agri-food supply chain. In recent years, these retailers have taken actions that, on the surface at least, promote their ethical and sustainable credentials. In 2018, examples include the removal of plastic bags from supermarkets in both Australia and New Zealand, the ban on sales of energy drinks to the under sixteens in the UK, and the removal of plastic straws and plastic-stemmed cotton buds from New Zealand supermarkets.

There is no doubt that some practices used in the production of food can damage ecosystems, contribute to climate change, deplete energy and create pollution (Iles, 2007; Swindley, 1990). Issues such as animal welfare and exploitation of human workers can also occur. Thus, there is an argument that retailers have a responsibility to try to address some of these important global issues. Swindley (1990) opines that retailers are agents of change, societal gatekeepers and opinion leaders. However, Swindley (1990) also states that the role of retailers is to reflect consumer attitudes and consumer demand. Youn et al. (2017) note there is often a gap between the intentions of consumers to engage in ethical consumption and their actual behaviour. Some authors claim that retailers, as societal gatekeepers, can narrow this gap and foster behavioural change (Gleim et al.,

2013; Lee et al., 2012). But does society want or expect retailers to act as their gatekeepers?

There is little doubt that global retailers are increasingly acting as gatekeepers, especially in the areas of ethics and sustainability. What has not been explored in the literature, to date, is whether the gatekeeping actions of retailers are in the best interest of producers and consumers. And if these actions are not in the best interests of others in the agri-food supply chain, then can they truly be called either ethical or sustainable? In addition, should consumer demand ultimately determine the products that are stocked by supermarket retailers? Is it ethical for retailers to reduce consumer choice? This paper examines these questions by considering an example of a recent gatekeeper action undertaken by New Zealand retailers; the phasing out of caged eggs.

Food Retailing

Food retailing has undergone considerable change in recent years. The first major change has been increased market concentration in the food retail sector (Clarke, Davies, Dobson and Waters, 2003). The emergence of very large retailers is being driven by mergers and acquisitions, as well as through international expansion. Dobson (2003) reports that the top ten retailers in the EU account for over 30% of all food sales.

Secondly, retailers have increasingly taken over wholesale and logistic functions, and thus source products directly from local or international suppliers (Nordas, 2008). Other authors have similarly noted that retailers have shifted from simply selecting products from food manufacturers, to undertaking a more active interest in other distribution channel activities (Collins and Burt, 2006; Varley, 2003).

Nordas (2008) describes the third change as the transformation of retailers from being a distributor of merchandise, to a role in which they create value for consumers through the provision of services and a broader range of products. This includes value such as providing information about how a product has been produced or stocking environmentally friendly products. Dixon (2003) notes that retailers provide value by promoting standards or principles of judgement to apply to food decision-making.

Connected to these significant changes, has been the increase in power that retailers hold over others in the food supply chain. Cox et al. (2002) state that food manufacturers are in a weak position vis-à-vis their major customers – the supermarkets. The agri-food supply chain has moved from manufacturer ‘push’ to retailer ‘pull’. Burch and Lawrence (2005) argue that the organisation and management of the agri-food supply chain in developed nations has shifted to the retailers. In the European context, Dobson (2003) opines that power in supplier-retailer relationships lies with food retailers; retailers have scale and control of purchases, meaning they can dictate terms and conditions to food suppliers. In addition, retailers are seen by consumers as having legitimate power in matters relating to food. Dixon (2003) argues there is a perception that retailer actions are legitimate; this legitimacy allows them to dominate discussions on acceptable production practices. She asserts that supermarkets are viewed by consumers as pre-eminent food authorities.

Food Retailers as Societal Gatekeepers

Esbjerg, Burt, Pearse and Clanz-Chanos (2016) state that through their ownership and control of shelf space, retailers are key gatekeepers in the food sector. Other authors have similarly noted that retailers are increasingly an important gatekeeper between the food industry and consumers (Burt and Sparks, 2003; Caizza and Volpe, 2013; Dobson, 2003). Retailers decide which products will have shelf space in their stores, and from these consumers make their individual purchase choices. Lai et al. (2010) stated that retailers are important gatekeepers as they determine product standards, communicate with consumers, and provide consumer information back to suppliers.

Busch (2011) describes the food supply chain governance as occurring due to retailers at the end of the supply chain imposing their criterion on businesses further upstream. In order to establish their status as food authorities in the minds of consumers, retailers demonstrate their ability to dictate the conditions of agri-food production. Similarly, Dixon (2003) argued that retailers exert leverage by establishing themselves as pre-eminent food authorities; her research suggests this generates consumer loyalty and influences consumer preferences.

