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Emerging market for sustainable food in Bangkok

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Abstract

More and more food is traded all over the world, changing the general pattern of food production and consumption dramatically. This transformation includes increasing consumer demand for safe and environmentally friendly produced food. Food is no longer produced only by farmers in the vicinity where consumers can easily observe how they produce their food. Nowadays, food can be produced in Asia and presented on a supermarket's shelf in Europe, this unknown origin makes consumers more concerned about the safety of their food. Food scandals such as mad cow disease, bird flu, and GMOs make consumers concerned, uncertain and worried about their food. In response to these concerns, modern retailers in many countries improve their sustainable development policy and actively increase the provision of sustainable food. As a newly industrialized country in Southeast Asia, Thailand can be expected to witness a similar increasing domestic demand for sustainable food products, particularly in its urban areas. The general patterns of global change affect Thailand as well, but the specific processes of change differ due to specific conditions of urban Thailand. This paper analyzes the process of change towards sustainable food provision in Bangkok by investigating how consumers and the system of provision interact in retail outlets.

Keywords: Sustainable food, Consumption, Retailer, Thailand

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1. Introduction

The process of global modernity is changing food consumption in many parts of the world. Supermarkets have become the model of been modern food retail all over the world, starting from the developed countries such as USA in 1930s (Zimmerman, 1941; Lawrence and Burch, 2007; Ellickson, 2011), UK in 1950s (Lyon et al., 2004; Alexander et al., 2005; Bailey et al. 2010) and Western Europe in 1960s (Oosterveer, 2011). As Hu et al. (2004) and Traill (2006) argued, supermarkets are no longer places where only rich people shop as over last few decades the supermarket have widely spread to the developing regions such as Latin America in 1980s (Reardon and Berdegue 2002; Reardon et al., 2005) central and eastern Europe in 1990s (Dries et al., 2004), South East Asia in mid to late 1990s (Reardon and Gulati, 2008), and China, India, Vietnam in late 1990s to early 2000s (Reardon and Gulati, 2008). The common patterns of this modernity are for example the extensive investment by foreign retail chainsand the dramatic rise in market share of the supermarket, makingsupermarkets the key food providers (Dries et al., 2004; Oosterveer, 2011).

Oosterveer et al. (2007) argue that the supermarket also took up a dominant role in the distribution of sustainable food since the 1990s. Supermarkets dominate the sales of organic food in Switzerland and in the United Kingdom and control 90 percent of sales in Denmark (Raynolds, 2004). Supermarkets also appear to be taking the lead in developing organic markets in Canada and Japan (Kortbech-Olesen et al., 2003). Several developing countries, including Argentina, Brazil, Chile, China, Egypt, India, Malaysia, the Philippines and South Africa, are also developing significant domestic markets of organic food (Kortbech-Olesen et al., 2003). Besides mainstream supermarket, small alternative shops remain very popular and handle still some 50 percent of organic sales in the Netherlands (Schear, 2009). Farm stalls and box schemes are flourishing in many parts of Europe and account for nearly a quarter of the German organic market (Schear, 2009). According to Figure 1, the global market for organic food and drink has increased constantly between 2002 and 2006.

