Efficiency of Farmer Organisations in Supplying Supermarkets with Quality Food in Vietnam

Paule Moustier, Phan Thi Giac Tam, Dao The Anh, Vu Trong Binh, Nguyen Thi and Tan Loc
moustier@fpt.vn

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Paule Moustier (1), Phan Thi Giac Tam (2), Dao The Anh (3) Vu Trong Binh (4), Nguyen Thi Tan Loc (5)

(1) CIRAD-Malica, 19 Han Thuyen, Hanoi, Vietnam; (2) Nong Lam University (University of Agriculture and Forestry), Ho Chi Minh City, Vietnam; (3) VAAS-FCRI-CASRAD, Hanoi, Vietnam; 4) IPSARD-RUDEC, Hanoi, Vietnam; (5) VAAS-FAVRI, Hanoi, Vietnam

Abstract

The development of supermarkets in Vietnam, as in other emerging countries, goes along with an increasing concern on the part of purchasers for food quality. The paper investigates whether farmer organisations are able to help small-scale farmers get access to supermarkets, and the role that supermarkets and public support play in their emergence and development. It is based on case studies involving a number of stakeholders marketing vegetables, flavoured rice and litchi fruit in Vietnam. The interviews investigated patterns of horizontal and vertical coordination that link farmers to supermarkets, the distribution of costs and benefits between farmers and traders along the chains in relation to the strategy of quality differentiation. Eight farmer associations that work in the form of private commercial organisations are regular supermarket suppliers for the selected products. Their ability to supply supermarkets is related to the combination of functions they make available to their members, especially as regards training to improve quality (appearance, taste, safety), quality promotion and control, for which they receive public support,

as well as their participation in flexible contracts with supermarkets, shops and schools. Supermarket supply through farmer associations increases farmer incomes when compared with traditional chains, yet the situation is reported to change with the increase in supermarket competition. The paper argues that changes in farmer organisation are not only due to supplying supermarkets, but also to public and international support to food quality improvement, which have been of benefit to supermarkets.

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I INTRODUCTION

The fast development of supermarkets in both developed and developing countries has been covered extensively in reports in the last decade, particularly by Reardon and Berdégué (2002) for Latin America, and by a recent workshop organised by FAO in Malaysia as regards the Asian context (Shepherd, 2004). In Asia, the first supermarkets emerged in the 1990s and it is reported that Malaysia is the most advanced country in terms of supermarket development (Shepherd, 2004). In China supermarket development has been described as soaring with annual growth rates of 40 percent in the number of supermarkets and 80 percent in business turnover (Zhang, Yang and Fu, 2004).

Although not as fast as in other countries of Asia, supermarket development has been going at a steady path in Vietnam. The first supermarkets appeared in Hanoi in 1983 and in 2005, Vietnam had around 126 supermarkets, 55 in Hanoi and 71 in Ho Chi Minh City, including eight hypermarkets. Consumers express a growing concern for food quality— especially safety (Figuié, 2004). This demand has promoted the sale of food products by supermarkets as well as by new retailing enterprises operating at market stalls or shops, for who efforts to improve visual quality (attractive presentation; packaging) and communication on product safety are major promotion tools.

Supermarkets in other countries are reported to bring about a number of changes that are challenging for small-scale farmers to meet. Private standards are developed by supermarkets as substitutes for missing or inadequate public ones. They serve as tools enabling them to compete with the informal sector by claiming superior product attributes (Ménard and

Valceschini, 2005; Reardon and Timmer, 2005). Requirements in terms of quantity and daily delivery, requests for deferred payments and the need to have a bank account are also reported to result in the exclusion of small farmers (Rondot and al, 2005). Finally, oligopsonies may be detrimental in the long run for consumers as well as suppliers as they reduce choices of outlets and leave suppliers with “take-it-or-leave-it” conditions and bring prices down. At the same time, though, some supermarkets are developing efforts in terms of ethical remuneration of farmers (Fox and Vorley, 2004).