As gatekeepers, there is no doubt that global food retailers have driven significant improvements. For example, Morris and Young (2000) state that retailers have been instrumental in defining quality and implementing quality assurance systems. Indeed, some quality assurance initiatives in the fresh produce sector have been developed and led by retailers to ensure food quality and safety; these include Eurep GAP 2000 and the Global Food Safety Initiative (Sterns, Cordon and Reardon, 2001). This demonstrates the emerging role supermarket retailers have as a part of the regulatory framework governing production standards and quality (Burch and Lawrence, 2005).

Nordas (2008) also notes that retailers are actively involved with manufacturers and farmers through the setting of product standards, the promotion of products, and sharing information on consumer trends. Retailers have been particularly focused on sustainability in recent years. Freidberg (2003) suggested that UK supermarkets have joined initiatives, such as Ethical Trading, as a way to demonstrate their own commitment to social welfare and environmental standards. Iles (2007) lists some of the sustainable actions taken by British supermarket chains: Sainsbury will only source seafood from certified Marine Stewardship Council (MSC) fisheries and produce from farmers who use integrated crop management; Tesco will source milk and meat from farmers who protect biodiversity habitats; and Marks & Spencer will screen food products for the presence of toxic chemicals to phase these out. In the US, Wal-Mart has invested in energy conservation, efficient lighting, and recycling (Iles, 2007). In 2000, Carrefour implemented a sustainability programme focused on economic viability, social responsibility and environmental stability (Youn et al., 2017).

Esbjerg et al. (2016) state that brand reputation is sacrosanct to retailers. The gatekeeping decisions made by retailers are a way for them to display their market position and their credibility as socially responsible organisations. It has been argued that retailers have two main perspectives with regard to social responsibility: the first is to behave in a legal, ethical, moral and responsible way, and the second is to provide society with the retail facilities it requires (Dawson, 1987). The latter responsibility includes improving the living standards of society and providing a range of retailing types that all consumers have access to (i.e. the poor, the elderly, the non-mobile, and the young). Swindley (1990) suggests that social responsibility also entails retailers refusing to stock products

from countries or producers which are believed to behave in a morally undesirable manner.

The Demise of Caged Eggs in New Zealand

There are currently four distinct systems for egg production in New Zealand: conventional caged, colony caged, barn, and free range (Animal Welfare Advisory Committee, 2012). Conventional cages refer to plastic or metal enclosures in which 3-7 chickens are housed at a rate of 550cm² of space per chicken; these birds have no access to perches, scratch pads or nesting boxes. Colony cages are enlarged conventional cages in which there is at least 750cm² of space per chicken and they have access to perches, scratch pads and nesting boxes. The differences between the systems mainly relate to animal health, the ability to display natural behaviours, and the costs of production. Multiple studies have reported that free range production costs are somewhere between 39-69% greater than the production costs of caged eggs (see Bell, 2006; Elson and Little, 2004; Fisher and Bowles, 2002; Van Horne et al., 2007). Various studies have also found that no single production system is best for animal welfare; there are trade-offs between the advantages and disadvantages for barn, free range and caged chickens (Dikmen, Ipek, Sahan and Sozcu, 2016; Lay et al., 2011). For example, caged chickens have reduced mortality and cannibalism, with better footpad health and disease-free status. Free range chickens have better feather/bone characteristics, reduced osteoporosis, and better ability to display natural behaviours.

In 2012 the Animal Welfare Advisory Committee announced that conventional cages must be phased out by 2022. At the time of this governmental decision, approximately 80% of the total eggs produced in New Zealand were arising from conventional caged hens (Bicknell, 2011). Despite the estimated costs of \$150-200 million to convert to the newer colony caged systems (National Business Review, 2014), egg producers have begun the work required to phase out conventional cages.

The two major supermarket chains in New Zealand, Progressives and Foodstuffs announced in 2018 that they would stop selling all caged eggs in their stores (NZ Herald, 2018). This ban includes those eggs that are produced using the newer colony caged systems that are permitted by government regulations and that producers were

encouraged to switch to by the Animal Welfare Advisory Committee. All eggs produced by caged systems will be phased out of Progressive stores by 2025 and from Foodstuffs stores by 2027. This is likely to have a significant impact on producers and consumers, as around 50% of eggs in New Zealand are sold through supermarket stores (MAF, 2010).

