



Review

The second middle: Conducers and the agrifood economy

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ABSTRACT

Academic interest in food has increased over the last decade with heated debates over organic agriculture, local food, and the globalization of the food economy. While much of this research gravitates towards producers and consumers, there is also growing interest in the economic activities that are performed in-between these two ends. In this paper, we will argue that there is a need to develop stronger discussions engaged with the economic middle broadly and a theoretical framework with which to think through middle industries. We offer the word *conducers* to categorize economic actors engaged in these middle industries and develop a theory of conduction that can be used to critically approach their activities and organization. Building an approach around practice, performance and the politics of narration, we further conceptualize the role of *conducers* and conduction, and describe how they contribute to our understanding of rigidity and change in the food industry.

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1. Introduction: the state of the middle

The “disappearing middle” has been a concern for scholars of agriculture since it became a key term in the early 1980s in

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reference to farm size (see [Buttel, 1983](#); [Buttel and LaRamee, 1991](#); [Lyson et al., 2008](#)). Large farms and small farms both are growing in number, with a hollowing out of everything in-between ([Kirschenmann et al., 2008](#)). While mid-sized, independent, family farms may emerge in the picturesque imaginings of rural America, this type of environment is not always supported through policy and practice.

One important factor in this hollowing out is the growing power of the “middle man”—the middle industries between producers and consumers, farms and forks. As that power has grown, farmers' share of the food dollar has steadily dropped. This phenomenon is common to all countries of the developed world, and increasingly the developing world as well. In the United States, our empirical focus, the farmer's share has fallen from 18.4 percent in 1993 to 15.5 percent in 2011, according to one study ([Canning, 2013](#): Table 1), and from 34 percent in 1982 to 19 percent in 2004, according to another study using somewhat different metrics ([Stewart, 2006](#): Table 6). At the large-scale end of the farming continuum, farmers compensate for smaller margins with higher volumes. An alternative that is widely attempted, often successfully, is for farms to go small through direct marketing or shorter value chains, gaining higher margins for lower volumes, and side-stepping the middle industries. Mid-sized farms find themselves increasingly unable to succeed, as they are too large for direct marketing and too small for the low-margin and high volume agriculture that the middle industries require.

In short, there are two middles in agrifood. On the one hand, there is the “disappearing middle” of farms, and on the other hand there is the “growing middle” of firms participating in non-farming aspects of the food industry. This second middle of firms that are not farms has grown both through the increased bite it takes from the food dollar and through the increased number of people who work in it, from truck drivers, to line workers in food processing plants, to the servers and cooking staff in the half of the household food budget that is now spent out on food served out of the home in countries like the United States. The strength of these middle industries stems in part from shrinking the number of firms through whom this capital flows and for whom these food workers work. They typically integrate vertically, and favor larger suppliers of foodstuffs in order to limit transaction costs ([Hobbs, 1996](#); [Frank and Henderson, 1992](#); [Wood, 2013](#)). In this sense, the growing middle of the food value chain is also a “consolidating middle,” (See [Hendrickson and Heffernan, 2007](#); [Hendrickson et al., 2008](#)) and this has only intensified with the expansion of budget mega-marts into the grocery retail sector ([Wood, 2013](#)) enacting their forceful influence over their suppliers (see [Mottner and Smith, 2009](#)).

But to leave our terminology there at “middle industries” would frustrate efforts to understand these widely-lamented dynamics. We sense a partiality on the part of agrifood scholars to defend the disappearing middle of farming, largely through pointing out ways to sidestep the “growing middle”—for example, through advocating CSAs, institutional buying, and locavorism, as a type of middle-man-less, direct form of exchange. We share some of that partiality, and that advocacy. But we worry that, when carried out with single-minded purpose, such a defense of the first farming middle can amount to a dismissal of the second one, rendering it analytically invisible and thereby giving scope for its further growth and consolidation. As well, such a defense valorizes the farm and the fork and the work that goes on at those two social sites, and denigrates the work that goes on in between as, at best, a necessary evil. This can also erase the labour and infrastructure that facilitates alternative forms of food exchange. All the while, much work has focused on agriculture and the middle-industries. Agrifood scholars have generated an invaluable body of work documenting changes in food industries and offering suggestions for

redirecting troubling trajectories. Giving these industries a full-bodied character and positioning them more fully within a popular food industry narrative can aid in these efforts and give greater heed to the work of scholars of the middle.

For the second middle does indeed do work of value, as well as work that controls value. We offer the concept of *conducers* to provide a language for understanding the work that lies between what producers do and what consumers do, and to add cohesion and conceptual weight to the actors involved in what might broadly be considered middle industries. Conducers participate in the food economy through *conduction*: transporting, processing, warehousing, advertising, retailing, cooking, serving, and more. To conduct is to “bring to a place; a particular condition, situation, a conclusion” (Oxford English Dictionary). The conductor brings food to a place (transportation), brings it to a particular condition through processing and cooking (transformation), and brings it to a situation and conclusion through warehousing, advertising, retailing, and serving (translation). Conducers redefine food physically, economically, and culturally, while coordinating consumers and producers. Indeed, the word “conducer” happily reflects this coordination through combining a root word found in consumer with a root word found in producer: *con*-meaning “together” with *duc*-meaning “lead”—or, in combination, to “lead together.”

But while conductors do work of value, worthy of the close attention of agrifood scholars, there is another meaning of the word conductor that is also apt for the argument we make here. Because of their role in the relationship between producers and consumers, the conductor is frequently the *conductor* of the orchestra of actions and actors that constitute the food economy. Conducers have great power accordingly. The shape of that power is not fixed. As [Kirschenmann et al. \(2008\)](#) articulate well in their work on the agriculture of the middle, it is a market *structure* problem, closely linked to the vertical integration of market players. In other words, rather than a problem of too many conductors and too much conduction, it is a problem of too little diversity, too much vertical and horizontal integration ([Heffernan, 1998](#)), and too many relations of dependency ([James et al., 2013](#)). In order to give greater heed to their activities and performative potentials, we would do well to give greater consideration to what values they *add* to food as well as *take* from it — plus how those values are generated, and how we might render those values more visible so that we may engage with them more knowledgeably and assertively.

In doing so, we build on a long history of a critique of the middle industries and its relationship to capitalist economies, and we attempt to add body to its analysis. Challenges to the capitalist penetration of agriculture have been long documented since [Kautsky \[1899\] \(1988\)](#) first considered the “agrarian question”. The climate, geographic bounds of production, labour requirements, long production times, and perishability of products prevent the full market governance of food. This is the foundation of the classic Mann–Dickinson Thesis, where the authors explain the persistence of family farms through the incompatibility between capitalist logics and agricultural production ([Mann and Dickinson, 1978](#), also see [Goodman and Redclift, 1985](#)). It is further elaborated by work on the rationalization of nature in food production ([Goodman and Redclift, 1991](#); [FitzSimmons and Goodman, 2005](#)) mechanization of farming ([Fitzgerald, 2003](#)), and more recently, on the financialization of farmland for large-scale investment ([Fairbairn, 2014](#); [Isakson, 2014](#)).

Conducers can be seen to capitalize on the conflicts between production and markets by developing elaborate storage technologies, processing food into novel new imperishable products, and managing supply and demand problems by moving commodities across vast spaces speedily and arranging them in particular symbolic worlds. These processes take advantage of the market

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