

Final article:

Hingley, M.K., Lindgreen, A., and Beverland, M.B. (2010), “Barriers to network innovation in U.K. ethnic fresh produce supply”, *Entrepreneurship and Regional Development*, Vol. 22, No. 1, pp. 77-96. (ISSN 0898-5626)

For full article, please contact [LindgreenA@cardiff.ac.uk](mailto:LindgreenA@cardiff.ac.uk)

## RESEARCH ARTICLE

### Barriers to Network Innovation in U.K. Ethnic Fresh Produce Supply

Martin K. Hingley,<sup>a</sup> Adam Lindgreen,<sup>b\*</sup> and Michael B. Beverland<sup>c</sup>

<sup>a</sup> *Department of Business Management and Marketing, Harper Adams University College, Newport, Shropshire, the U.K.*

<sup>b</sup> *Department of Marketing and Business Strategy, Hull University Business School, Hull, the U.K.*

<sup>c</sup> *Department of Marketing, School of Economics, Finance, and Marketing, RMIT University, Melbourne, Australia*

#### Abstract

This article investigates whether sectoral entrepreneurship by ethnic minorities is held back by network disconnection. Popular interest in localized production and consumption often gets offered up as an antidote to rapidly globalizing markets. However, fractures between local production and consumption prevent such markets from developing. This study investigates supply chains and networks that attempt to meet market demand for “specialist” fresh produce, targeted at and run by ethnic minority-controlled foodservice businesses in the U.K. The focus for attention is the West Midlands region. This region has a strong and entrepreneurial ethnic minority, predominant foodservice and wholesale sector and a strong agricultural/horticultural tradition, but the two are disconnected. Key findings indicate that latent demand exists for locally sourced specialist fresh produce to meet the needs of a growing ethnic minority population, but network integration is a barrier. Disconnection concerns the following: (a) there are predominant issues of price sensitivity, which dictate channel sourcing and market development, (b) foodservice businesses rely on the access, market information, and availability provided by gatekeeper wholesale traders who are bound to overseas agencies and their produce and display an ingrained resistance to local and regional supply, and (c) cultural disconnections separate rural (predominantly “white”) growers and (predominantly Asian) wholesale intermediaries and retail/ foodservice businesses.

This article identifies that ethnic entrepreneurship in specific sectors (such as specialist fresh produce) can be strong, but that there still are barriers to successful whole industry, regional, and network development. Poor motivation of both network 'gatekeeper' wholesalers and (and network collaboration) of growers is preventing ethnic entrepreneurs at the foodservice and retail level from benefitting from wider regional network source innovation.. Recommendations are made for production, technical, and marketing support at the grower and intermediary level; and all stakeholders need educational and market support in the development of truly integrated food networks.

**Keywords:** ethnic minorities, network innovation, fresh produce, U.K.

\* Correspondence details: Professor Adam Lindgreen, Hull University Business School, Cottingham Road, Hull HU6 7RX, U.K. E-mail: a.lindgreen@hull.ac.uk. Telephone: + 44 1482 463 096.

## **Barriers to Network Innovation in U.K. Ethnic Fresh Produce Supply**

### **1. Introduction**

Due to migration, an estimated 125 million people live outside their country of origin, often creating large, diverse, ethnic minorities that continue to grow and expand relative to their host countries (European Communities, 2002; Wellner, 2003). The U.K. population in 2001, for example, numbered 1.8 million Indians and Pakistanis and 1.0 million Black Africans and Black Caribbeans; in total, the Black and ethnic minority (BEM) numbered 4.6 million, or 7.9% of the total population. With the fall of Communism and the accession of former Eastern Bloc countries into the European Union, the U.K. experienced additional ethnic diversification, including the addition of approximately 1.0 million Poles (Commission for Racial Equality, 1999; Marketing, 2007; Office for National Statistics, 2002).

Some ethnic minorities tend to live isolated from the rest of the population, keeping their customs and traditions, whereas others assimilate, abandoning their customs and traditions (Askegaard, Kjeldgaard, and Arnould, 1999; Yinger, 1994). Interactions among different ethnic minorities may prompt them to adopt customs and traditions normally associated with other groups (Jamal, 1998; Jonsson, Hallberg, and Gustafsson, 2002; Lu and Fine, 1995). These traditions often include unique eating habits (Chung and Fischer, 1999; Dalrymple, Robertson, and Yoshino, 1971; De Mooij and Hofstede, 2002). For example, the South Asian diet is rich in vegetables, Black African diets include many fruits and vegetables, and the Eastern European diet contains a high ratio of starch and meat (Shaw, 2008). Many religions, including Hinduism, Islam, and Judaism, also feature dietary stipulations (Keynote, 2001).

The influx of immigrants from ethnic, racial, and religious minority groups and their unique consumption habits creates both opportunities and challenges for small and medium-sized enterprises in terms of their entrepreneurial strategy, innovation, and marketing. Moreover, “Ethnic food is one of the fastest growing sectors in the food market” (Keynote, 2001), and the purchasing power of minority groups can be considerable. For example, U.K. Muslims spend in excess of £2 billion a year on food (Lyons, 2007). Businesses therefore need to adopt a position that enables them to profit from this expanding marketplace.

A special issue of *Entrepreneurship and Regional Development* (2003) attempted to address the topic of ethnic minority enterprise in particular, noting that immigrant racial minorities

appear overrepresented in small firms and independent self-employment in Anglo-Saxon economies such as Canada, the United Kingdom, and the United States, as well as in some mainland European nations such as France and the Netherlands (Ram, 2003). Entrepreneurial literature often considers the formation, maintenance, and sustenance of ethnic minority businesses, with an emphasis on ethnic resources and disadvantages (Phizacklea, 1990; Werbner, 1990), yet a more recent view posits that the interplay among factors, including the sector, locality, labor markets, and institutional context (Kloosterman, van der Leun, and Rath, 1999), as well as the political and regulatory environment (Collins, 2003; Kloosterman, 2003; Kontos, 2003; Leung, 2003; Ram and Smallbone, 2003), determines particular forms of ethnic minority enterprises. Studies also show that local and national governments can support the recovery and progress of deprived areas, but ethnic minority, small business-led recovery has particular significance (Patel and Gujral, 2008a, b).

Many such independently owned U.K. grocery shops specialize in local dietary preferences. Asian and Afro-Caribbean food products often are imported through small wholesalers in the Manchester area and delivered to communities in Birmingham and Leeds; and for Polish food products, the supply chains generally are less organized, consisting typically of single entity (i.e., a person with a car) who supplies neighborhood stores with food products (Shaw, 2008). Because their customers often earn lower incomes and lack access to automobile transportation (O'Neill, 2005; Shaw, 2006, 2008), ethnic minority food retailers (with a few notable exceptions) tend to locate in local neighborhoods, in small storefronts, without the financial resources to provide shoppers with significant information about products.

