



Analysis of food retail patterns in urban, peri-urban and rural settings: A case study from Lebanon



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ABSTRACT

Existing evidence on food retail expansion in developing countries is largely based on cross-country studies. This may be excellent to provide general pictures but less relevant for development planners to tailor context-specific interventions. We apply a meso-level analysis to address three questions: (i) Are modern food retail formats impeding the expansion of the traditional ones? (ii) What is the pattern of food retail expansion into urban, peri-urban, and rural areas? (iii) What factors influence observed food retail patterns? The study was carried out within the geographic landscape of Lebanon, a commercial link between the Middle East and Europe. Historical analysis shows increased growth both in the modern and traditional food retail sales, with the former modestly outpacing the latter. However, data from the last five years indicate the gap being reduced to 2 percentage points, displaying a clear leveling-off as compared to the preceding decade. Thus, we find insufficient evidence to conclude that modern food retail formats are definitively replacing traditional ones. An extremely high spatial disparity in food retail concentration is observed across governorates and districts, suggesting a need for flexible policies for viable food system development in various contexts. Expansion of modern food retail formats is limited by geography or socioeconomic groups, while traditional formats are equally present in urban, peri-urban and rural settings, including high poverty areas. This suggests a need for recognizing the latter as alternative institutions to address specific needs of consumers, particularly in poorer neighborhoods or rural areas. The findings are relevant for international, regional, and domestic food retailers to understand food retail patterns in Lebanon, for development planners to tailor specific interventions in areas where food establishments are least developed, and for researchers to investigate the impact of such patterns on nutritional transformations among the Lebanese urban, peri-urban and rural populations.

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1. Introduction

The spatial distribution of the food environment (i.e., location of food establishments) has received attention among economic geographers and development planners because of its implications for local food development and public health outcomes (Eckert & Shetty, 2011; Gatrell, Reid, & Ross, 2011; McEntee & Agyeman, 2010). The ‘food environment’ is a broad concept and may include food retail stores, restaurants, and school and worksite food environments (McKinnon, Reedy, Morrissette, Lytle, & Yaroch, 2009). For the purpose of this study, the ‘food environment’ refers to

traditional retail formats, such as independent grocery stores and greengrocers, and modern retail formats, such as supermarkets, supermarkets and discount stores.

Cross-country evidence from developed and developing countries alike seems to suggest that consumer food expenditure patterns have shifted significantly in recent decades, from traditional toward modern food retail formats, the latter being defined as the aggregation of supermarkets, hypermarkets, convenience stores, and discount stores (Euromonitor International, n.d). In most regions of the world, modern food retailing has diffused from upper-income niches to middle-class and poorer consumer markets and from large and intermediate cities to smaller towns (Reardon, Henson, & Berdegué, 2007). This pattern is predicted to create spatial access to food environments, enhance local food system development, and bring dietary changes (Rischke, Kimenju, Klasen, & Qaim, 2015; Timmer, 2009). The term supermarketization is

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sometimes used to describe the reported increase in the number and market share of modern food retail formats (Dries, Reardon, & Swinnen, 2004; Reardon, Barrett, Berdegué, & Swinnen, 2009).

Existing literature generally suggests that the geographic expansion of food retail formats is exogenous, diffusing from developed to developing countries or from larger to smaller cities (Reardon et al., 2007; Reardon, Timmer, & Minten, 2012). Accordingly, past studies have focused on cross-country analysis to determine which supply-side (e.g. liberalized foreign investment and absence of corruption) and demand-side (e.g. GDP per capita and female workforce participation) variables are affecting the food retail transformation in developing countries. Questions remain, however, as to the pattern and extent of food retail spatial concentration within a specific context (Gustafson, Hankins, & Jilcott, 2012); the effect of this pattern on traditional food establishments – whether modern food retail formats would replace or co-exist with the traditional ones (Guarín, 2013; Minten, 2008; Schipmann & Qaim, 2010); the relative nutritional access and status of consumers relying on traditional food retail formats (Moore & Diez Roux, 2006); the extent of food retail penetration (Humphrey, 2007; McEntee & Agyeman, 2010); and continuity and uniqueness in expansion patterns (Reardon et al., 2012). Spatial distribution of food retailing is dynamic (Joseph & Kuby, 2013) and thus additional evidence is needed to guide development planners as they tailor context-specific interventions.

