

The Development of Relationships in the UK Organic Food Sector.

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Abstract

This paper explores the relationships between companies operating in the rapidly expanding UK organic food industry. Interview data show that the relationships within a network of smaller, pioneer organic-based companies have evolved on the basis of similar ethical values. These organisations often consider their knowledge of where to source organic products as being a source of competitive advantage. This network is now being challenged by the entry of larger companies into the market, operating from established positions in conventional food. This group is shown to demonstrate more management competence in building relationships. One example of this is the organic sourcing club for suppliers, run by J Sainsbury. The paper concludes by suggesting that the development of relationships between new organic suppliers and the multiple retailers will show a tendency towards partnerships.

Introduction

This paper presents empirical evidence concerning the development of networks of organisations in the UK organic food industry. The industry is conceived as being composed of two principal competing networks in the minds of many of the actors. These networks are contrasted in terms of their history, value systems, market power and competence in relationship building. The high level of growth of the industry and consequent supply shortages are loosening the structure of these networks. By analysing the interaction between actors of different principal networks, the research offers further insights into how the structure of networks can evolve (Low 1997). The prospects for future development of partnerships in the industry chain are discussed.

The paper begins with a brief review of relevant network concepts. It then gives a summary of the trends in the organic market in the UK together with a map of the industry and an outline of the methodology. The bulk of the paper consists of a discussion of the results from the interview survey in terms of relationships, sourcing and partnerships. The contribution of this data is summarised in the conclusion.

Network and Relationship Concepts

Relationship management

The paper will seek to explore the extent to which actors in different networks follow the advice in the literature on relationship management. (Blois 1998) maintains that the key question for managers is to decide what they want from their relationships with other organisations. There have been calls for managers to manage a portfolio of relationships (Ellram 1995; Olsen and Ellram 1997; Stuart 1997; Harland, Lamming et al. 1999), and managers are invited to develop lifecycle strategies for their relationships (Smeltzer 1997). Actors also need to bear in mind the simultaneous positive and negative effects of each

relationship on their network identity (Anderson, Hakansson et al. 1994). Competence in relationship-building can be thought of as a resource (Turnbull, Ford et al. 1996) and clearly organisations will have different abilities in this area.

Network Structure

(Low 1997) notes that tight network structures can loosen due to major environmental disturbances. He encourages managers to experiment with weak ties to organisations in an emerging network as a precursor to building stronger ties with selected partners later, even where the situation is dynamic and only incomplete or limited information is available. Such an approach can imply a change from single-sourcing to multi-sourcing as the network moves from being narrow to wide (Harland 1996). The ability of an organisation to build on weak ties with others in a different network relates to the permeability of the wall around the target network (Thorelli 1986). This paper analyses the potential influence of different value sets and network identity held by the actors in different networks on their efforts to explore new relationships in a changing situation.

The mapping of networks is inherently problematic and it is tempting for researchers to impose their own network analysis upon an industry (New and Mitropoulos 1995). The paper seeks to acknowledge the need for the networks to be defined partly by the perceptions of the actors involved (Turnbull, Ford et al. 1996), and therefore works with a taxonomy developed from the research data itself (see below), whilst accepting that the perceptions of the actors involved are bounded in terms of their network horizon (Anderson, Hakansson et al. 1994).

The Study

The primary objectives of the research were to investigate the relationships between firms in the UK organic supply chain, and to identify issues connected with the sourcing of organic food. The organic market in the UK was chosen for its potential to illustrate the interaction between two networks of different origin.

