



Transitions on the shopping floor: Investigating the role of Canadian supermarkets in alternative protein consumption

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ABSTRACT

A transition to a more sustainable diet likely requires substituting proteins of animal origin with alternatives like plant-based foods. Yet consumers are not regularly consuming alternative protein products, and one potential explanation is that the dominant food retail infrastructure is not oriented in favour of these foods. This study provides an in-depth exploration of the role of supermarkets in plant-based protein consumption in a Canadian food retail setting. A mixed-methods approach involving seven supermarket audits, 24 consumer interviews, and five key informant interviews was used to explore the in-store context for plant-based protein purchasing as well as the forms of “fits” and “misfits” between the supermarket's strategies for retailing plant-based protein and consumer strategies when shopping for these products. Our findings suggest that supermarkets are simultaneously enabling and limiting consumers when it comes to alternative protein consumption by increasing the availability of plant-based options, but assuming basic strategies when it comes to marketing these products in-store. We propose several tactics that could facilitate greater uptake of these products, including placing plant-based meat and dairy substitutes on the same shelves as other meat and dairy products and the devotion of more resources to product promotions and the innovation of new varieties. In concluding, we contend that efforts to increase society's consumption of alternative protein products would greatly benefit from better understanding the supermarket's role in mediating this transition.

1. Introduction

Studies of human dietary patterns indicate that a worldwide dietary transition has been taking place, in which a key feature of this transition is a shift from traditional, carbohydrate-based diets to one high in animal-based protein, especially meat (Gerbens-Leenes, Nonhebel, & Krol, 2010; Grigg, 1995; Popkin, 2001; Sans & Combris, 2015). The apparent convergence of animal-based protein consumption patterns has caused a disproportionate share of food-related environmental pressure, including unprecedented levels of greenhouse gas emissions and agricultural resource use (D'Silva & Webster, 2010; Pimentel & Pimentel, 2003; Weis, 2013), with implications for climate change (Steinfeld, Gerber, Wassenaar, & De Haan, 2006) and global food security (Godfray et al., 2010). To reduce the impact of human diets, researchers suggest that Western consumers should transition to a diet featuring wider consumption of alternative proteins, including plant-based proteins, insects, and laboratory-grown meat, with the rationale that these foods require on average less energy and other resources to produce (Aiking, Boer, & Vereijken, 2006; Boland et al., 2013; Gerbens-Leenes et al., 2010; Pimentel & Pimentel, 2003; de Boer & Aiking,

2011). The problem, however, is that while a subset of Western consumers are actively looking for ways to limit their animal-based protein consumption, the majority are not regularly consuming these alternatives (Hartmann & Siegrist, 2017; Lea, Crawford, & Worsely, 2006; Vanhonacker, Van Loo, Gellynck, & Verbeke, 2013; de Bakker & Dagevos, 2012; de Boer, Schösler, & Aiking, 2014).

In this context, an emerging body of literature has explored a number of “consumer-oriented” pathways to increase Western society's consumption of alternative proteins (Schösler, de Boer, & Boersema, 2012). Some of the proposed strategies include targeted information campaigns about the environmental and nutritional benefits of alternative proteins to persuade consumers about more sustainable options (Beverland, 2014; Vanhonacker et al., 2013), product-level changes to improve the sensory attributes of novel protein sources (Caparros Megido et al., 2016; Elzerman, Hoek, van Boekel, & Luning, 2011; Hartmann, Shi, Giusto, & Siegrist, 2015; Hoek et al., 2013, 2011; Ruby, Rozin, & Chan, 2015; Schösler, Boer, & Boersema, 2012), and situating an alternative protein transition within the cultural dictates of “Meatless Mondays” and other lifestyle campaigns away from meat consumption (Schösler et al., 2012; de Boer et al., 2014). While these

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studies expose a variety of practical and socio-cultural factors that underpin protein choices, such as conventions around meal formats and the perceived nutritional superiority of animal-based proteins, an underexplored area is how one's material environment influences the consumption of alternative proteins. The material environment refers to the physical layout of outlets supplying alternative proteins and the product assortment on offer. For instance, Shelomi (2015) hypothesizes that poor availability of insect proteins in commercial retail outlets makes it inconvenient and disadvantageous to consume these products. When questioning the role of citizens in substituting meat with alternatives, de Bakker and Dagevos (2012) hypothesize that the material environment is not oriented in favour of alternatives, and that “the unprecedented abundance of meat in supermarkets ... makes it hard if not impossible for sustainable alternatives to compete with” (p. 890).

The importance of the material environment in shaping alternative protein consumption is especially pertinent in a Western context given the emergence of corporate-controlled supermarkets that dominate the food landscape (Fuchs, Kalfagianni, & Arentsen, 2007; Konefal, Mascarenhas, & Hatanaka, 2005). Large national and transnational retailers, with access to multinational product sourcing, labour allocation, and marketing strategies, have been able to outcompete smaller retailers in terms of supply chain performance and product prices, resulting in a retail oligopoly for food (Fuchs et al., 2007; Gereffi, 1994; Konefal et al., 2005). Public health researchers have articulated the capacity for supermarkets, by virtue of their size and power, to shape what foods people consume by controlling what products they carry, how products are organized, and how products are marketed in-store (Caspi, Sorensen, Subramanian, & Kawachi, 2012; Glanz, Sallis, Saelens, & Frank, 2005; Kelly, Flood, & Yeatman, 2011; McKinnon, Reedy, Morrisette, Lytle, & Yaroch, 2009). Even so-called “sustainable” food products like “organic” and “free-range,” traditionally the domain of farmers markets and specialty stores (Renting, Marsden, & Banks, 2003), have gradually been incorporated into the mainstream food retail model (Burch & Lawrence, 2005; Lyons, 2007), contributing to their mainstream success (Richter et al., 2000). These studies position supermarkets as an important component of the material environment that may be shaping the accessibility of alternatives.