The characteristics of small-scale family agriculture with a large diversity of farming systems and practices that results in disparity and a lack of uniformity in agricultural produce complicate matters for supermarkets who have exacting requirements and standards. There is therefore an important need and role for intermediaries such as wholesaler or farmer organisations to connect farmers and supermarkets (Rondot et al, 2005).

Yet the conditions for the emergence, development and sustainability of farmer organisations supplying supermarkets are rarely documented, including the respective role of supermarkets, local administrations and farmer initiative. The purpose of this paper is to investigate whether farmer associations have indeed developed as a result of supermarket development in Vietnam and have proven successful in facilitating small-scale farmer access to more profitable market opportunities. It is based on the case studies of four food chains supplying Vietnamese cities: vegetables to Hanoi from Soc Son and Moc Chau, vegetables to Ho Chi Minh City from peri-urban areas and from Duc Trong and Don Duong districts in Lam Dong Province, litchi from Yen The district in Bac Giang and Hai Duong provinces in the North and flavoured rice from Nam Dinh (Hai Hau district) in the North. These commodities have been chosen because they involve small-scale farmers (less than 0.5 hectare) and supply supermarkets. In each chain, an in-depth analysis has been made of the patterns of horizontal and vertical coordination linking farmers to supermarkets through interviews of farmers and traders, heads of associations and community leaders (see Table 1), highlighting the emergence and role of farmer associations, the conditions of member inclusion and exclusion, the relationships between farmers and their purchasers in terms of market and technical information exchange, credit, inputs, quality control, training, pricing strategies and bargaining power. Information regarding costs and benefits was also gathered along marketing chains.

Table 1-Sample for interviews of farmers and traders for the trader interviews

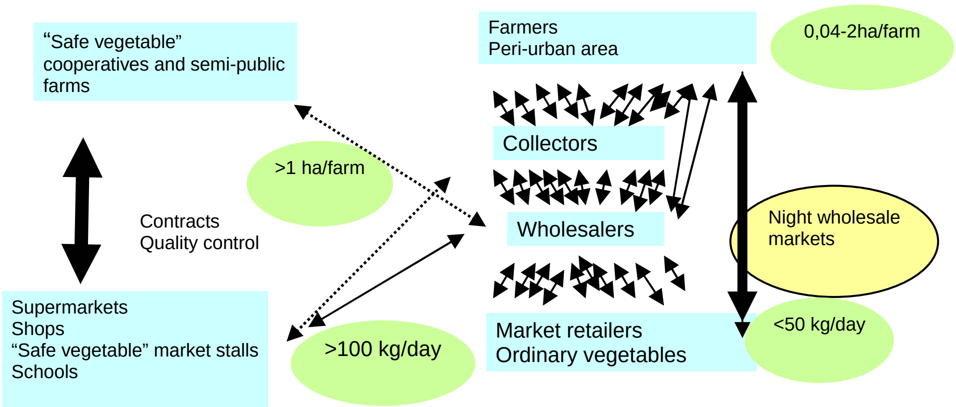
Sample	**Commodities**			
	Litchi, North	Vegetables, North	Vegetables, South	Rice, Hai Hau
Supermarket managers or purchasers	13	13	2	19
Wholesalers	3	4	4	6 Hanoi wholesalers 3 food companies 20 Hai Hau wholesalers
Market retailers	6	8		10
Shop vendors	6	11		10
Street vendors	6	12		10
Collectors	3	5	4	13
Farmers	80 (randomly chosen from list given by local authorities)	32=16/village of Moc Chau randomly chosen from list given by collectors	120 farmers in Don Duong and Duc Trong districts (Lam Dong Province) 2 heads of farmer organisations in Cu Chi district, 3 heads of farmer organisations in Lam Dong Province 2 farmers in Cu Chi district.	44 farmers in 2 communes (Hai Phong, Hai Toan)