In this context, various schemes have attempted to improve the diet of ethnic minorities, including efforts to encourage vegetables grown locally. For example, industrial wastelands in Birmingham, Bradford, and Sheffield and underused communal gardens in London have been converted into productive vegetable plots, run by immigrants (Haeg, 2008). However, little research attention considers possible connections between these burgeoning food markets and the specific market demand created by fundamental shifts in the U.K. ethnic mix, as well as with food producing areas of the country. Imports continue to meet market demand too readily, even though a greater understanding of new markets and market reconnection could be both possible and desirable for all channel members. The overall objective of this article is to identify the principal issues of disconnection in local and regional fresh food sector networks that may lead to restriction of choice (at the retail and

foodservice level) and market access (for regional primary producers) and what may be done to achieve reconnection.

We structure the remainder of this article as follows: First, we provide a literature review that serves as a comparison for our study. Second, we describe the methodology and, third, present and discuss the findings of our empirical research. Fourth and finally, we identify our study's contributions and managerial implications, as well as some limitations, and suggest avenues for further research.

## **2. Literature review**

Migration continues to affect the United Kingdom, resulting in an increasingly diverse ethnic population (Marketing, 2007; Office for National Statistics, 2002) and creating an opportunity to market to ethnic minorities by stocking international foods, amongst other. The U.K. West Midlands region, after London, contains the largest BEM population, namely, according to the 2001 Census, 11.3% of the regional population. Indians (Asians or British Asians) constitute the largest group, representing 3.4% of the region's population. More than half the region's ethnic minority population is Asian of Indian (30.1%), Pakistani (26.1%), Bangladeshi (5.3%), or other Asian (3.5%) origin; a further 17.5% are Black, the majority of whom are of Black Caribbean origin (13.9%).

### ***2.1. Foreign foods and their increasing popularity***

Increasing globalization also has increased the amount of foreign foods available in the United Kingdom and greatly influenced cooking techniques and ingredients. Major supermarkets stock a great variety of ethnic vegetable produce, and consumers attempt to replicate restaurant eating experiences through ready meals as well as efforts to cook dishes from scratch, which requires specific fresh ingredients (Jamal, 1996). Accessibility to fresh produce thus offers a key factor in market growth (Intel, 2005a), and the distribution of fresh produce, especially that suitable for ethnic consumers, must address the location of various ethnic minorities.

The West Midlands region's ethnically diverse population could be significant for sustainable local and regional food chains. We focus particularly on fresh produce (e.g., vegetables, fruits, salads, herbs), which has the most universal appeal across mainstream and ethnic minority markets. The U.K. retail market for fruit and vegetables was valued at £8.13 billion

in 2006, with a growth rate in the range of 2.4–5.5% per annum since 2001, slightly above the inflation rate and generally more successful than the markets for most other agricultural commodities (Mintel, 2007). The predicted market value for 2011 is £9.6 billion (Mintel, 2007), which suggests product differentiation can add significant value to this market. For example, differentiating foods as ethnic or local might benefit producers that hope to market their produce and earn premium prices.

## ***2.2. High-value fresh produce***

Building value in the fresh produce sector can be difficult; price remains the main differentiator for most consumers, and the essential nature of many products means that some fruit and vegetables have been vulnerable to keen price competition from grocery multiples (Mintel, 2007). Thus, both prices and margins decline. Exceptions include the buoyant demand for more specialist fresh produce categories (e.g., pumpkin, squash, asparagus, sweet corn, herbs), which earn higher sales as they become more widely available and consumers gain more understanding of their use. Furthermore, increasing ethnic diversity and the popularity of ethnic dishes, which often demand specific herbs, has enhanced the market for fresh produce; for example, sales of fresh herbs more than doubled between 2000 and 2005 and now account for approximately one-fifth of sales of all herbs (Mintel, 2005b). Coriander, an herb used widely in ethnic cooking, has become the biggest seller (Anon, 2005a). Herbs generally are not sold as branded products but are available through supermarkets in portion-controlled packs, bunches, or pots. Greengrocers and independent retailers, particularly ethnic stores, usually offer bunched herbs and sell much greater volumes than do supermarkets.

### ***2.2.1. Multiple retailers***

As is true of the food market overall, multiple, or chain store, retailers enjoy the biggest market shares for fresh fruit and vegetables, encompassing 84% of all U.K. retail sales in this market (Mintel, 2007). These grocers supply more than four-fifths of the produce market, so their growth strategies inevitably have significant impacts on the fruit and vegetable sector, such as the influence of everyday low pricing strategies on prices. Such strategies enable supermarkets to offer value for money compared with their smaller competitors.

### ***2.2.2. Greengrocers and specialists***

Greengrocers and specialists have lost market share as more consumers engage in one-stop shopping at supermarkets; some specialist outlets even have left the market (Mintel, 2005a).

However, the remaining businesses appear to run efficient operations to highlight their unique selling points: they offer a higher standard of service and more product expertise. These potential outlets for local and regional produce could be market routes for some growers.

### *2.2.3. Convenience stores and independent retailers*

Convenience stores and independent retailers have increased their market shares for both vegetables and fruit; in the past, their reputations suggested they sold lower quality produce than supermarkets and offered poor freshness because of their slower stock turnover (Mintel, 2005a). However, an increasing number of wholesaler groups and convenience operators are challenging this reputation directly and working to increase their share of the fresh produce market (Mintel, 2005a). Many convenience stores, especially chain stores, now offer fresh fruit and vegetables (Institute of Grocery Distribution, 2005a) with higher standards and in more comprehensive ranges. It also appears that many ethnic minority consumers regularly shop at smaller stores near their homes, especially those that specialize in ethnic foods and ingredients for native cuisines (Hingley, 2006).

## **2.3. Local and regional food**

Representing 6% of all food and drinks sales in the United Kingdom, regional and local niche products are becoming more widely available, especially as multiple retailers commit to local and regional sourcing (Institute of Grocery Distribution, 2005b). Similarly, consumers recognize the origins and traceability of foods and often attempt to buy more local and regional produce. In the competitive food and grocery industry, successful products must differentiate themselves from competitors and ensure their benefits are relevant to target markets. Consumers require local or regional products to meet their high standards, especially related to freshness and quality, as well as sustainability with regard to supporting smaller local and regional producers and a positive overall shopping experience (Institute of Grocery Distribution, 2005b). Local and regional foods can develop unique selling propositions based on taste, freshness, social commitment, variety, convenience, seasonality, special methods of production, and heritage.

### *2.3.1. Growers*

Vegetable and fruit growers might increase market shares by offering a wider range of produce, including exotic or ethnic foods, which could encourage consumers to think beyond

their existing image of traditional local farm produce and include a wider range of fresh produce categories, which ultimately would enhance the overall image of the sector (Hingley, 2006).

### *2.3.2. Convenience stores*

Convenience stores similarly are well placed to benefit from this marketing opportunity, because they should have a good knowledge of the local market, such as the products currently available, local producers and suppliers, and the demands of local shoppers (Institute of Grocery Distribution, 2005a). Such market knowledge is particularly relevant for exotic or ethnic produce demanded by concentrations of people from various ethnic minorities in particular neighborhoods.