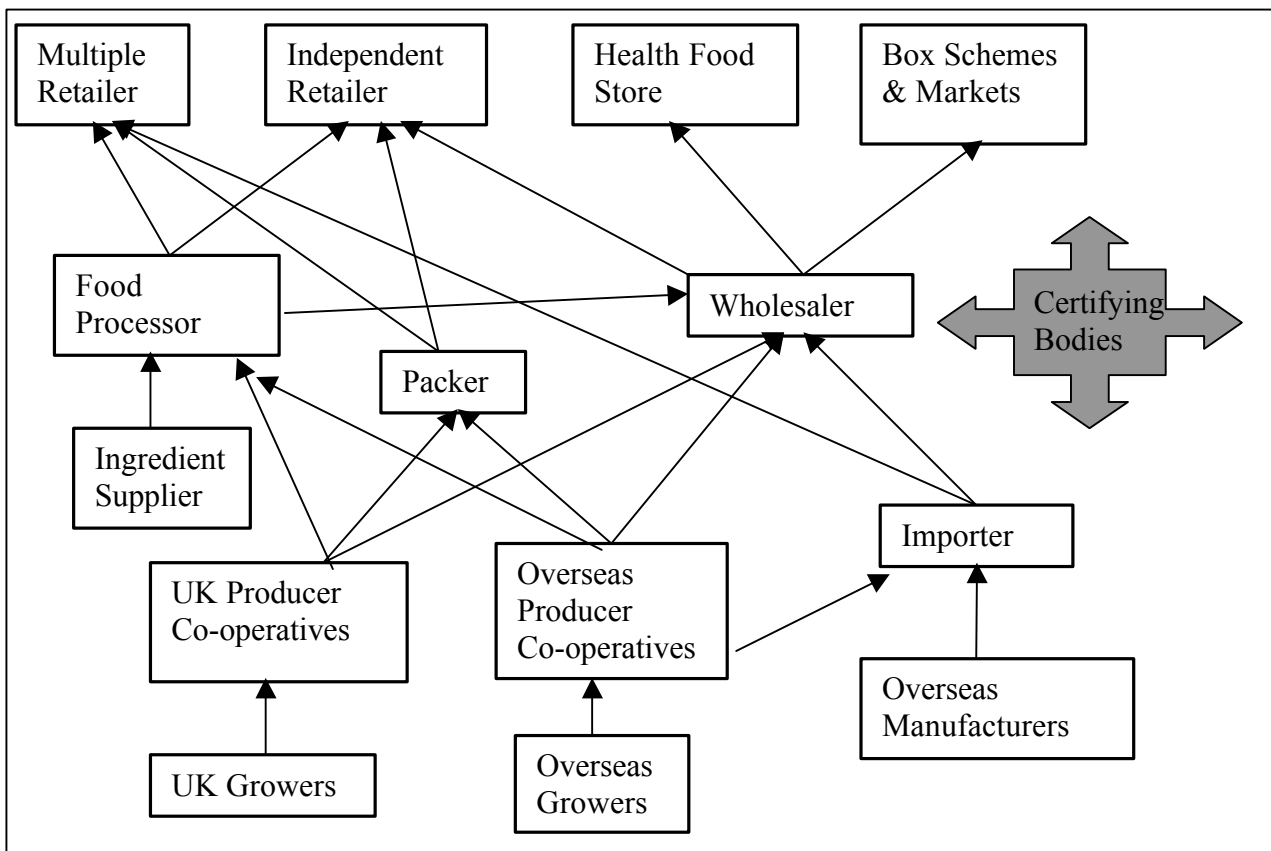
The Organic Market in the UK

For a food produced in the UK to acquire organic status it has to have been certified as organic by one of the seven UK certifying bodies operating under the control of the UK Register of Organic Food Standards (UKROFS). The status of imports is controlled by various EU certification bodies, sometimes via international certification organisations (Litchfield 1998). The dominant certifier in the UK is the Soil Association which has 80% of the market (Brenman 1999). New entrants face an entry barrier in terms of the cost of the conversion period between conventional food production to organic for producers and the need to segregate production for manufacturers. UK primary production rose by 25% from April 1998 to 1999, whereas demand grew by 40% in the same period. Supply shortages have encouraged imports to rise, and the opportunities have attracted a large number of new entrants and new product launches. 69% of organic food is sold via supermarkets, with 16% via independent retailers and health food shops. The remaining 15% is sold via farm-gate/box scheme/market stalls (Brenman 1999).

There is a trend towards greater vertical integration and closer relationships between partners in the food industry. The Food Safety Act 1990 and rationalisation of the supply base has led to greater supply chain co-ordination within the industry (Wilson 1996; Fearn 1998; Fearn and Hughes 1999; White 2000). Concerns regarding organic status and genetically modified organisms is adding further pressure towards closer relationships (Kerr 1999).

There have been increased demands for quality and customer service (Holström and Milgron 1991), and higher pressure on price from supermarkets (Urry 1999). Partly as a reaction to these trends, manufacturing organisations are said to want controls on the power of multiple retailers (Palmer and Hunt 1999), and the suppliers' trust of retailers is likely to be power-based (Hogarth-Scott 1999). There have been a number of take-overs of organic food organisations by conventional companies, for example the Mars take-over of Seeds of Change in 1997 (Wilkinson 1999). Experiments in partnership relationships include OMC and Saxon Foods (Orbach 1998) and the Organic Source Club at Sainsbury's (Blackburn 1999) (see below). A general overview of the structure of the industry is given in Figure 1 below.