II MAIN RESULTS

A) The importance of farmer associations in supplying supermarkets

When tracking the origin of food products retailed by supermarkets in Hanoi and Ho Chi Minh City and comparing it to the situation in traditional retail markets, the importance of farmer associations appears conspicuously, while collectors or wholesalers operating in night wholesale markets, who are key actors in traditional retail markets, play a much more limited role. This is all the more so where food commodities are sold fresh and/or are specific in terms of quality characteristics. As regards vegetables, Hanoi supermarkets receive most of their supplies from five cooperatives located in Van Noi and Duyen Ha communes, involving less than 450 farms and 50 hectares, as well as from the Technical Fruit and Vegetable Centre, a mixed public-private establishment, covering around 3 hectares, all of which are located in the peri-urban zone of Hanoi (see Figure 1). In Ho Chi Minh City, supermarkets are supplied by five to ten farmer cooperatives in the Dalat area for temperate vegetables, either directly or through a dedicated consolidator. Leafy vegetables are supplied by two groups in Cu Chi district (one association, one cooperative), or by Vegfruco, a State-owned company. Litchi chains have a similar organisation. While traditional market retailers are supplied by wholesalers in night wholesale markets, supermarkets selling litchi get their supplies from the Thanh Ha Litchi Farmers' Association which has a membership of 138 households—and also from some individual farmers acting as collectors in the same area.

Figure 1-Organisation of Vegetable Supply Chains in Hanoi and Ho Chi Minh City



The case of flavoured rice is slightly different. Supermarkets are mostly supplied by private companies (called food companies, formerly State farms), which buy from a network of wholesalers supplied by collectors. The same wholesalers and collectors operate in the traditional chain supplying market and shop retailers. But since 2003, an association of 437 members supplies rice to supermarkets through two dedicated food companies. This accounts for 89 tons out of a total of 543 tons traded by supermarkets (and 5,560 tons retailed in Hanoi). Through the trading companies, this association supplies 16 supermarkets (30 percent of Hanoi supermarkets) and 20 shops in 7 of the 9 Hanoi districts.

We will now give more details on the farmer organisations supplying supermarkets.

B) Characteristics of farmer organisations supplying supermarkets

An important distinction in Vietnam relates to the difference between “formal” farmer organisations, that is traditional farmer cooperatives and voluntary organisations in which farmers choose to perform some joint social or economic activities. Before 1986, formal (sometimes called “old”) cooperatives played a crucial role in access to inputs, as well as the marketing of food commodities to State enterprises in charge of food retail distribution and the supply of rice at subsidized prices. Now these cooperatives perform mainly an administrative and political role, in other words act as an interface between farmers and the government and are also strategic as regards the management of irrigation and drainage infrastructures, but are no longer involved in economic activities. Voluntary farmer organisations in the form of commercial joint-stock cooperatives were legalized in 1996. The new cooperative law of 2003 makes the voluntary cooperative the basis to get an economic status, negotiate contracts, and pay taxes – while associations still lack a clear legal economic status (with the advantage of tax exemption), so that it is the household members who have the right to make contracts rather than the group. All of the farmer organisations supplying supermarkets surveyed herein are of a voluntary economic nature, some in the form of cooperatives, others in the form of associations.

The functions of the farmer organisations surveyed are summarised in Table 2. Farmer organisations are vehicles of government support, in particular in the area of quality development at the production, packaging and processing stages; in addition, they are involved in joint negotiation with purchasers and quality labelling, which enables all parties to enjoy a good reputation for quality.

Table 2-Main characteristics of farmer organisations supplying supermarkets

Location	Peri-urban Ho Chi Minh City		Lam Dong province			Peri-urban Hanoi	Nam Dinh province	Hai Duong Province
Products	Vegetables						Flavoured rice	Litchi
Name	Ap Dinh Association	Tan Phu Trung Co-op	Xuan Huong Co-op	Phuoc Thanh Co-op	Anh Dao Co-op	Van Noi Mr M's Co-op	Hai Hau Association	Thanh Ha Association
Date esta-blished	2001					1996	2003	2003
Number of members	200	50	21	15	11	16	437	138
Area (ha)	20	7	0.5	1	0.5	7	54	
Output (t)	630		100	250	720	900	180 t	500 t
Conditions for membership	A wide range of incomes, production volumes and size; no membership fee		Close relationship, experience and ability to invest in greenhouses Membership fee: 60 USD	Close relationship, experience, Membership fee: 200 USD	Membership fee: 60 USD	Neighbour and kinship relationship Shares = 60 USD	Belonging to the same limited geographical area	Neighbour relationship
	Agree to comply with common association production protocols and labelling							
Main functions	Training on safe vegetable production						Training on quality rice production, labelling and packaging	Training on quality litchi production, labelling and packing
			Credit in cash				Credit in input	
	Input supply			Input supply			Input supply	
	Marketing: joint branding and contact with purchasers, joint transport and delivery							
							Processing and packing	
	Organisation of external vegetable safety inspections and internal safety control						Commitments to follow production protocols	