### *2.3.3. Specialist channels (farmers' markets, farm shops)*

Specialist channels are susceptible to barriers of awareness, availability, and access (Institute of Grocery Distribution, 2005b), in that consumers often remain unaware that local and regional foods exist and fail to recognize their access to places that sell these foods at accessible prices (Institute of Grocery Distribution, 2005b). Other consumers may lack the time to visit specialist farmers' markets and farm shops or consider the local and regional foods too expensive; they also may not be able to rely on the consistent availability of local and regional foods. In this sense, fresh produce has become a destination category; it is one of the few product categories for which consumers will switch stores (Fearne and Hughes, 1999). It is also one of two categories (the other being meat) that virtually all supermarkets provide under their own brands. Thus, supermarkets guarantee continuity of supply to attract customers, avoiding seasonality issues by importing produce from abroad. In turn, U.K. consumers have become accustomed to being able to buy everything they way, all year round (Tesco, 2006).

### *2.3.4. Foodservice (restaurant and catering) sector*

Few farmers or regional food producers specifically target the foodservice sector; most do not target their products in any particular direction at all (Institute of Grocery Distribution, 2005c). The foodservice market is complex and operates in various ways. Furthermore, the key requisite for foodservice firms is guaranteed availability of supply, which smaller producers rarely can promise without collaborating with others to meet larger supply requirements (Institute of Grocery Distribution, 2005c). Foodservice businesses often feel



secondary, behind retailers, in importance, which does not encourage great customer loyalty. However, unlike the well-established routes of access to retailers, foodservice offers a variety of supply chains, including selling directly to the caterer or through wholesalers and distributors (Hingley, 2006).

The sheer size, diversity, and range of potential foodservice customers looking for fresh produce, in summary, represents both a significant deterrent and a major benefit (Anon, 2005b), which leaves growers unsure about where to start. Some ignore the potential benefits of this massive sector, which leaves them reliant on supermarket contracts and the volatilities of that market. Despite concerns about distribution and unique markets, caterers often prefer long-term contracts with suppliers and develop closer relationships with them, which could help suppliers feel more secure. Growers should identify potential customers in this sector and their critical requirements, then differentiate their products accordingly.

### **3. Research context and methodology**

#### ***3.1. Research context***

Birmingham, the United Kingdom's second largest city, hosts one of the leading fresh food wholesaling markets that, geographically, is well located for producers in the West Midlands area. According to recent research, 65–75% of the trade at the horticulture wholesale market involves Asian business customers, most of whom come from within two or three miles of the city center, which suggests that accessibility is a particular issue for these businesses and may be a problem in view of the possible relocation of the Birmingham Wholesale Market when the leases expire in 2009 (Anon, 2005c). In this case, local and regional producers might gain an opportunity to deal directly with ethnic businesses through delivery services. Growers that currently use the wholesale route to sell their produce might benefit from this change if they were to focus on quality as a means to meet the requirements of ethnic food retailers and restaurants in the region.

#### ***3.2. Research methodology***

This study combines several research methods, including nonprobability sampling, qualitative methods, face-to-face interviews, and focus group interviews. The qualitative methods are appropriate for our study of complex phenomena, for which we take into account many variables (Eisenhardt, 1989; Lindgreen, 2008; Yin, 1994). We follow Yin's (1994)

principles to conduct the face-to-face interviews and focus groups. Secondary data and follow-up focus group discussions indicate some rich insights and support the generalizability of the findings to other contextual settings (Beverland and Lindgreen, 2008; Eisenhardt, 1989). Furthermore, by including a variety of stakeholders with different points of view, we enhance the overall validity of the findings. By combining these findings with business-specific data and information gained from marketing and other functional managers, we develop a framework with which to assess perceptions of the key decision makers involved.

### ***3.3. Data collection and analysis***

By using multiple data collection methods, we enhance the robustness of the findings, compensate for any weaknesses of a specific data collection method, improve the final interpretation, and help ensure triangulation (Jick, 1979; Strauss and Corbin, 1998; Yin, 1994). The units of analysis are the businesses and their principal decision makers. This study assesses three distinct members of the supply chain: the fresh produce growers, the wholesale trader intermediaries, and a sample of typical (small-scale) retail and foodservice customers. Each of the three surveys mentioned in the following is available from us upon request.

#### ***3.3.1. Fresh produce growers***

For the grower study, we sent postal surveys to a sample of fresh produce growers obtained from existing data sources, such as the membership listing of the Assured Produce Group, the leading quality assurance mark for fresh produce in the UK. All 375 members of this group in the West Midlands received a survey. We also sent surveys to the 35 members of Greengrocer Ltd. in Warwickshire and Worcestershire with fresh produce production interests and the 50 members of the West Midlands Fresh Produce Group. The former is a local food chain initiative designed to link production, value additions, and the consumption of local food; the latter is a grower discussion forum. Some overlap is possible among these groups, but we attempt to avoid cross-mailing. The mailed packages also included letters from the appropriate membership groups.

The survey's 26 questions covered issues in relation to production (e.g., which types of produce are produced and which types are the preferred ones) and market routes (e.g., the principal and the preferred routes, and reasons why). Also, growers answered questions relating to produce they currently were considering growing; and they provided information on how, if at all, they market produce to ethnic minorities. As well, growers detailed what is

important when growing and supplying fresh produce; and what is important in local and regional fresh produce competing with imported fresh produce. In the final part of the survey growers elaborated on their links or collaborations with other parties in the industry (growers, wholesale trader intermediaries, retail and foodservice customers).

The data analysis uses SNAP software. Of the 460 surveys we mailed, we received 64 completed and useable returns, for a response rate of 14%. All these respondents received invitations to join the follow-up focus group and strategy meetings, so we could gain more detailed responses to the market opportunities posed by emerging ethnic markets for specialist crops in the region. These meetings were chaired by the National Farmers Union and attended by representatives from regional government, the regional funding bodies and ethnic business fora based in the West Midlands. Typically, eight to ten growers attended each of the three meetings; more growers also attended the two regional dissemination meetings.

### *3.3.2. Wholesale trader intermediaries*

A market for specialist fresh produce requires routes to market, which demands a good understanding of the role of intermediary (wholesale networks) and the link between primary producers and end customers. We conducted face-to-face interviews with appropriate wholesale channel intermediaries based at the Birmingham Wholesale Market, whom we chose on the basis of their specialist knowledge. The interviewees have close working relationships with many local businesses that represent potential purchasers of local specialist fresh produce.

We consulted the Refresh Partnership's (2005) directory to develop our sample and found 40 horticultural traders in the Birmingham Wholesale Market, though 11 sell produce outside the scope of the investigation, such as fish or flowers. Therefore, the available population consists of 29 wholesalers. We contacted the Birmingham Wholesale Market Traders Association prior to the interviews to request permission and ask advice about the best time of day to visit. Through ongoing efforts, we conducted semi-structured interviews with 20 wholesalers.