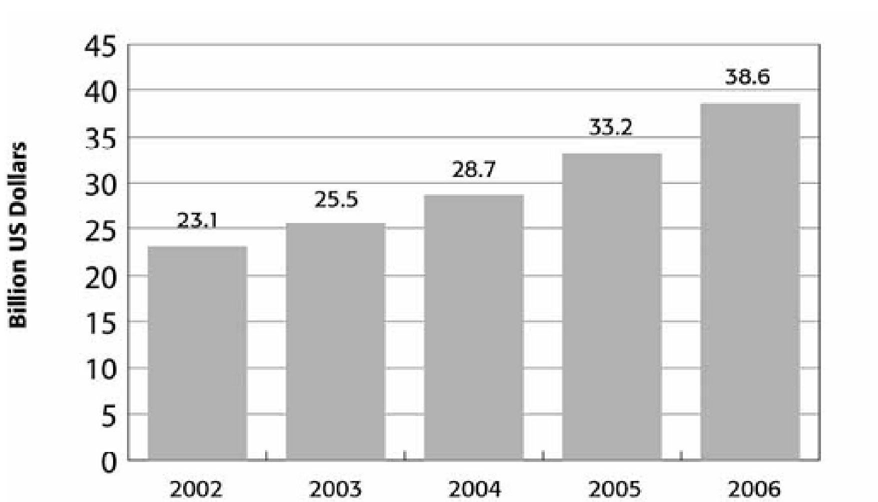

Figure 1. Growth of the global market for organic food and drink 2002-2006 (Billion US Dollar)
Source: The Global Market for Organic Food & Drink, Organic Monitoring 2007 (Schear, 2009)

A transition towards sustainability in food provision can be achieved in various ways, which may differ from country to country. In some countries, like the UK, retailers have taken a lead in developing sustainable food provision. The supermarkets in the UK set environmental standards in the supply chain, covering quality control, information dissemination and carbon footprints. In Germany, the government has played a major role in food sustainability since the BSE crisis. In the Netherlands NGOs keep an eye on the retailers and have launched campaigns for more sustainability (Oosterveer, 2011). This globalization of sustainable food maybe expected to also influence recently developing economies like Thailand, especially in the urban centers. This paper investigates this process of emerging sustainable food consumption in urban Thailand.

Section 2 specifies the research question for this study. Section 3 describes the research on sustainable food providers in Bangkok while section 4 of this paper describes the research on consumers in Bangkok. The conclusions are presented in section 5.

2. Background

The food market in Bangkok has developed from traditional to a combination of traditional and modern sectors. Until the 1970s, fresh markets accounted for hundred percent of all food retail in Bangkok (Yasmeen, 2000). After that, the modern food retail in Bangkok has spread and most rapidly since the late 1990s (Tokrisna, 2005). Stores of transnational supermarkets chain such as Carrefour, Tesco Lotus, and Casino seem to be everywhere in Bangkok.

In Thailand, most of foods are produced in the rural area, processed by food factories and sold by the providers. At the end of this food supply chain, there is a consumer in the city who does not know the sources of his food and how it was produced. Food scandals such as pesticide-use, bird flu, and swine flu make consumers in Bangkok start questioning the safety of the food sold in the stores and whether it can be trusted. The urban lifestyles may also increase psychic tension and create physical problems, which make people in Bangkok pay attention to health issues. Consumers in Bangkok are modernized, urbanized, relatively rich, and rather concerned about food safety (Kantamaturapoj, 2012).

This paper focuses on both providers and consumers to study the emerging market for sustainable food since any increase in sustainable food consumption requires both providers and consumers to change their strategies and concrete behaviour. Providers may influence the level of sustainable food consumption of by offering green food products. They play a powerful role in creating and expanding the market, because they can also influence and lead other actors, such as farmers and producers, in the supply chain (Konefal, 2007). Consumers also have an important role to play since they may use the green (food) alternatives offered to them by providers, or not. Our two main research questions are therefore; 1) what different retailer strategies can be identified to increase sustainable food consumption? and 2) how can these strategies be better attuned with consumers?

The consumption junction or the place where providers meet consumers, such as the retail outlet is the focused area for this study. A combination of qualitative and quantitative research methods was applied to investigate sustainable food provision in Bangkok.

3. Provider strategies

Sustainable food in Bangkok is sold in both niche and mainstream markets. The niche markets are primarily specialized shops. The specialized organic food shop in Bangkok was firstly introduced in 2001 and their number increased from 6 in 2008 to 25 in 2010 (Table 1). Compared to the total population of Bangkok, specialized shops are still only a small section of food provision (Table 1).