The centralisation of marketing decisions varies from one co-op to another. The usual situation is that the co-op employs a salaried worker in charge of marketing and then pays the farmer the resale price minus a fee for some administrative costs and transportation. In the safe vegetable co-ops in Hanoi such as Mr M's Co-op in Van Noi, marketing operations are decentralised: each member deals directly with a point of sale (supermarket, shop or school) for product delivery and payment. The co-op management board made up of four salaried members establishes contacts with customers, allocates customers to each member and influences crop planning. It also negotiates the annual contracts with the purchasers.

All reviewed organisations have a contract with supermarkets (or in the case of Hai Hau, with companies supplying supermarkets). These contracts are written for 80 percent of supermarkets. They specify the frequency of delivery of vegetables, quality requirements and conditions of payment (cash, 15 to 30 days after delivery). As regards vegetables, in Northern Vietnam, quality requirements are limited to providing a certificate of safe vegetable production issued by the Department of Science and Technology on the basis of farm inspections. These certificates are no longer current (have not been updated in the last seven years!) but are an indication of past training and efforts in terms of quality put forth by the buyers, and they have been progressively put back since 2005 by the Department of Plant Protection. In Ho Chi Minh City, the certificate is granted by the Department of Agriculture and Rural Development on the basis of two farm inspections per month and collection of samples for analysis of chemical residues and pathogens. Supermarkets rely on certification by the Department of Agriculture and do complementary ad hoc inspections. In Ho Chi Minh City, contracts specify visual quality characteristics such as vegetables must be Grade 1 in reference to colour and softness (for leafy vegetables) or size and uniformity (for tomatoes).

The Hai Hau Rice Association and the trading companies have signed an exclusive three-year contract based on the sale of 100 tons of perfumed rice per year (83 percent of the production in 2004) and specifying the price, packaging style, certificate delivered by the Ministry of Health, monthly payment, replacement conditions in case of damage or expiry date. The Thanh Ha Litchi Association has a contract with two supermarkets and a wholesaler supplying supermarkets, agreeing on a minimum quantity supplied during the one-month litchi season, various quality characteristics in terms of packaging, labelling, product uniformity and possible return of unsold products.

Selling commodities to retailers with strategies of quality promotion generates additional income for farmers, especially those organised into associations (Moustier and al, 2006). In

Ho Chi Minh City, profits per kilo for farmers are higher in supermarket-driven chains than in traditional chains, especially as regards ordinary tomatoes supplied from Anh Dao Co-op in the Dalat area to CoopMart (890 VND/kilo compared to 176 VND/kilo). In the rice chains, selling to supermarkets through the association generates the highest profit per kilo of flavoured rice (5,442 VND/kilo compared with 3,167 VND/kilo in the supermarket chain with no association, and 3,140 VND/kilo in the chain supplying traditional retailers). Litchi farmers involved in the association chain from Thanh Ha and selling to supermarkets earned 3,545 VND/kilo in 2004, compared with 2,567 VND/kilo for Thanh Ha farmers outside the association, 2,151 VND/kilo for Luc Ngan litchi sold in shops and 1,766 VND/kilo for Yen The litchi sold by street vendors.

An indication of the dynamism of farmers' organisations is the list of projects they have for the future to develop their business (see Table 3).