The survey's 17 questions related to wholesale trader intermediaries' relationships with growers and customers (i.e., retail and foodservice customers). Regarding growers, wholesale

trader intermediaries explained how they found these growers, whether they are supplied from more than one grower, how often they review and change their growers, and what they consider important in their relationships with growers. Regarding retail and foodservice customers, wholesale trader intermediaries described who their main customers are and whether local or regional produce is important to these customers. In the final part of the survey, wholesale trader intermediaries compared local and regional produce to produce that comes from outside the United Kingdom; also, they identified what would make local and regional produce more attractive to them and, ultimately, their customers.

Although we used SNAP software to design the questionnaire for the growers, this approach is more effective for quantitative studies. For the wholesalers, we wrote the questionnaire and dictated the results in Word format, which enables our in-depth analysis and reflects the qualitative nature of these personal, face-to-face interviews.

### *3.3.3. Retail and foodservice customers*

Finally, we devised a postal study of a sample of West Midlands retailer and foodservice businesses, obtained from three sources: the Birmingham Chamber of Commerce, Business Links, and the Asian Business Forum. Although we mailed 500 surveys, the response rate was very poor, so the resulting data are insufficient for use. The poor response likely reflects some language barriers; English is not always the first language of traders. Instead, we conducted 20 face-to-face interviews with a qualitative sample of representative stakeholders, including retail and caterer customers of Birmingham Wholesale Market and several restaurants in Birmingham.

In the interviews, retail and caterer customers were asked to identify from where they currently source their fresh produce; also, they identified the main source and the preferred source for fresh produce (and reasons why). Another part of the interviews concerned whether retail and caterer customers were considering buying specialist fresh produce, whether they believed there are gaps in the market for additional specialist fresh produce. The final part of the interviews requested retail and caterer customers to consider whether they would be willing to buy locally or regionally sourced fresh produce and what would be reasons for doing this.

## **4. Findings**

#### ***4.1. Grower sample***

Of the 64 returned and completed surveys, 55 (86%) represent the Assured Produce Group member list. Furthermore, the response was particularly strong from traditional fresh produce growing counties, such as Herefordshire, Worcestershire, and Shropshire. For the respondents, potatoes were the most significant crop, but they grow a wide range of other fresh produce crops, reflecting the diverse nature of regional fresh produce production (e.g., salads, legumes) and specialist crops (e.g., pumpkins, herbs, sweet corn).

The respondents identify the large, consolidated routes offered by wholesalers, distributors, prepackers, and processors as their most important outlets. Few growers sell directly to the supermarket sector. Other outlets include direct supply to independent fresh produce retailers, caterers, retail markets, and the public; they have lesser importance but still appear useful.

Growers express a fragmented view of the future marketing of fresh produce. Their predominant routes to market dictate their thinking, though growing opinion posits that selling direct to the public, caterers, retail markets, and independent retailers may become preferred choices. As the first choice, wholesalers, processors, and prepackers provide cost efficiency, volume, timeliness, consistent sales, and simple trades. Supplying large prepackers provides an economical and straightforward route to the supermarket sector, the most significant outlet for fresh produce; moreover, it enables growers to gain access to regular, high-volume business at consistent, fixed prices. These outlets also are consistent and secure payers. Some respondents cite the contractual and integrated nature of the cooperative supply channel that links the grower, prepacker, and retailer, though the powerful prepacker—retailer axis retains channel control over both product and pricing decisions.

Wholesalers and distributors provide an easy route to sell high-volume produce and surplus regularly, as well as poorer quality produce in some cases, because they are not as exacting as prepackers and supermarkets. They too offer regular payment but create issues of price instability. Of the remaining principal preferred routes to market, catering appears attractive for the same reasons as wholesaling; it is simple and straightforward.

Nearly 60% of growers state that their preferred future business would move through the major outlets of prepackers, wholesalers, processors, and caterers; the remainder spread

across a range of direct-to-market routes. Growers appear keen to develop alternatives to the main consolidated outlets, though they currently account for far lower volume sales. These diverse and direct outlets would enable growers to retain price and cost controls and thus take a larger share of the channel margin. Selling direct to the public or independent retailers, retail markets, and other farm shops likely will grow in importance.

Few growers currently grow crops specifically targeted at the Asian consumer market, but they identify a few specialist crops they have or might consider growing, such as okra, garlic, mustard leaves, coriander, mint, and pumpkins. Growers also suggest crop production alternatives in the hope of finding new import substitution production opportunities. However, the significant uncertainty surrounding this point indicates that growers need further guidance. Uncertainty was the most common response. Moreover, many growers indicate that market gaps would be efficiently and cheaply filled by imports. For West Midlands growers, the most important issue pertains to market knowledge, including how the production of specialist crops might fit in the seasonal cycle. Growers wanted access to customers and relevant data sources; a few respondents noted the dearth of information sources and that growers rely on retailer sources. Not surprisingly, other important issues for growers include production (agronomic and technical advice), product quality (e.g., how to grow high-quality specialist crops), price (economic pricing supports to ensure returns), and supply continuity (grower collaboration and networks). Finally, they note the need for specialist machinery to produce and harvest new types of crops.

In the focus groups with the growers, which took place after we received the responses to the survey, we attempted to bring together representative growers to discuss the implications of the preliminary results. Growers clearly understand the market opportunities offered by ethnic markets, but the focus groups confirm their generally negative view toward pursuing such markets. This negativity derived from several key points. First, the depressed state of the U.K. agriculture industry did not engender confidence to try new things. Most fresh produce growers are general arable crop producers, suffering from very depressed producer prices, which made them unwilling to risk diversification into crops that might require new agronomic techniques, new equipment, or additional labor. That is, the larger conditions made growers extremely risk averse. Second, growers worried about the channel power of retailer and wholesaler customers and questioned the level of customer interest in and loyalty toward buying local and regional produce, especially when customers have easy access to

cheap overseas produce. In particular, they regarded specialist crops targeted at ethnic markets as oversupplied, which could depress producer prices. Third, the cultural issues highlighted disconnections in the supply chain; the predominantly white, rural growers did not understand urban BEM business customers, including the largely Asian wholesale traders or end consumers. The channels were fragmented by both language and culture.

#### ***4.2. Wholesaler sample***

Most (58%) of the produce sold at the Birmingham Wholesale Market goes directly to foodservice firms, especially small, family-run businesses. Very little produce goes to distributors or grocery wholesalers; they buy direct from growers and use the wholesale market only if they have a shortfall of a particular product. Wholesale traders tend to be most concerned about export sourcing, which consistently averages 60–100% of their business. The fresh produce market, especially for specialist and exotic fresh produce, is growing, and according to the wholesalers, the majority of their produce comes from abroad. The majority of wholesale traders in Birmingham are British Asians of Indian or Pakistani descent and are positioned at the hub of dealings with often very local customers of the same background in retailing and food service and (primarily) internationally sourced fresh produce.