In light of such gaps, this study applies a meso-level analysis to explore food retail spatial patterns and strategies within a specific geographic landscape. This analysis intends to give a better picture of food retail patterns in urban, peri-urban and rural settings by bridging the gap between cross-country and micro-level studies. A meso-level analysis is particularly relevant to explain two important constructs in geographic analysis – ‘food swamps’, areas with excessive access and exposure to unhealthy foods (Bridle-Fitzpatrick, 2015; Fielding & Simon, 2011) and ‘food deserts’, areas lacking spatial and socioeconomic access to food environments (Helbich, Schadenberg, Hagenauer, & Poelman, 2017; McEntee & Agyeman, 2010; Richardson, Boone-Heinonen, Popkin, & Gordon-Larsen, 2012; Widener & Shannon, 2014). Analyzing relationships between individual purchasing and/or dietary patterns and geographic patterns within a food environment is much more complex and context-dependent (Gatrell et al., 2011; Gustafson et al., 2012). Most past studies have been done in the context of developed countries and focused on the association between food environments and health outcomes (Block, Scribner, & DeSalvo, 2004; Helbich et al., 2017; Kwate & Loh, 2016; Moore & Diez Roux, 2006; Raja, Ma, & Yadav, 2008; Richardson et al., 2012). To the best of our knowledge, there are only a few examples concerning the spatial distribution of food retail formats in the Middle Eastern context, namely Rotem-Mindali (2012) and Omer and Goldblatt (2016).

This study focuses on Lebanon, where food remains a major expenditure category for most households (Euromonitor International, 2014), and makes use of data covering five governorates. Geographically positioned at the center of the Eastern Mediterranean, Lebanon is a commercial link between the Middle East and Europe. Lebanon has several bilateral and regional trade agreements with the European Union, including the Euro-Mediterranean partnership.¹ Accordingly, Lebanese trade with the EU has grown steadily over recent years, averaging a 7.6% annual increase since 2006. International and regional food retailers can benefit from this study by gaining a better understanding of food

retailing spatial patterns in Lebanon. The study may potentially contribute to policies guiding food system development and to future research exploring the impact of modern food retailing in shifting consumption patterns among the Lebanese and regional populations.

The objectives of this paper are to analyze national food retail trends and explore the spatial distribution of food retail formats and potential factors explaining observed patterns. The study aims to address the following questions: (i) Are the modern food retail formats impeding the expansion of the traditional ones? (ii) What is the pattern of food retail expansion into urban, peri-urban, and rural areas? (iii) What factors explain the observed food retail patterns? The study uses multiple data sources to answer these questions. Lebanon is an interesting case given its middle-income, developing-country status marked by persistent poverty; its high degree of urbanization; and its location in the Middle East and North Africa (MENA) region – a region which has not received extensive attention with regards to changing food retail patterns.

The remainder of the paper proceeds as follows. The next section presents a literature review. The following sections provide a brief overview of Lebanon's geography, demography, and economy; our methodology; and results. The last section offers the discussion and conclusions.

2. Literature review: definition, diffusion patterns and strategies of food retailing

2.1. Definitions of food retail formats

The academic literature does not provide a clear distinction between the modern and traditional food retail formats, partly because definitions vary across time and context. For example, the Coca-Cola Retailing Research Council Asia (CCRCA) distinguishes the modern versus traditional formats based on three dimensions (CCRCA, 2007) – service (scale and range of products), degree of independence, and ownership structure – and defines the former as “self-service offerings that typically are part of a chain of stores and belong to an organization that has a corporate structure” and the latter as “family-owned, small over-the-counter stores that are independent in nature” (p. 15). Others define food retail formats in terms of “visible” and “hidden” features (Alexander, 2008; Goldman, 2001), with the former focusing on retail offerings – location, product assortment, price, and marketing and promotion characteristics – and the latter on internal aspects including cultural, technological, and organizational characteristics. The supermarket format is the first modern retail format to have entered in the Asian market, followed by convenience stores and hypermarkets (CCRCA, 2007). One of the most widely used definitions of food retail formats is provided by Euromonitor International (n.d.): Modern food retail formats are defined as the aggregation of hypermarkets (e.g. Carrefour and Tesco Extra), supermarkets (e.g. Champion and Tesco), discounters (e.g. Aldi and Lidl), forecourt retailers (e.g. BP Connect and Shell Select), and convenience stores (e.g. 7-Eleven and Spar). Only the non-chained and family- or individually-owned retail stores constitute traditional food retail formats.²

Following the existing literature (Table A.1), the modern food retail formats could thus be distinguished based on five key dimensions: product assortments, technological requirements (e.g. number of cash registers), supply systems (e.g. number of retail outlets), organizational factors (e.g. number of full time

¹ Details are available at <http://ec.europa.eu/trade/policy/countries-and-regions/countries/lebanon/>.

² For extended definitions, readers are referred to <http://www.portal.euromonitor.com.ezproxy.aub.edu.lb/portal/help/definitionstab>.

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