Table 3-Prospects of the farmer organisations surveyed

Ap Dinh	- Set up a direct retail outlet in HCMC - Expand production to other kinds of fragrant herbs - Change the association into a joint-stock company
An Phu Trung	- Invest in a refrigerated warehouse and trucks with 70-percent funding support from the Department of Agriculture - Widen its operations to dairy farming with 50-percent investment from the HCMC DARD and the Institute of Post-harvesting Technology.
Anh Dao	- Look for a retail outlet in the Dalat market, Tam Binh wholesale market, other supermarkets such as the Binh Duong Mark and vegetable export companies - Increase production of a wide range of vegetables by renting more land in Lam Dong province in anticipation of supplying 100 percent of total sales from production by its members instead of its current level of 70 percent.
Xuan Huong	- Look for loans to build greenhouses and refrigerated warehouses and thus invest in high-value vegetables
Phuoc Thanh	- Seek new outlets such as the Tam Binh wholesale market and vegetable companies in provinces - Diversify into a wider range of vegetables
Van Noi	- Expand production area from 7 to 10 hectares
Thanh Ha	- Diversify the retail distribution network locally, in Hanoi and in Ho Chi Minh city - Diversify processed products
Hai Hau	- Diversify the retail distribution network in Hanoi - Improve the rice taste by further analysis of the relation between taste and production protocols

III DISCUSSION

Quality promotion is a major function exerted by farmer associations which enables access to supermarkets. Supermarkets state that quality is the priority factor in the choice of suppliers, relating to safety as regards vegetables (no excess of chemical residues) which is a major concern for urban consumers, while quality of rice and litchi refers to a typical taste in relation to a specific location. These dimensions of quality involve problems of uncertainty and risks of opportunistic behaviour by suppliers, to which labelling can provide an answer. It is indeed in the area of quality labelling that grouped suppliers appear as more distinct from the other suppliers, and it is also in this area where supermarkets want to differentiate themselves like in other contexts (Codron, Giraud-Heraud and Soler, 2003). All vegetables sold in supermarkets are sold under the “safe vegetable” label (either on the packages or on a sign referring to the shelves). Collective action plays a crucial role in the promotion of quality first because it facilitates access to the training resources offered by the government’s agricultural services. In 1995, public interest in the safety of vegetable products led the Vietnamese Ministry of Agriculture and Rural development to implement an ambitious programme called “safe vegetables”. The programme educated farmers in the reasonable use of fertiliser and pesticides, as well as the use of water from wells and non-polluted rivers. In Hanoi, a total of 370 training sessions were organised between 1996 and 2001 with 22,000 participants, and 50,000 technical leaflets were distributed. The programme also helped the marketing of “safe vegetables” through various communication strategies including the organisation of safe vegetable fairs every year and the support to farmers and traders to open “safe vegetable” shops or market stalls. In 2001, it covered 30 percent of the vegetable farming area of the municipality of Hanoi. In Ho Chi Minh City, the programme was implemented by the Department of Agriculture in 1997, the first targeted area being Ap Dinh, where households formerly belonging to a co-op in the early 1980s were farming individually. In 1997, five of them formed an association so that they could join the training program. Membership expanded from five members to forty from 1997 to 2000. After the city's vegetable fair in September 2000 in HCMC, the Ap Dinh Association received many orders from vegetable companies, city caterers and shops. To meet such an increase in demand, the association has gradually included more members, up to 200 households divided into 4 smaller groups based on farmer locations in four villages.

In Northern Vietnam, the Hai Hau and Thanh Ha Associations were set up with the help of the Agricultural Science Institute in 2003 to respond to marketing problems encountered by farmers.

All farmer organisations surveyed have a joint sign of quality in the form of a logo along with mention of the name and address of the co-op either on the package or on a sign at the points of sale. This quality signal and the reputation that goes with it are collective goods which imply specific governance structures in terms of inclusion and exclusion mechanisms (Olson, 2000 edition). These are at the core of the creation of farmer organisations in Vietnam. Collective action also plays the classical role of enlarging product catchment or consolidation, a crucial factor in delivery to supermarkets.