All the wholesalers in our study sell some U.K. produce, though not the specialist produce on which we focus. Rather, wholesalers find it easier to get produce from abroad, because U.K. growers cannot supply the quantity in continuous supplies. The local produce they sell does not include exotic or specialist produce categories, though most wholesalers sell no produce grown in the West Midlands region, despite their location, because they perceive it as uneconomical and not viable and question the ability of producers to “sell themselves.” Instead, they develop long-term relationships with foreign suppliers, including family connections (typically in India or Pakistan) or subsidiary relationships with international trading companies. During the (short) U.K. peak season, wholesalers might buy U.K. potatoes, apples, and soft fruits, because it is economical to do so.

Although wholesalers indicate relatively positive attitudes toward West Midlands fresh produce, they remained unconvinced of the benefits. They simply were not interested enough to seek local produce, because they prefer simple business transactions, and local growers do not offer them, according to their past experiences. Moreover, the wholesalers prefer the appearance and taste of imported products, though none of them mentioned freshness. Their

overall feeling was that local food was no more profitable to sell than imported produce; if anything, local produce was more expensive for the company when they considered overhead. Seasonality issues also were critical; by sourcing abroad, they could guarantee year-round supply, and changing suppliers according to season would be complicated. They express no desire to start dealing with many different growers. Thus, the responses demonstrate that even if wholesalers are interested in new suppliers, they prefer to stay with the same ones for simplicity; if they contact a new supplier, it is to gain up-to-date market information that they can use to renegotiate prices with existing suppliers. Wholesalers also prefer fewer deliveries and use middlemen only for produce that is difficult to source or new products. By dealing directly with few suppliers, they can achieve optimum profit margins. Most of these suppliers already deliver direct to the wholesale market, so offering delivery is not a unique selling proposition; they also have distribution vehicles and networks, so if necessary, they can collect produce from suppliers and then charge for this service. For a wholesaler to change suppliers, it must be forced to do so out of necessity, such as when an existing supplier goes out of business.

Nearly all wholesalers believe that local sourcing is not important to their customers; their customers neither ask about nor care where the produce comes from, as long as it is of adequate quality and a reasonable price. Local produce appears somewhat more important for shops, but only 26% of customers are small shop owners. One-quarter of wholesalers stated that they did not think their customers knew much about local produce, which may suggest an education opportunity.

The wholesalers thus seemed uninterested in the idea of changing suppliers and were quick to point out past problems with local suppliers. Their answers were either negative or absent; not one offered a positive assessment of local produce. This situation generally damns the possibilities of supply chain reconnection, but external factors may be responsible for such negativity. In particular, wholesale traders are concerned that the Birmingham Wholesale Market will cease to exist after the lease expires.

#### ***4.3. Retailer/foodservice responses***

Retailers and caterers mostly obtain fresh produce by visiting wholesale markets, though they also receive deliveries from wholesalers. In a less frequent method, they collect fresh produce from wholesale grocery cash-and-carry outlets, which offer cheap, competitive prices and a



wider range of products. Other respondents from this group source fresh produce directly from farms, and one restaurateur grew his own garden herbs. Local allotments sometimes provide specialty crops, including coriander and fenugreek, and the allotment schemes, pioneered by local authorities in the West Midlands, suggest important sources for the future.

When asked to identify their preferred supply routes for fresh produce in the future, these respondents mostly indicated they would continue to collect from wholesale markets; however, they anticipated wholesale delivery would become less important, replaced by direct delivery from farms. All other potential options remained of minor interest. The wholesale market offers a classic one-stop opportunity in a competitive environment; wholesale delivery offers similar benefits but creates some questions about quality. Busy independent traders also perceive delivery as an attractive alternative to visiting the wholesale market, though they cannot compare prices in this case. Sourcing products direct from farms may offer fresh and good quality produce and value for money, but few respondents cited it; only one respondent indicated that direct farm sourcing supported farmers and that farmers offered better rates and quality.

These trade customers identified several specialty crops they already bought, mostly from wholesalers that relied on imported sources. They also suggested additions (e.g., Mouli), and one respondent cited fresh herbs as difficult to find. However, most gaps in this market pertained to tropical produce (plantain, yams, lemongrass) or crops requiring protection (Aubergine). For example, the Pakistani red carrot is similar in appearance to common carrot varieties except for its deeper red or purple color; it is a relative newcomer, introduced in the last two years, that illustrates the strength of family and trading ties between the U.K. Pakistani community and Pakistan. This sweeter variety is popular among ethnic minorities, but the wholesale price is double that of domestically grown varieties, which could provide a market gap for a home-grown variant.

No consensus exists regarding the quality of local versus imported produce, nor do the respondents agree about the price competitiveness of local produce compared with imported produce. On the issue of seasonality and continuity, despite a lack of conclusive consensus, the respondents indicated strong agreement that they must switch to imports in winter.

Retailers and foodservice operators expressed interest in buying local or regional fresh produce in the future, citing freshness and support of local supply networks as reasons. However, they also voiced typical concerns related to seasonality and availability. The decision to use local or regional produce currently and in the future thus depends on the two predominant issues, namely, quality and price, but also on influential factors such as availability, reliability, and sourcing and delivery issues.

Time resources also are significant for these family-run, independent retailers and caterers; they would like to receive produce deliveries but believe they “would still have to go to wholesale market to buy fruit.” Overall, they consider the wholesale markets a cheaper option that offers good quality.

## **5. Discussion**

The steady growth in the fresh produce market differentiates it from most declining food commodities. Chain supermarkets dominate this market, accounting for more than four-fifths of sales and most of the branding of fresh produce under their own labels. However, the supermarket chains do not necessarily meet the needs of ethnic minority communities and this market sector is often served well by entrepreneurial ethnic food businesses. Mintel (2007) identifies some interest in local produce among consumers but also notes also that price remains the primary determinant of purchase, and supermarket competitive pressures force down both prices and margins. Local sourcing may be an issue of growing importance in the supermarket sector though, which has captured some governmental attention, as well as some consumer interest. However, at the gatekeeper wholesale level, interest is not as apparent; small store and foodservice customers of the Birmingham Wholesale Market, for example, are much more concerned with value than with origin.

As sales of staples such as potatoes decline, some key growth areas emerge for fresh produce. Opportunities in specialist sectors result from increased demand among growing BEM populations, as well as greater mainstream interest in foreign and specialty cuisine. However, the considerable opportunities for specialist fresh produce may be hampered by supply channel disconnection and the strength of the existing importer and wholesale channel.

Supermarkets continue to dominate the fresh produce market, and greengrocers and specialist stores have declined, though they remain an important local outlet for growers. The

convenience store revival, following years of decline, may open the door to specialist and niche retail opportunities. Fresh produce, as a cornerstone category, may help build this revival, and its growth prospects remain strong, though the market requires differentiation to continue to build value.

Consumption trends suggest some evidence of higher value (convenience-driven) produce and continuing positive market growth, though Mintel (2005a) notes that the West Midlands has the lowest consumption of fresh produce in the United Kingdom. Great interest focuses on consumer purchases of local and regional fresh produce but, as always, at a price and with barriers in the form of awareness, access, and availability.