Inspired by the structural importance of supermarkets in impacting food choices, this study seeks to better understand alternative protein consumption in a modern Canadian food retail context. In what follows, we establish our theoretical approach, which involves considering the relative importance of both consumers and supermarkets in shaping alternative protein consumption, followed by a detailed description of our study.

1.1. Conceptual framework

To what extent can the claim be made that supermarkets are dictating what people consume for protein? On one hand, consumer attitudes and dispositions around protein choices are undoubtedly critical to understanding consumption rates (Elzerman et al., 2011; Hoek et al., 2011; Hoek, Luning, Stafleu, & de Graaf, 2004; Lea, Crawford, & Worsley, 2006; Schösler et al., 2012; de Boer et al., 2014). On the other hand, the structural power of supermarkets in food provisioning cannot be exaggerated in terms of its potential to influence the consumption of certain foods (Fuchs et al., 2007; Lyons, 2007; Richter et al., 2000). This tension harkens back to longstanding debates around the relative importance of social actors and social structures in consumption research (e.g., Spaargaren, 2003; Warde, 2005). As Spaargaren (2003) notes, the majority of consumption research focuses on the individual as the locus of food choice, assuming that people have relatively stable attitudes and preferences that can be used to predict future consumption. This epistemological position can be critiqued by those highlighting how attitudes alone are poor predictors of actual consumption behaviour (House, 2016; Padel & Foster, 2005; Vermeir & Verbeke, 2006), as well as those who emphasize the importance of social

practices in directing mundane consumption (Delormier, Frohlich, & Potvin, 2009; Halkier & Jensen, 2011; Spaargaren, 2003; Warde, 2005). In the social practices model, consumption is located within sets of routine practices, such as shopping, that are actively shaped by individuals in their wider social context, including their cultural and physical environment (Warde, 2005). This perspective does not negate the importance of individual actors, but rather highlights the socially-embedded nature of much food-related behaviour (House, 2016). Stemming from this “contextual” approach to food consumption, we rely on a theoretical orientation that considers both individual consumers and retailers as at least partially relevant when it comes to alternative protein consumption.

To organize our analysis we rely on the term “strategies” (Oosterveer, Guivant, & Spaargaren, 2007) to denote the dual sets of logic between consumers and supermarkets that interplay when it comes to shopping for “green” (or alternative) foods in the supermarket. Consumer strategies are constituted in a tendency towards reflexivity, where individuals tie their consumption to social issues like animal welfare, health, environmental degradation, and human rights and labour conditions (Dupuis, 2000), and encompasses the sets of heuristics consumers use to search for products that satisfy concerns over these issues. For example, a consumer might seek out eggs with a “free-range” label because they perceive it to indicate higher animal welfare standards or because it is perceived to be healthier to consume. Extending this concept, consumer strategies also refer to well-established non-ethical sets of routine behaviours and preferences like convenience, taste, freshness, status, and safety (Glanz, Basil, Maibach, Goldberg, & Snyder, 1998; Johnston, Szabo, & Rodney, 2011; Young, Hwang, McDonald, & Oates, 2010), and the negotiations around cost, and the willingness to pay, for products with these attributes (Hughner, McDonagh, Prothero, Shultz, & Stanton, 2007; de Pelsmacker, Driesen, & Rayp, 2005). As such, consumers might seek out foods that are easy to prepare at home, are affordable, and that have a particular appearance or quality assurance label associated with them.

Supermarket strategies refer to the techniques and systems in place that retailers use to effectively market their products to consumers. When it comes to sustainable food purchasing, the specific strategies employed by supermarkets are contextualized by a need for agricultural firms to accumulate capital in an increasingly post-modern society and maintain a positive social image (Guthman, 2004). Strategies include dictating supply chain practices and innovating new products and governance schemes to provide trustworthy foods to consumers that are, for example, notionally beneficial to human health, the environment, and/or society (Richards, Lawrence, & Burch, 2011; Smith, Lawrence, & Richards, 2010), such as Fair Trade and organic. Food retail is an increasingly competitive environment with slim profit margins, and so supermarket strategies also encompass the product presentation decisions made on the shopping floor to maximize sales and their use of retail space (LeBel, 2016). Some of these decisions include the product information schemes and other communication materials that stores use to convince consumers about the quality of their products, the use of sales and promotions, and the organization of products throughout the store.

Within this framework, key inquiries relating to alternative protein consumption include how strong supermarkets' attempts are to enable consumers in their alternative protein product choices, and how consumer-oriented their strategies are in relation to their internal pressures for profits (Oosterveer et al., 2007). These discussions point to a number of variables and indicators that might be useful for studying the consumption of alternative proteins in the context of supermarket environments (Oosterveer et al., 2007), such as: the availability of alternative protein products, including product variety and the amount of shelf space allocated to products with sustainable attributes; the presentation of products, including their visual prominence and the use of promotional signage and other information materials; and the organization of alternative proteins on the shopping floor in relation to other

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