The efficiency of collective action in reducing uncertainties as regards quality characteristics results from various mechanisms. The interlinkages between the supply of inputs and training services, quality control and output marketing reduce opportunistic behaviour that would result in a breach of one's commitment such as with regard to production procedures, and may have consequences on other transactions such as input supplies (Bardhan, 1989). Four of the reviewed organisations are characterized by neighbour and kinship relationships between the members, which allows trust to develop and facilitates the control of farmer behaviour, in particular in terms of chemical use. Each organisation has a board of directors, usually those holding the highest number of shares, who exert hierarchical power on the other members.

The historical development of farmer organisations involved in the marketing of quality food products shows that supermarkets are not the primary vectors of change. In fact, they benefit from changes made by the public administration and from the initiatives of some pioneer farmers in response to changes in consumer demand for increased food safety. There are indeed outlets other than supermarkets which may prove to be more accessible and more profitable than supermarkets. We estimated that 3 tons of vegetables per day were traded in Hanoi supermarkets in 2004 compared with 24 tons per day in safe vegetable shops and market stalls, and 350 tons per day in all Hanoi retail places (Son, Binh and Moustier, 2006). This shows that supermarkets still account for a very limited market opportunity for vegetable farmers. A major vegetable cooperative, Van Tri, has stopped supplying supermarkets after three years in order to concentrate on marketing through ten shops or market stalls in 2004 (compared to four in 2002), where co-op members sell directly to consumers. They considered that supermarkets were too demanding in terms of payment times (fifteen days) and returns of unsold products. The innovative pattern now surfacing is that of direct contact with consumers, who ask questions and are given answers concerning the production methods used by the cooperative.

All reviewed organisations have plans for the future, which commonly include the diversification of retail outlets, increasing production in response to diversity requirements and making investments in storage, refrigeration and processing infrastructure to satisfy buyer quality requirements and minimise the risks of loss. In Southern Vietnam investment plans may receive the support of the local administration, which is less commonly observed in Northern Vietnam. It is noteworthy that none of the surveyed organisations are benefiting from any investment made by the supermarkets in terms of training or infrastructure, while patterns of vertical integration and investments in farmers' training to solve problems of asset specificity in quality management have been observed in other contexts, e.g. for Kenya green beans exported to Europe (Gereffi, Humphrey and Sturgeon, 2005), or for Thai and Chinese supermarkets (Reardon and Timmer, 2005).

The need to have access to a wide range of produce in regularly supplied quantities may push the farmer organisations into commercial enterprises buying from many different farmers (as is the case with Ap Dinh Association). This is a threat to the sustainability of farmer organisations.

IV CONCLUSION

Supermarket development has not so far generated major institutional or technical innovations by Vietnamese farmers, but it has rather benefited from innovations brought on by public support and farmer initiatives to meet new consumer demands for food safety and the labelling of food origin. Supermarkets are presently one of various other options, albeit minor, for farmers to market their "quality" product with a price premium. But this type of outlet is growing in size, with growing competitive strategies as regards the range of suppliers. On the one hand, it may result in the further development of innovations in terms of production to sharpen supplier comparative advantages. On the other hand, it may result in less advantageous pricing conditions (a fact already observed in Ho Chi Minh City where one hypermarket has reduced the period of guaranteed prices from seven to three days) and provide further incentives for farmer organisations to sell outside supermarkets, in particular through their own outlets. Supermarkets may also tend to put to the fore their own labelling rather than the labelling of farmer organisations to capture more of the economic rent gained from signalling quality. This is already observed with vegetables being increasingly sold in bulk with supermarkets putting them on the shelves under a general "safe vegetables" sign. Local administrations should play a crucial role in helping farmer organisations to adjust to such trends in terms of supporting investment in infrastructure to promote product quality and access to retail points in the form of market stalls, shops or farmers' markets, which are still not observed in Vietnam, unlike other countries such as Malaysia or India (den Braber, 2006), or in Europe (Kirwan, 2004). It is also important that local administrations be more closely involved in the control of food safety at the production and marketing stages, primarily for public health, but also to strengthen the credibility of farmer organisations.

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