Consumer awareness is low; little promotional activity reaches end (especially urban) customers. Wholesalers rely on promotional materials from their overseas agencies. Thus, the access and availability of local produce depends on the strength of the intermediary wholesale channel, which displays no loyalty to local sourcing.

However, growers can capitalize on some new opportunities and thus overcome access barriers by developing new and specialist crops and outlets. Foodservice and catering outlets remain an underdeveloped market for fresh produce, and convenience stores offer a natural and growing outlet (particularly among BEMs). This study identifies several opportunities in outlets that currently prioritize foodservice customers over retail ones, but overriding concerns about the continuity of supply continue. Furthermore, our grower survey reveals no significant interest in the needs of foodservice customers, which may represent a missed opportunity, in the form of either partnerships with wholesale markets or direct sales to foodservice outlets.

Continuity is the primary problem hindering local and regional markets for fresh produce. Wholesalers deal with overseas suppliers of fresh produce because the prices are good, the continuity is guaranteed, and the relationship is easy. Growers take a similar approach and choose the easy option, namely, to off-load their surplus produce onto wholesalers and processors whenever possible, rather than cultivate value-adding, specialist, or continuous high-quality relationships. Market customers (both foodservice and retail) also are motivated by the ease, value for money, and one-stop sourcing of personal visits to wholesale markets. Deliveries provide a secondary option.

The fresh produce industry is thus a two-tier system; the best products go to supermarkets, whereas the poorer quality or production overruns are sold through wholesalers. Caterers provide an outlet for both tiers, whereas the processing industry is an important market for lower-grade products and bulk sales. The growers we interviewed confirmed this pattern, though they also expressed interest in the opportunities offered by diverse, alternative, and local markets, which could provide higher value returns through lower operating costs and decrease their reliance on lower margin, bulk sales. However, the logistically straightforward, regular, high volume, consistent business remains difficult for growers to ignore. Like wholesalers, they will take the easiest, highest turnover business route. Yet growers in mature static markets, such as potatoes, would benefit from seeking alternatives, for which they would not have to sacrifice their control over prices or agendas.

Growers also appeared interested in the idea of supplying to caterers, but they may not be in a position to do so. Foodservice provides a volume outlet for growers, rather than a potential partnership dedicated to added value and diverse produce. Growers are much more enthusiastic about direct marketing opportunities, which promise lower overhead costs and higher returns. Furthermore, some growers relish the human contact element of short supply chains or selling directly off their farms.

Ethnic produce offers considerable untapped potential for growers. A West Midlands-based (Shropshire county) grower, JK Fresh Produce, has made considerable inroads into the specialist produce market by producing and marketing coriander, spinach, fenugreek, and kale. The company was established by an Asian grower, who now farms 1,200 acres. Asian entrepreneurs might offer a distinct advantage to some customers; just as wholesalers develop overseas ethnicity affinities, U.K. supply channels involving, for example, Asian growers in direct supply to caterers or retailers could offer a similar advantage. Thus, the cultural disconnection problem might find a solution in the context of this particular grower who bridges the Asian, culturally bound predominance of the fresh produce wholesale markets. The grower offers wholesale access to other local growers of other specialist crops destined for Asian end users by acting as a packing and marketing hub. Thus, JK Fresh Produce represents a market channel innovator and a language and cultural bridge.

According to the few new crops suggested by growers, market opportunities appear difficult for growers to identify. They might wish to attempt to grow new and specialist crops, but they appear to be seeking direction and guidance about crop types, production, product quality, technical advice, and market knowledge. In particular, they seek access to good customer database information and support in targeting new customer outlets. Some growers would welcome network collaborative (though not necessarily formal producer cooperative) arrangements or support from governmental and nongovernmental agencies. Grower network links appear poorly developed, such that beyond the producer and marketing groups, the growers cite few other formal or even informal channel or network ties. Contacts are the lifeblood of the industry, but those among growers seem largely *ad hoc*. Growers therefore are seeking a more structured approach to market database and network development. A part solution to these issues was identified in the focus group and strategy element of the study. The senior executives of JK Fresh (identified above) took part in this phase of the study, and a result of the process was that JK offered to expand its role as consolidation outlet for a greater number of regional growers of specialist ethnic produce and further their role as intermediary hub and ‘cultural’ bridge with the urban wholesalers.

Price controls have profound effects, so growers are looking for support from both new markets and external agencies. Common overall themes from the grower survey include the desire to develop new market channels and the awareness of latent customer demand for direct marketing. However, in line with previous studies, the growers note their concerns about the cost and risk of new business developments and would prefer support from appropriate agencies to ease this diversification process.

Growers also appear unsure about consumer demand for local produce. Some hold out hope that future demand might emerge. Of course, the growers proclaimed their confidence in the quality of local and regional produce; the survey of wholesalers however contradicts these claims. Growers similarly consider their prices competitive with imports, but the wholesaler survey indicates instead that U.K. suppliers could be unrealistic in their price expectations, which matches the Mintel (2007) report that price remains a significant factor in the success of this market. Although growers acknowledge the barrier of seasonality, the issue was much more significant for wholesalers. The retailers and caterers appear unconvinced that local and regional produce offers poorer quality or less value, but again, they cite seasonality as a major concern.

Supermarkets currently are working closely with key suppliers to extend the U.K. season for many crops, and some consumer interest is emerging for U.K.-grown products, but these efforts are hampered by the general lack of understanding of seasonal cycles. By preference and through their established links, wholesalers deal with overseas sources, motivated primarily by the ease, volume of business, and (perhaps subsidized) market support from larger-scale overseas agencies offer. Wholesalers do not actively court supply but wait for it to come to them or perpetuate successful contacts and family or home country ties. They buy U.K.-sourced fresh produce only during the season and express no particular interest in it. These negative views of local, regional, and U.K. produce may be, however, knee-jerk reactions. Alternative supply routes would upset the easy operations of most wholesalers, who demand year-round reliability and consistency, quality, volume sales, and competitive pricing, which makes it easy to dismiss U.K. produce. This study brings into sharper focus the barrier of wholesaler sensitivities toward continuity and price, as well as their connections to overseas export agencies. Although the grower study suggests greater interest in pursuing local and specialist markets, it also notes growers' nervousness about the potential for low returns and high investment costs.

## **6. Conclusions**

Like most of the U.K. food industry, the fresh produce sector is dominated by supermarkets, interested in niche markets for locally sourced and specialty produce but without a stranglehold on these areas of opportunity. Therefore, an opening exists to develop provisions for specialist and convenience store retailing and foodservice. In untapped business areas, chain traders do not yet dominate. For example, the growing BEM community in the West Midlands is less reliant on the supermarket sector, supporting thriving communities of retailing and foodservice infrastructures that offer a ready market for local and specialist fresh produce, though it currently relies (partly by choice) on wholesale markets.