In addition, recent research with New Zealand consumers found that almost 60% of eggs being purchased today are produced using caged systems (Craig, 2018), whilst Nielsen (2018) scanner data reports that closer to 70% of eggs sold come from caged chickens. Per capita consumption of eggs has increased among New Zealanders in recent years, to a figure of 226 eggs on average per person each year (Bicknell, 2011). It should also be noted that eggs produced through caged systems are one of the cheapest sources of protein available to consumers. Caged eggs are priced at between 4 and 5.4 cents per gram of protein, whereas barn or free range eggs cost around 8.5 cents per gram of protein (Egg Producers Federation, nd). Tofu, meat and dairy products are typically more expensive sources of protein than caged eggs. There is no doubt that the removal of all caged egg products from supermarkets will result in higher prices for New Zealand consumers.

Countries such as Austria, Germany and Switzerland have also moved away from caged chickens and only non-caged eggs are available in stores (Agra CEAS Consulting, 2004). Retailers, with government support, were instrumental to this 1990s change. However, data indicates that egg consumption per capita has fallen as a result of this change. In addition, imported egg products, such as egg powder, have risen in the same time period (Agra CEAS Consulting, 2004).

Discussion

The decision by the two supermarket chains in New Zealand suggests that they believe they have a greater understanding of the pros and cons of the various egg production systems, than the government's animal welfare legislators who judged colony caged systems to be acceptable and legally permitted. It is difficult to see that this would indeed be the case, and thus we would argue that the retailers have made a decision without a complete understanding of the various housing systems and animal welfare. It is also

possible that the retailers have made this change so they can signal to their consumers that they are influencing animal welfare.

The retailers have acted as societal gatekeepers in this case; they have dictated the conditions and production standards for eggs (Burch and Lawrence, 2005), and they have presented themselves as a food authority to consumers (Dixon, 2003). The retailers might, at least in part, have been swayed by a minority of consumers who are very vocal in their campaigns to improve animal welfare. This vocal minority, however, are not necessarily knowledgeable about the pros and cons of the various housing systems either. There is little evidence to suggest that hens in colony cages have reduced welfare when compared to those that are free range or barn housed. Indeed, uncaged hens have been found to have higher rates of mortality and disease (Dikmen, Ipek, Sahan and Sozcu, 2016; Lay et al., 2011). Supermarkets in the UK are also planning a ban on the sale of eggs from caged systems; the government's chief veterinary officer, Nigel Gibbens, has condemned these plans due to the higher risk of disease amongst free range hens (Independent, 2018).

This banning of caged eggs by retailers has a significant impact on egg producers in New Zealand. Egg producers were firstly impacted by the changes to animal welfare legislation and as they were responding to this via a massive investment in colony caged systems, the retailers then mandated that eggs from these systems would no longer be stocked. As previously reported, the cost of producing eggs using barn or free range systems is higher than colony caged systems, and this will affect the ability for producers to make a profit or even to stay in business. Research relating to the animal welfare code changes reported that approximately 30% of producers would exit the egg industry (Harris Consulting, 2013); the impact of the retailer ban is likely to increase the number of producers who choose to exit. We argue that any behaviour that drives egg producers out of business is not in fact ethical. In addition, a far greater land area will be required to produce eggs. As the land area available for food production in New Zealand continues to decrease (www.stats.govt.nz/news/land-report-highlights-issues-with-soil-degradation), we argue that it is not sustainable to make a change that will require more land to be used to produce the same volume of eggs as are being produced today on a smaller land area.

This retailer driven change will not only affect egg producers; it will have a significant effect on New Zealand consumers too. Whilst many studies have found that consumers believe that barn or free range hens have better animal welfare (Goddard et al., 2007; Lopez-Galan, Garcia and Barreiro, 2013; Parker, 2013), there is a gap between purchase intentions and actual behaviour. This gap is clearly shown by the fact that 60-70% of eggs that are purchased by New Zealand consumers are from caged housing systems. We opine that this gap is driven by one product attribute, price. As previously noted, the price of barn or free range eggs is double that of eggs produced in caged systems (Bicknell, 2011; Harris Consulting, 2013; MAF, 2010; Nimmo-Bell and Company, 2010). Sargent (2018) noted that consumers want to do the right thing in terms of animal welfare, but the higher price prevents them from buying the more expensive barn or free range eggs. With this change, the supermarkets have prioritised better animal welfare over the economic impact on New Zealand consumers. Thus, this change cannot be thought of as ethical, because the largest consumers of eggs in New Zealand are people with lower incomes, those with large families, and those of Maori, Pacific Island or other non-European ethnicity (Nimmo-Bell and Company, 2010); this change will most harm those who are already struggling financially. Research has found that those in the lowest income group spend 0.035% of their household income on eggs, whilst consumers in the highest income group spend 0.015% of their income on eggs (Bicknell, 2011).