Figure 1: Overview of Industry Structure



Sample

Semi-structured interviews were carried out focusing on the question of relationships and the sourcing of organic food. A wide range of producers, retailers, packers, importers, processors and wholesalers were included in the sample. Companies ranged in size from small owner-managed businesses through to subsidiaries of large multinationals, and representatives of the largest UK firms in the sector. Interviewees tended to be at managing director level for smaller companies, and sales, purchasing or technical manager for medium and large sized companies. A total of 31 interviews were completed, 22 of which were face-to-face and 9 by telephone. 29 companies participated, plus 2 industry experts. Approximately 80% of those contacted agreed to be interviewed, which reflects the interest in this area. All interviewees were offered confidentiality. A summary of the research findings was mailed to interviewees for further comment to help ensure the validity of the data collected.

The Findings

The actors within the industry have a fairly consistent shared taxonomy regarding which principal network their company belongs to. The distinction between the conventional network and the pioneer network is based upon the history of the organisation and whether its initial business was in organic foods, health foods or conventional foods, as shown in Figure 2.

Figure 2: Taxonomy of Company Types

| | Conventional Network | | Pioneer Network | |
|------------------|---------------------------------------------|---------------------------------------------|-------------------------------------------------------|-------------------------------------------------------------------------|
| Company Type | Pure Conventional | Hybrid Conventional | Hybrid Pioneer | Pure Pioneer |
| Characteristics | No organic activity | Non organic origin Some organic activity | Health food or organic origin | All activity organic Includes some recent entrants |
| Examples | Big Brand manufacturers eg Nestle, Heinz | Multiple retailers eg Waitrose | Branded health food manufacturers eg Rachels Dairy | Farms and processors eg Freshlands Baby Organix Village Bakery |
| Number in sample | 0 | 10 | 12 | 7 |

Relationships

Historical Context and Interpersonal Relationships

The pioneer network has been active for at least 20 years in the UK, primarily as a health food supply chain, but latterly including the provision of organic products. As (New and Mitropoulos 1995) suggest, much of the evolution of a network may be contingent upon historical factors. The actors within the pioneer network have always embraced the concept of organic products and have wished for a sustained growth of the industry both for business reasons and for the consumer to have access to more healthy food. As a sales manager for a pioneer hybrid manufacturer said:

“I’m doing a show at Harrogate for the health food business show and it’s great fun because there’ll be say four or five hundred retailers and they’re great, they’re really nice to meet, they’re very polite, and they’re very interested in the products and its good to deal with them and seeing all the wholesalers, I am good friends with all of the wholesalers. All of the buyers I see we actually go out socially and what have you. We do things and everybody’s known each other and everybody’s been in the business for quite a long time and all the rest of it.”

Several pioneer interviewees noted that the health food sector was close knit and could easily assess the credibility of new entrants. The personal aspects of inter-firm relationships was highlighted by many. Within the health food trade, many of these relationships had grown over many years, and were often based on a shared set of values about the importance of organics and health food in general. Some smaller organisations stated that personal relationships were critical to their relationships with customers and suppliers, and cited some colourful examples of success or failure in this respect. For example, the sales director of a small pioneer producer/manufacturer put it this way:

“We’re an odd business ... but I would look at the people in Sainsbury's and think they’re odd people. I don’t know. I might place too much emphasis on this point, but we might eventually run out of people that we like. So it’s going to be quite difficult to do business then. Or we might have to employ somebody just to like these people (i.e. the multiple retailers).”

The conventional network sees the organic market as a rapidly growing niche market with barriers to entry for producers and some manufacturers, with pure conventional brands such as Proctor and Gamble and Heinz having no organic equivalents. Given the dynamic nature of the organic market, many of the relationships between pioneers and hybrid conventional retailers are at an early stage (Ford 1980) and could be described as weak (Low 1997). For all suppliers, the relationships with supermarkets tended to be partly dependent on the number of buyers that the supplier had to deal with. This could range from a single dedicated organic buyer with many of the multiples, to 5 general category buyers for Safeway and 14 for Sainsbury. An illustration of these points comes from the sales manager of a large hybrid pioneer manufacturer:

Question: *“Now, the relationships you’ve got with the wholesalers, is the quality of the relationship any different to the multiples?”*

Sales Manager: *“A lot different, because you haven’t got buyer changes. So you’ve the same people for a lot longer. They are into ethical organic products anyway, so they’ll show a greater interest and they’ll list the product from day 1, whereas a multiple might take 8 weeks before it can get on the shelf because of their procedure. So, yes, we’ve got a much closer relationship with our health food wholesalers, and even with some of the small independent retailers. Because they’ll phone you and they’ll talk to you and, yes, definitely, yes.”*

The very high turnover amongst the buyers in many supermarkets made it difficult to deepen relationships on a personal level. Moreover, the buyer roles were seen to be crucial. Some supermarkets had a category buyer that was responsible for buying conventional and organic products. In these instances it was sometimes difficult to achieve access to shelf space. In other supermarkets, there was an internal tension between category buyers responsible for conventional products and shelf space, with other buyers responsible for ensuring that some organic lines took part of the shelf space controlled by their conventional counterparts.

Ethics and Values

The health food trade has generally been anti-meat and anti-sugar. The political aspects of networks is apparent here (Thorelli 1986) since the ethical views of certifiers and others can have a large impact on the prospects for individual organisations. The debate in the certifying bodies about whether to give organic status to products containing sugar (eg an organic Mars bar?) reflects general ethical concern. One pure pioneer producer/manufacturer forecast that conventional hybrids would not do as well as pure pioneers since they were open to the criticism that if the organic products were healthier for the consumer, why produce the conventional equivalent?

Some organisations are clearly more committed to the organic ideal than others. Many pioneer wholesalers are co-operatives, with some being perceived by fellow pioneers to have quite radical views on the environment, whereas others were seen to have been so successful that the financial rewards involved had “tainted” their ideals. One of these was definite that there were some organisations that they would not sell to on principle. At the more profit-driven end of the spectrum, some evidence emerged of cases where hybrid conventional companies used an organic offering as a way to obtain more conventional business. This was

done by offering very low prices (perhaps below cost) for the organic line, effectively excluding pure pioneer competitors. There is a potential concern for the industry as a whole about the integrity of such an approach for the management of organic food production.

Sourcing

The supply of organic food to the UK market is under constant pressure to meet demand. The pioneer network has had many years in which to build up information about sources of organic food from around the world. There are several examples of relationships with producers going back more than 5 years. Pioneer organisations typically run these relationships on the basis of trust, with only verbal undertakings as to the amount of produce to be taken in any given year. Commodity items were seen by interviewees as being less difficult to source than exotic or small volume ingredients. Once a source has been identified, there are often problems with the availability and/or the quality of the item.

Most conventional organisations prefer to deal with existing suppliers to source organic items, due to the costs of expanding the supplier base. The conventional suppliers also offer a robust, integrated and systematic approach which can respond quickly and effectively to any questions about the origins and quality of the supply. However conventional suppliers tend to be resistant to adding organic products. The research has found that conventional multiple retailers have sometimes pressured their existing suppliers to develop new organic lines (Eg on sausages and swedes). As a way of pre-empting this, some pure and hybrid conventional suppliers are researching the market to identify sources and prices for ingredients so that they are in a position to respond to enquiries from supermarket customers, and to be able to exploit any significant opportunities (see competence below).

The supply shortage has led conventional organisations that are relatively unfamiliar with the sources of supply to experiment with weak ties with pioneer organisations in order to obtain sourcing information. This is to be expected at the early stages of relationships (Ford 1980). Certifying bodies were also commonly approached for ideas on where to source an item. This has had the effect of generally loosening and widening the conventional and pioneer networks. Where the supply of product was uncertain, multi-sourcing was often employed by actors in both networks. Some pioneers claimed that their superior knowledge regarding sourcing was a key advantage, and were therefore selective as to which organisations they shared sourcing information with.

There was a degree of disquiet amongst pioneers concerning the entry of more powerful conventional organisations into the organic market. In the UK there have been many instances of the large conventional retailers purchasing the main part of the UK supply of certain product lines which has forced the pioneer network organisations to look elsewhere, usually abroad. However, the foreign sources look more secure, and some pioneer organisations are actually promoting themselves as potential sourcing consultancies to UK customers. The potential of such agents is mixed, since many of their potential customers wish to have direct links to the organic producer in order to minimise risk. Moreover, many of the current organic sourcing agencies do not talk the same language as the conventional firms (see competence below). Powerful conventional customers are able to insist on full traceability to the individual farm (citing their legal obligation of “due diligence”), thus removing the inherent knowledge advantages of the pioneer network.