Our study identifies strong demand for specialist fresh produce, including herbs and exotic vegetables (e.g., sweet Pakistani carrot, pak choi cabbage, okra, pumpkins, squashes) that can be grown locally. The challenge, however, is the overriding significance of price and value in the fresh produce market, a consequence of widespread market dominance by supermarkets, which has a significant influence on the wholesale, foodservice, small-scale, and grower

sectors of the market. Thus, product and sourcing diversification and value-adding initiatives become even more challenging for all parties—but also more necessary.

Wholesalers represent the gatekeepers for the fresh produce industry. Their desire for “an easy life” obtained from connections to imported produce suppliers is understandable, but their lack of understanding and flexibility in their attitudes toward home-grown production and producers represents a major barrier to for local and specialist fresh produce.

Growers could develop specialty produce despite their concerns about the production and marketing cost implications; they should encourage a market that does not depend solely on the supermarket sector or high-volume, low-value sales through wholesalers. Farmers’ markets and direct sales offer a promising option, but opportunities also exist in the direct delivery of specialty produce in urban areas and BEM communities. Awareness and access are still barriers to grower integrated network relationships at the wholesale level and with urban retailers and foodservice outlets. Despite their motivation, growers also require production, technical, and marketing support to develop local produce markets, especially access to customer and market data. Fresh produce markets and channel sectors are bound by tight, specific collaborative and network arrangements, such that access to such networks could encourage the development of the market.

The perceptions of growers, trade intermediaries, and retailer and foodservice outlets differ with regard to issues of quality, value, and continuity of supply when comparing U.K. (local supply) with overseas produce. Some issues result from misconceptions, whereas others are genuine concerns. Furthermore, the grower culture contains strong facets of quality and environmental assurance, yet these factors appear less important to intermediary and retail buyers, who are more concerned with the fundamentals of immediate quality and value.

### **6.1. Recommendations**

Even amidst the enthusiasm for market making and market satisfaction, it is too easy to ignore issues of market power and the role of channel leaders or gatekeepers, despite prior research that confirms their significance and impact (Hingley, 2005; Hingley, Lindgreen, and Casswell, 2006). These considerations often conspire to confound new market channels or simply maintain the *status quo*. To confront channel power and network coordination issues, fresh produce growers would benefit from horizontal channel collaboration and supply chain

and marketing hubs like that exemplified in the JK Fresh case. In addition, a proactive network approach to ongoing interactions with other channel members and their representatives could be pursued. Network opportunities are available for niche specialist produce through customer relationships that offer delivery directly or through wholesalers. With a collaborative approach, growers could actively court interactions with wholesalers, retailers, and foodservice customers. Yet growers, wholesalers, and retailers and caterers also need to undertake considerable education to overcome the supply issues and preconceptions. Growers also require support in their production, marketing, and network and database maintenance.

Existing research on ethnic entrepreneurship has perhaps pursued a too narrow view of creativity and marketing making at a sector level; this study shows that business activity can be restricted by market channel blocks, which prevent wider connection with ethnic and mainstream business networks. From the focus group activity for this study it is clear that there are many fora at a regional political level, industry and sector level, and through ethnic business support agencies, which may bring together the network parties. These may prove a catalyst for network understanding and may lead to reconnection and improved service, product choice, and support for ethnic controlled foodservice and retailing businesses. This approach follows a view set in Patel and Gujral (2008a) where local government support was targeted at ethnic entrepreneurs in retail businesses. If this could be successfully targeted by wider stakeholders to represent all parts of the network then perhaps a more encompassing and inclusive critical mass could be achieved. It is clear that ethnic entrepreneurship can thrive in areas such as retailing and foodservice, but without true network connection such operators are often limited in what they can offer by the activities (or inactivity) of channel intermediaries or gatekeepers. Local primary product entrepreneurs can also be disconnected.

The lessons from this study are for encouragement (through stakeholder engagement) by lead parties (regional funding bodies and representatives of interested sector parties) to form closer network integration and for educational engagement to overcome barriers of, for example, product misconception, culture, and language, which lead to restrictions on product and service offer to end business users and consumers.

## ***6.2. Limitations and further research***

Even though markets may show great potential, as our study shows, they often can be held back by channel and network disconnection. Further research should investigate potential



measures to bring stakeholders together and ways to ensure ongoing flows of knowledge, information, and ideas. Such research might expand to include consumer studies (especially of ethnic minority users) and revisit the end-user retailer and foodservice samples to obtain further validation through a larger-scale study. The limited access in our study, due to language and cultural barriers, might be overcome through focus group and depth interviews. Such methods might be more effective if researchers gain the cooperation of community leaders and trade associations.

## **7. Notes on contributors**

Dr. Martin K. Hingley is Reader in Marketing, based at Harper Adams University College in Shropshire, the leading university in the U.K. specializing in agri-business. He has published in *British Food Journal*, *Industrial Marketing Management*, and *Journal of Marketing Management*, among others. His primary research interests focus on marketing and the applied areas of food industry marketing and supply chain relationship management. He has presented and published widely in these areas and serves on the editorial boards of several journals.

Dr. Adam Lindgreen is Professor of Strategic Marketing at Hull University Business School. He has published in *Business Horizons*, *Industrial Marketing Management*, *Journal of Advertising*, *Journal of Business Ethics*, *Journal of Business and Industrial Marketing*, *Journal of Marketing Management*, *Journal of Product and Innovation Management*, *Journal of the Academy of Marketing Science*, and *Psychology & Marketing*, among others. His most recent book is *Managing Market Relationships*. His research interests include business and industrial marketing, consumer behavior, experiential marketing, relationship and value management, and corporate social responsibility. He serves on the board of many journals.

Dr. Michael B. Beverland is Professor of Marketing at RMIT University. Michael has published case research in *Design Management Review*, *Industrial Marketing Management*, *Journal of Advertising*, *Journal of Business Research*, *Journal of Management Studies*, *Journal of Personal Selling and Sales Management*, and *Journal of Product Innovation Management*, among others. His research interests include customer-desired value change, branding, and brand evolution. He serves on several journal boards.