Table 1. Population and number of specialized shops in Bangkok

	2001	2008	2010
Number of specialized shops in Bangkok	1	6	25
Number of open markers organized by Green Market Network	0	1	6
Number of populations in Bangkok	5,726,203	5,710,883	5,701,394

In general, specialized shops in Bangkok are small scale, mostly managed by one owner and some assistants. These specialized shops are located in various areas of Bangkok, generally in the houses of the owners, who therefore did not have to purchase or rent a building to establish their shops. Specialized shops give the impression of fitting into the particular lifestyle of living with nature and peacefulness. Selling sustainable food is their major business.

The mainstream channel for selling sustainable food is the supermarket, which mostly belong to retail chains but also have considerable autonomy. The number of supermarkets in Bangkok had rapidly increased from 109 in 1997 to 545 in 2010 (Table 2).

The supermarkets in Bangkok can be divided into two groups; national and multinational supermarkets. Supermarkets sell both conventional and sustainable food. Therefore, sustainable food is considered only part of their business. Although both specialized shops and supermarkets provide sustainable food for consumers in Bangkok, they represent two different regimes for sustainable food provision. They have different organizational structures, strategies and expectations about the role and contribution of other actors in the food supply chain. The two regimes also have different ways of targeting consumers when selling sustainable food. This section presents a concluding discussion of the two types of providers by looking into their ways of organization, their expectations with respect to the roles of other actors and the future of green food provision.

Table 2. Numbers of stores from major retailers in Bangkok from 1997–2010

Retailer	Type	Number of Stores*					
		1997	2002	2004	2007	2008	2010
National Retailer							
TOPs	Supermarket	27	52	48	92	62	88
Villa Market	Supermarket	8	8	8	11	12	15
Foodland	Supermarket	7	8	8	9	10	10
Jusco (Max-value)	Supermarket	8	14	10	7	10	10
Home Fresh Mart**	Supermarket	7	8	8	9	8	8
Gourmet Market**	Supermarket	Not yet open	Not yet open	1	2	2	3
Golden Place	Supermarket	Not yet open	4	4	4	4	5
Multinational Retailer							
Tesco Lotus	Hypermarket/ Discount Store	12	43	48	96	202	343
Big C	Hypermarket/ Discount Store	19	33	37	54	26	26
Carrefour	Hypermarket/ Discount Store	6	17	19	27	23	28
Makro	Hypermarket/ Discount Store	15	21	23	41	8	9
TOTAL		109	208	214	352	367	545

Note: * Every size of store is included.

**Operated by the same company

Source: (Foodland 2008; Shannon 2009; GourmetMarket 2011; TOPs 2011; VillaMarket 2011)

In a focus group discussion representatives from the specialized shops discussed and assessed a number of different strategies that could be applied when trying to sell green food to consumers in Bangkok. We found that the organization of the specialized shop network is primarily informal. The shop owners have realized that one shop alone has no substantial power to negotiate with other actors in the supply chain. They therefore regard the other specialized shops as allies, rather than business enemies. This has led them to form the “Green Market Network” to work together and empower individual shop owners. A few successful specialized shops took the lead in the organization, supported by the others. The major tasks of the network are to procure sufficient and reliable sources of sustainable food for the individual shops, to improve their businesses by learning from each other's experiences and to expand the market for their products. Their main task is to locate reliable suppliers to supply real sustainable food to the shops in the network. The specialized shops are not focused on certification but, instead, they rely on trust: going to the farms and seeing the way food is produced with their own eyes. As a result, they are confident about the products they sell and can pass this trust onto their customers. Trust in sustainable food is primarily generated by personal interactions. Members of the Green Market Network also give each other advice about feasible forms of shop management, reliable suppliers, best-selling items, etc. They consider learning from successful shops is better than trying new things by themselves, especially for shops that have recently opened. They also seek to find new markets by introducing sustainable food to the patients in hospitals and to people who care about their personal health. There is little distance between the specialized shops and their consumers. The specialized shops' staffs communicate with consumers in an informal and friendly way, talking directly to them in the shop and organizing activities with them. The specialized shop owners expect that their consumers are willing to learn more about sustainable food and prepared to buy sustainable food based on the trustworthy information about sustainability that they are offered. This makes the specialized shops proactive in giving information to consumers, as shown in their efforts to organize events such as fairs and open markets. The specialized shop owners regard themselves and their organization as well-defined and well-established. They believe that they do what they have to do energetically and do not compare themselves to the mainstream retailers. They do not feel lagging behind the supermarkets that offer modern, imported, certified, sustainable, food. They are self-confident about their own way of realizing (green) growth. Instead of growing in terms of quantity, the specialized shops would rather be 'small, specialized and beautiful' and develop their own network further. They agreed that other, more mainstream strategies such as mass media dissemination and price reduction could be effective in enlarging and diversifying their consumer base, but they also indicated that such strategies are beyond their capacity to organize. They believe that outside support from producers and the government is necessary if they are to become a more mainstream channel for green and healthy food provision. This analysis of the present position and strategies of the specialized shops suggests that they will continue to play a role in providing sustainable food but are likely to remain a niche market for the time being.