Evidence from Austria, Germany and Switzerland, where retailers banned caged eggs during the 1990's, suggests that egg consumption will decrease when the cheaper options are removed from the supermarket shelves (Agra CEAS Consulting, 2004). As alternative protein sources are priced similarly to barn and free range eggs (i.e. cents per gram of protein), it is likely that New Zealand consumers who relied on eggs for protein will instead consume greater levels of cheap carbohydrates or high fat foods. Those who will be hardest hit by the increase in the price of eggs will be low income consumers. We argue that this may have a negative impact on the health of consumers, in a country already struggling with high levels of obesity and diabetes. Aside from the predicted negative impact on the health of consumers, we also argue that the retailers are taking choice away from consumers and not allowing actual demand in the marketplace to determine the products they stock.

Conclusions

This paper has examined the changing role of powerful retailers in the agri-food supply chain and their role as societal gatekeepers. Whilst these retailers promote themselves as ethical and sustainable, we provide evidence through our analysis of a single case in New Zealand, that their actions are not always beneficial to producers or consumers. For instance, we do not believe that it is sustainable to force a change on producers that will harm them financially and might even drive them out of an industry. We believe it is likely that the increased cost of production will be carried by the producers or will be passed on as an increase in price to the consumer; we argue that the retailers will not be affected financially and indeed, they are likely to obtain a higher margin on non-caged eggs. In addition, we do not believe that it is ethical to manipulate natural supply and demand in a marketplace, and nor is it ethical to force consumers to purchase higher priced products. This is especially true for a product such as eggs that are highly beneficial to the health of consumers; this will particularly impact lower income consumers.

In terms of ethics and sustainability, supermarkets appear to only be targeting those suppliers with little power to push back. For instance, UK supermarkets banned energy drinks on the proviso of concern about sugar consumption in children; yet high-sugar products such as Coca Cola and flavoured milks remain on sale. And the supermarkets continue to sell alcohol and tobacco products that have been proven to be harmful to the health of consumers. Is it ethical to push these products, and yet ban eggs that come from caged hens? This suggests that supermarkets care more for animal welfare than they do for human wellbeing. We are not suggesting that supermarkets remove all potentially harmful products from their shelves as this would limit consumer choice and we argue that consumers have a right to choose the products they wish to buy. Rather, we are making the point that by banning caged eggs from their shelves, the retailers are limiting consumer choice and ignoring current demand data. We also question why the retailers are targeting the egg industry in particular. If they are concerned about animal welfare, then there are other industries that they should also be targeting, including pork and dairy sectors.

So, what can small producers do if supermarkets, in their gatekeeper role, start to target their industry? Individual small producers can do very little against the power of the

retailers. But, industry bodies, representing all producers, need to step forward and collectively battle the retailers. For example, in our case on the egg industry in New Zealand, the Egg Producers Federation could lobby the government about the change being forced on them by the retailers. They could approach this in two ways: firstly, the impact this will have in terms of producers leaving the industry and possibly resulting in a shortage of supply, and secondly in terms of the negative impact that higher priced eggs might have on the diets of New Zealanders and the resulting increase in health issues such as diabetes and obesity. The Egg Producers Federation could also play a role in terms of educating consumers about the pros and cons of the various housing systems; this would highlight some of the issues with barn and free range systems and help to quieten the vocal minority who are so outspoken against caged systems. The industry could also, collectively, tell the supermarkets that they are not going to change their housing systems (apart from the government mandated phase out of conventional cages). If every producer took the same stance, there would not be enough barn or free range eggs available to meet the demand of supermarket customers. Supermarkets would not wish to deal with hundreds of angry customers faced with empty egg shelves. Finally, if the retailer change does go ahead, the Egg Producers Federation, in conjunction with the government, should fund promotional campaigns to highlight the need for consumers to include protein in their diets. This might help to ensure that egg consumption does not decrease, as was witnessed when caged eggs were removed from stores in Austria, Germany and Switzerland.

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