## **8. References**

- Anon. 2005a Boom time for the herb, *Fresh Produce Journal*, April 1: 12-14.
- Anon. 2005b Relocation, relocation, relocation, *Fresh Produce Journal*, July 29: 18-26.
- Anon. 2005c Are they being served? *Grower*, June 2: 14-17.
- Askegaard, S., Kjeldgaard, D., and Arnould, E.J. 1999 Identity and acculturation: The case of food consumption by Greenlanders in Denmark, *MAPP Working Papers*, 67, MAPP Center, Aarhus University, Aarhus.
- Beverland, M.B. and Lindgreen, A. 2008 Addressing research quality in qualitative case studies: trends in *Industrial Marketing Management*, 1971-2006, in press.
- Chung, E. and Fischer, E. 1999 It's who you know: intercultural differences in ethnic product consumption, *Journal of Consumer Marketing*, 16 (5): 482-501.
- Collins, J. 2003 Cultural diversity and entrepreneurship: policy responses to immigrant entrepreneurs in Australia, *Entrepreneurship and Regional Development*, 15 (2): 137-149.
- Commission for Racial Equality 1999 *CRE Factsheets* (London: Equality and Human Rights Commission).
- Dalrymple, D.J., Robertson, T.S., and Yoshino, M.Y. 1971 Consumption behavior across ethnic categories, *California Management Review*, 14 (1): 65-70.
- De Mooij, M. and Hofstede, G. 2002 Convergence and divergence in consumer behavior: implications for international retailing, *Journal of Retailing*, 78 (1): 61-69.
- Eisenhardt, K.M. 1989 Building theories from case study research, *Academy of Management Review*, 14 (4): 532-550.
- European Communities 2002 *European Social Statistics: Migration* (Luxembourg: Office for Official Publications of the European Communities).
- Fearne, A. and Hughes, D. 1999 Success factors in the fresh produce supply chain: insights from the industry, *Supply Chain Management*, 4 (3): 120-128.
- Haeg, F. 2008 *Edible Estates: Attack on the Front Lawn* (Los Angeles, CA: Metropolis Books).
- Hingley, M.K. 2005 Power to all our friends? Learning to live with imbalance in UK supplier-retailer relationships, *Industrial Marketing Management*, 34 (8): 848-858.
- Hingley, M.K. 2006 *New Opportunities in the Fresh Produce Market: Feasibility Study Phase 2*. (Newport: Harper Adams University College).
- Hingley, M.K., Lindgreen, A., and Casswell, B. 2006 Supplier-retailer relationships in the U.K. fresh produce supply chain, *Journal of International Food Products and Agribusiness Marketing*, 18 (1/2): 49-86.
- Institute of Grocery Distribution (IGD) 2005a *Convenience Retailing* (Watford: IGD).

- Institute of Grocery Distribution (IGD) 2005b *The Local and Regional Food Opportunity* (Watford: IGD).
- Institute of Grocery Distribution (IGD) 2005c *Understanding the Foodservice Opportunity for Farmers and Small Food Producers* (Watford: IGD).
- Jamal, A. 1996 Acculturation: the symbolism of ethnic eating among contemporary British consumers, *British Food Journal*, 98 (10): 12-26.
- Jamal, A. 1998 Food consumption among ethnic minorities: the case of British Pakistanis in Bradford, U.K., *British Food Journal*, 100 (5): 221-227.
- Jick, T.D. 1979 Mixing qualitative and quantitative methods: triangulation in action, *Administrative Science Quarterly*, 24 (4), 602-611.
- Jonsson, I.M., Hallberg, L.R.M., and Gustafsson, I.B. 2002 Cultural foodways in Sweden: repeated focus group interviews with Somalian women, *International Journal of Consumer Studies*, 26 (4): 328-339.
- Keynote. 2001 *Ethnic Foods* (Hampton: Keynote Publications).
- Kloosterman, R. 2003 Creating opportunities: policies aimed at increasing openings for immigrant entrepreneurs in the Netherlands, *Entrepreneurship and Regional Development*, 15 (2): 167-181.
- Kloosterman, R., van der Leun, J., and Rath, J. 1999 Mixed embeddedness: (in)formal economic activities and immigrant businesses in the Netherlands, *International Journal of Urban and Regional Research*, 23 (2): 252-266.
- Kontos, M. 2003 Self-employment policies and migrants' entrepreneurship in Germany, *Entrepreneurship and Regional Development*, 15 (2): 119-135.
- Leung, M.W.H. 2003 Beyond Chinese, beyond food: unpacking the regulated Chinese restaurant business in Germany, *Entrepreneurship and Regional Development*, 15 (2): 103-118.
- Lindgreen, A. 2008 *Managing Market Relationships: Methodological and Empirical Insights* (Aldershot: Gower Publishing).
- Lu, S. and Fine, G.A. 1995 The presentation of ethnic authenticity: Chinese food as a social accomplishment, *Sociological Quarterly*, 36 (3): 535-553.
- Lyons, T. 2007 Pak superstore to tap ethnic food potential, *The Grocer*, May 26: 10.
- Marketing. 2007 Demographics: ethnic Britain, April 18: 31-33.
- Mintel Market Intelligence. 2007. *Fresh Fruit and Vegetables—U.K.* (London: Mintel International Group)

- Mintel Market Intelligence. 2005a *Fresh Fruit and Vegetables—U.K.* (London: Mintel International Group).
- Mintel Market Intelligence. 2005b *Seasonings—U.K.* (London: Mintel International Group).
- Office for National Statistics. 2002 *Social Focus in Brief: Ethnicity 2002.* (London: Office for National Statistics).
- O'Neill, M. 2005 *Putting Food Access on the Radar: How to target and prioritise communities at risk* (London: National Consumer Council).
- Patel, S. and Gujral, K. 2008a Retail-led regeneration: government initiatives to support Asian Food., in Lindgreen, A. and Hingley, M. (eds.), *Opportunities from Ethnic Diversities* (Aldershot: Gower Publishing), in press.
- Patel, S. and Gujral, K. 2008b Asian food and drink: Change, renewal and stability in Handsworth, in Lindgreen, A. and Hingley, M. (eds.), *Opportunities from Ethnic Diversities* (Aldershot: Gower Publishing), in press.
- Phizacklea, A. 1990 *Unpacking the Fashion Industry* (London: Routledge).
- Ram, M. 2003 Editorial: Ethnic minority enterprise: policy in practice, *Entrepreneurship and Regional Development*, 15 (2): 99-102.
- Ram, M. and Smallbone, D. 2003 Policies to support ethnic minority enterprise: the English experience, *Entrepreneurship and Regional Development*, 15 (2): 151-166.
- Refresh Partnership. 2005, *Refresh Directory* (London: Refresh Partnership).
- Shaw, H. 2006 Food Deserts: Towards the development of a classification, *Geografiska Annaler*, 88B: 231-247.
- Shaw, H. 2008 Identifying and overcoming barriers to healthy eating faced by ethnic minorities in the U.K., in Lindgreen, A. and Hingley, M. (eds.), *Opportunities from Ethnic Diversities* (Aldershot: Gower Publishing), in press.
- Strauss, A. and Corbin, J. 1998 *Basics of Qualitative Research*, 2nd ed. (Thousand Oaks, CA: Sage).
- Tesco. 2006 Sourcing locally (online). Tesco. Available from [www.tescocorporate.com/page.aspx?theLang=001lngdef&pointerid=5F3C8F3962834E53B1B9DEF85D4DA6F6](http://www.tescocorporate.com/page.aspx?theLang=001lngdef&pointerid=5F3C8F3962834E53B1B9DEF85D4DA6F6) [accessed on 3 April 3, 2006].
- Wellner, A.S. 2003 The next 25 years, *American Demographics*, 25 (3): 24-27.
- Werbner, P. 1990 Renewing an industrial past: British Pakistani entrepreneurship in Manchester, *Migration*, 8 (1): 17-41.
- Yin, R.K. 1994 *Case Study Research: Design and Methods*, 2nd ed. (Thousand Oaks, CA: Sage).

Yinger, J.M. 1994 *Ethnicity: Source of Strength, Source of Conflict?* (New York: State University of New York Press).