Four in-depth interviews were carried with representatives of supermarkets in Bangkok; the Mall Group (operator of Gourmet and Home Fresh Mart supermarkets), Carrefour, Foodland, and Golden Place. The result of these interviews revealed that the supermarkets saw themselves as actors operating in a global business system characterized by increased competition for green business.stekramrepus fo noitazinagro ehT
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4. Consumers in urban Thailand

Urban consumers were studied to determine the way in which they define sustainability and how they evaluate providers' strategies. Focus group discussions and questionnaire survey were combined to explore consumers in urban Thailand.

It was decided to set up two separate focus groups; one with green consumers and the other with general consumers. This was done in order to reduce heterogeneity among participants because this could lead to poor communication between group members and even to conflict. The target was to have ten to fourteen participants in each focus group. This size would not inhibit all participants to express their opinion, yet allow a division of the participants .stnemngissa cificeps rof spuorg-bus otniThe focus group discussion started with a presentation of possible strategies for selling more sustainable food (obtained from the focus group discussion and interviews with providers in Section 3). Then the participants were separated into three sub-groups and asked to discuss the benefits and advantages of these strategies and to rank them. Lastly, in the plenary session their findings were presented to draw a conclusion. The focus group discussions found that the consumers who regularly shop in specialized shops differ from consumers who regularly shop in other places. The specialized shop consumers have an optimistic view on the growth of sustainable food because this contributes to health and has benefits for the environment and the local community. In the focus group, these green consumers gave top priority to information dissemination. They believed that consumers would be more willing to buy sustainable food if they knew the reasons for they have to pay a higher price for it. However, the results from the focus group with the general consumers in Bangkok were different. They were less optimistic about the future of sustainable food and their priority when expanding the market for sustainable food was a reduction of price, even for those with a high income.

Then, we explored the consumers in urban Thailand on a larger scale through a large survey to obtain a clearer picture of the consumers in Bangkok. The respondents included 450 consumers. Based on the results from the focus group discussion, we assumed that consumers could be divided in different groups on the basis of two factors. The first factor was the place where they shopped for food as specialized shop consumers seemed different from other consumers. The focus group discussion with the general consumers found that they generally considered price first when buying food, so we also assumed that people who shopped in upscale supermarkets would differ from people who shopped in discount stores. As a result, three types of consumers were selected as samples for the survey. These three groups of consumers were i) specialized shop customers who always shop in green stores, ii) high-end supermarket customers who always shop in upscale supermarkets, and iii) discount store customers who always shop in discount stores. The awareness, practice, and perspective of these three groups of consumers were further investigated.

The survey results confirmed the differences between the green consumers (specialized shop customers) and the conventional consumers (high-end supermarket customers and discount store customers) in terms of awareness and knowledge on sustainable food, and their view on providers' strategies. However, we were not able to make a clear distinction between the high-end supermarket customers and the discount store customers. Based on the survey results, we can only confirm the existence of two groups of consumers in Bangkok with regards to sustainable food consumption: the green consumers and the conventional consumers. The general characteristics of both groups of consumers, including the commonalities and differences, are described in this section.

Green consumers in Bangkok are mature, have a high education level, and dispose of high incomes. The survey found that they are primarily health concerned and look for information from the shop staff, at the information bar in the shop, and on the package. Green consumers have substantial knowledge about sustainable food, so they are able to recognize sustainable food and distinguish between the certifications for organic, hydroponic, and hygienic food. Moreover, they realize the health benefits of sustainable food, so they understand why they have to pay extra for safer food. Conventional consumers in Bangkok are young, with high education and medium income levels. When buying food their first priority is price. They have little knowledge about sustainable food as they cannot distinguish between organic, hydroponic, and hygienic food nor do they know much about food labelling.

From the survey, we also found that the green consumers and conventional consumers in Bangkok share several commonalities. First, both of them tend to shop in modern retailers like specialized shops and supermarkets. Second although the education and income of green consumers is slightly higher than for the general consumers, they do not differ too much and they can all be categorized as middle-class. Third, they have similar eating habits and eat typical Thai foods such as rice and sidedishes for three meals a day. They sometimes eat at home and regularly outside. Finally, in terms of their awareness green consumers and conventional consumers are not much different. In general, both of them are aware of the relevance of health, food safety, and environment (Figure 2).

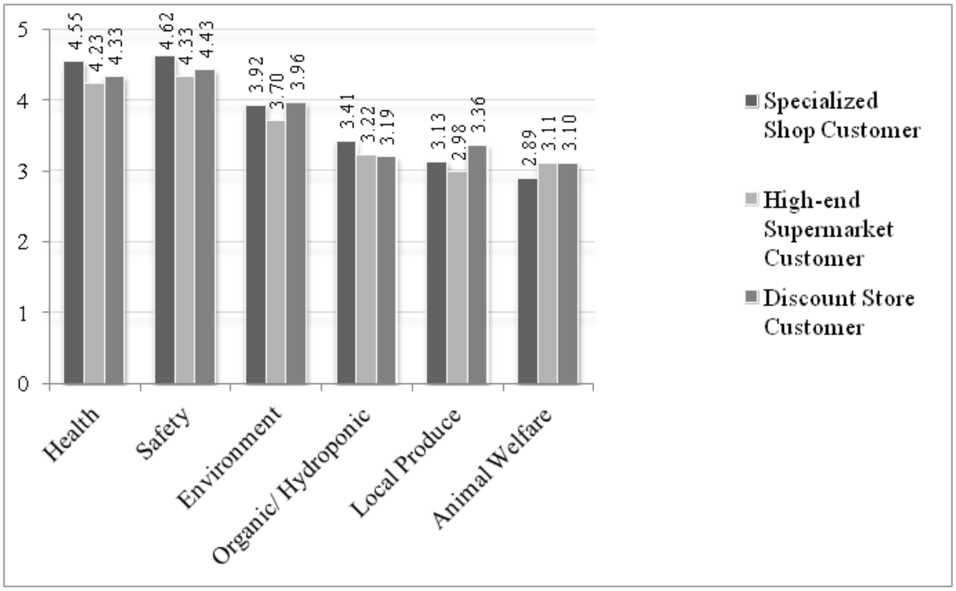

Figure 2. Awareness of consumers when buying food (Kantamaturapoj, 2012)

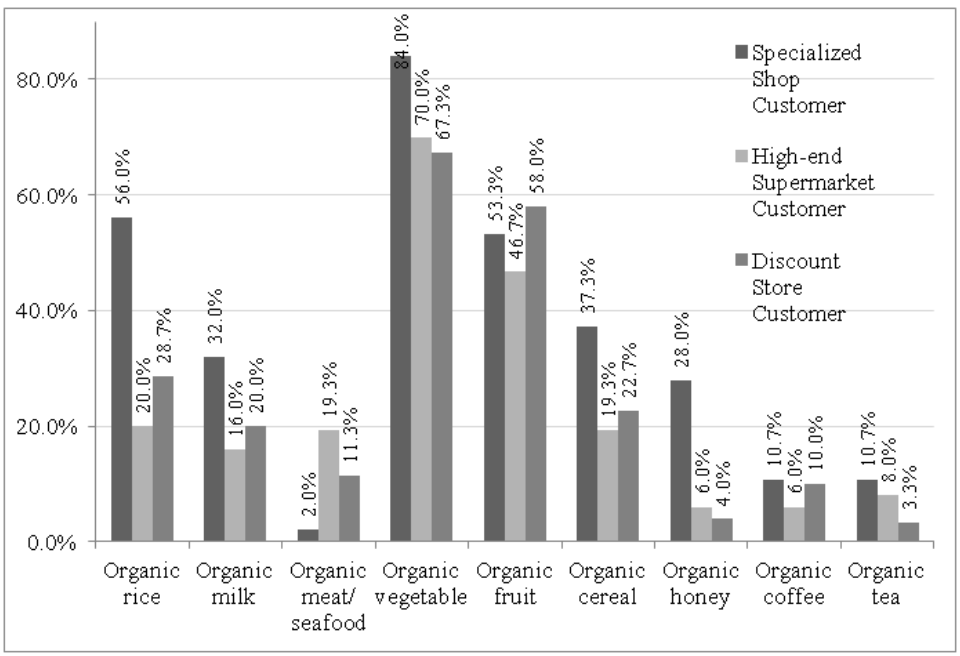

Figure 3. Experience of buying sustainable food of each group of consumers (Kantamaturapoj, 2012)

Besides on knowledge and experience, green consumers also differ from conventional consumers on their views of providers' strategies is. Green consumers look primarily for health and environmental information, matching the information strategy very well. Conventional consumers always calculate the price of food before deciding to buy it. Thus, the strategy aiming at reducing the price suits them better.

We can conclude from the focus groups and the survey that both green consumers and conventional consumers in Bangkok are from the middle classes and have the purchasing power to buy sustainable food. Green consumers are concerned about health, have particular knowledge about sustainable food, and regularly buy sustainable food in the specialized shops. The conventional consumers have the purchasing power to buy greener food and are concerned about health as well but they still keep buying conventional food in the supermarket.

5. Conclusion

The sustainable food sector in urban Thailand is not highly dynamic. Specialized shops in Bangkok already perform well in presenting a green profile and selling green products to a specific, but limited, group of consumers. Supermarkets are however are still modest in offering sustainable food. Their assortment and the proportion of sustainable food available in the supermarket are limited and invisible to the consumers. These failures of providing sustainable food in the supermarkets have four reasons, according to this research. First, the sustainable food assortments available at the moment in the supermarkets do not match the eating lifestyles of most consumers because many are not basic Thai foods. The western sustainable foods, which are available, do not fit the eating preferences of consumers in Bangkok. In this situation, consumers in Bangkok do not have much possibility to go for green shopping. Second, the supermarkets in Bangkok, especially the national ones, are passive and wait for government regulation on sustainable food. Unlike the multinational supermarkets that receive instructions on their sustainable food policy from the mother company, the national supermarkets did not know how to provide sustainable foods because they lack knowledge about sustainable food and how to implement certain guidelines. Third, supermarkets have low expectations of consumer demand for sustainable food. Although, they do not oppose sustainable food, they do not expect consumers in Bangkok to change and buy only sustainable food. They do not want to rapidly move forward because they do not see the commercial challenge. By contrast, they would rather respond to the demand; if consumers request more sustainable food, they will offer it. Fourth, the green concerns of consumers in Bangkok are not broad. In most cases, consumers eat sustainable foods because of health reasons and not for other aspects of sustainability such as the environment and social development.

Besides through specialized shops and supermarkets, we may expect that sustainable food can also be provided through other channels. Most consumers in Bangkok do not have enough time to cook and they normally eat outside their home in food courts and restaurants. This study did not include them since sustainable food is not provided in food courts and there are only a few organic restaurants in Bangkok. For the future research, it would be interesting to whether these modern market channels can play a role in offering sustainable food to consumers in Bangkok. It is also interesting to study the strategies that food courts and restaurants can use to make sustainable food more visible to the consumers to convince the consumers to make greener choice in their everyday eating practice.

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