Competence

The management of relationships with suppliers is more important than in the case of conventional foods, partly due to the shortage of good quality supply and the long lead time in conversion. Despite this, the research showed that the management competence of the smaller pioneer organisations was inferior in many respects to those in the conventional network. Several interviewees from small organisations were proud of their idiosyncratic nature, for example this quote from the director of a small hybrid pioneer company:

“You know, we don't do all this buzzword business, very few people in the health trade do, we are all just busy doing our own little bit, you know, and when you do talk to people from larger companies in the food industry it is just all far more serious...”

It was widely recognised that small pioneer suppliers had been failing to uphold delivery and quality promises. An illustration from the sales manager at one pure pioneer supplier was:

“Well I don't know what category management means, but by default I can see what, if I was a buyer, what I'd be looking for a supplier to do. ... I'm trying to feed all that information up there, where I can, which I think probably gets close to category management. I'm probably missing some fundamental points. I mean my background's agriculture - retailing is their job (laughs). If I'm telling Tesco's how to set about retailing, then something's gone very badly wrong. But maybe that's what they're looking for.”

Whilst the history of performance left much to be desired by the conventional network, there was widespread agreement from the conventional and pioneer organisations that the quality of management of the pioneer companies had been improving. Some pioneers were now subsidiaries of larger organisations. Others had recruited more professional managers with formal management qualifications. Some pioneers were experimenting with vendor-managed inventory and category management at some supermarkets. However, they generally lack the resources of the large conventional hybrid operators to audit their supply chains and guarantee consistent quality and service levels. The important factor here is the trend. Supermarkets have been fairly tolerant of shortcomings in much of the organic sector due to the limited choice of suppliers available. That is set to change in the next 18 months in many sectors, given the number of new entrants and new product offerings. It is therefore probable that the smaller suppliers will suffer if they do not improve their performance levels. In contrast, many of the conventional actors have already used weak ties to research potential sources of supply so that when their multiple retailer customers ask them to supply an organic product they are able to make an accurate quotation for cost and quality. This is done so as to support their reputation for manufacturing capability.

In recognition of the importance of relationship management and sourcing issues, Sainsbury's have been running an information sharing “club” for around 18 of its top organic suppliers (Blackburn 1999). The stated aim is to develop the organic sales at the supermarket together. There were 5 interviewees in the sample that attended the source club meetings, or were close colleagues of attendees. The general view was one of cautious optimism that it could work, especially as the member companies were committed to growing organics in general. However, it is clear that some pressure may have been applied to encourage companies to join, and that there are differences between members of the group as to their degree of commitment to the organic ideal. Substantial direct benefits have yet to emerge for most members. More concrete reservations were expressed by interviewees that were not members of the Sainsbury source club, two thirds of whom said that they *would not* join if invited.

Some said that they were leaders in their sector and would not want to share information with competitors. Other conventional hybrid suppliers noted that their organic sales were too small to justify any commitment. Small pioneer companies were concerned about the workload involved in being a member, compared to the benefits, whereas some were enthusiastic because it might lead to extra sales leads. Whatever the attitude of the existing and potential club members, it is clear that this success or otherwise of such ventures as the Sainsbury Source Club will be critical to the future of pioneer organisations in general.

The Challenge of Conventional Organisations

The power of the conventional hybrid supermarkets is generally widespread in the organic market (much as it is in conventional foods). Examples found included:

- Insistence on tight specifications
- Taking innovative ideas from suppliers and capturing sales via own label branding
- Holding down prices such that organic products are sold at a lower profit margin to the supplier than conventional lines
- Insistence on Soil Association certification for own label lines
- Controlling the choice of subcontractors that suppliers use
- Taking preference over smaller competitors on products in short supply (eg beetroot by Sainsbury)
- De facto exclusivity in terms of denying suppliers the right to supply key competitors

There is a general tension between conventional hybrid retailers and their conventional hybrid suppliers in that the latter do not usually wish to develop organic product lines, partly due to the inflexibility of much of their manufacturing facilities. This is despite the fact that product innovation is easier for own label suppliers compared with the big branded conventional manufacturing organisations (Harvey 2000). As a technical manager at one large own-label hybrid conventional manufacturer said:

Question: *“Organics is a small business area, the margins are low, it's causing you a lot of hassle, why do it?”*

Interviewee: *“We see it as a strategic part of what we actually do. We service (Multiple A) with (these products). And rather than let somebody else come in to do (these products), we prefer to service them and say ‘right, we look at the market as a whole, and part of our market that we are in has to be organics’, and therefore, we do it because we need to do it, rather than because we want to do it”*

This is reinforced by the comments of another technical manager at a different hybrid conventional manufacturer:

“There is a lot of hassle-factor in the whole area. It is back to saying that every extra raw material that we have, we have to manage. We have to check it when it comes in, we have to store it separately, we have to count it on a stock take. It is floor space tied up, because we can't stack it 3 or 4 deep for segregation purposes, so it is just another hassle for every extra one...the worst case is we have an organic match for everything and we would have 600 raw materials, and that is just a complete nonsense.”

The tension in the case of conventional hybrid retailers and the pioneer suppliers relates to the management competence of the pioneer groups in the context of the power of the

supermarkets, and the potential clash of cultures and values between the partners. There are clearly positive volume effects on a pioneer company's activity if it starts to supply a multiple. However, this exposes them to potential negative effects (Anderson, Hakansson et al. 1994), such as those identified by a sales manager at a pioneer hybrid:

“It is very lucky if we get the chance to do something for our benefit though, because basically all the supermarkets hold all the major cards in their hand, and they are the people calling the shots... they are very very ruthless and cut throat. And obviously from the health food trade they have no morals whatsoever, and it is very difficult dealing with them because they do a lot of pretty immoral things, and treat us very badly.”

In any relationship, there are limits to how much this power can be exploited before the more dependent partner leaves the relationship (McDonald 1999). In addition, the ability of supermarkets to exercise their power is moderated by certain features of the organic market. Some pioneer retailers have developed partnerships with local growers in order to secure supply, whilst others manage the limited supply of produce to their own benefit, even if it means benefiting a customer's competitor without their knowledge. There are some specific sectors where there is such a shortage of product, and the choice of suppliers is one or two at most, where examples of highly supportive behaviour by supermarkets has been found. Whilst there is still pressure to reduce prices and offer promotions, the small innovative supplier in the right sector has a degree of bargaining power, and may even be approached to contribute to joint new product development with a multiple. Even where the number of potential suppliers rises to three, there is still the possibility of holding reasonable margins by suppliers. But where there is a large choice of suppliers (say 5 or more) then the supermarkets are able to pressure their suppliers much as they would in conventional areas in terms of price and new product development.

The degree of interdependence and the relative power of each partner are important factors in influencing the success of a relationship. It is perceived power which is important (Turnbull, Ford et al. 1996), and fear and mistrust of supermarkets was reported amongst UK and EU producers alike. This seemed to be a fairly blanket distrust (Blois 1999), perhaps reflecting the distance between the actors and the current Competition Commission inquiry into supermarkets in the UK. (Smeltzer 1997) argues that a lack of trust is a prime cause of failure of partnerships and recommends a selective approach to picking partners. He suggests that buyers easily revert to cost driven behaviour, and this is predicted by most interviewees as being inevitable over the course of the next year or so. This perspective on the research data should forewarn potential organic suppliers (eg members of the Sainsbury Organic Source Club) as to the likely outcomes of a deeper relationship with conventional hybrid retailers which may simply lead to retailer domination via retailer leadership or long term partnering (Kim and Frazier 1996). By contrast, the more interdependent relationships appear to exist between trading partners in a wholly pioneer supply chain, partly due to the fact that organic foods are central to their organisational purpose. Indeed, for firms that fail the competence test with major conventional retailers, the likely refuge will be operating solely in the pioneer network via vegetable box schemes or other non-mainstream activity. Conventional organisations seem to have appropriate strategies which follow much of the advice noted at the start of the paper. It is less clear that pioneer organisations have the resources necessary to develop such a mature view of the task of relationship management.

Conclusion

The research shows that pioneer organisations have shared personal contacts and certain ethical ideals. They have built up relationships with organisations able to supply organic food in a context of an overall shortage of supply. They are improving their management competence in the face of increased competition and the possibilities offered by loose ties with conventional organisations. The research suggests that as market volume grows, more pure conventional suppliers will succumb to the pressure to enter the market and conventional multiples will concentrate on deepening their relationships with a select group of suppliers. This will include those pioneer organisations who are able to professionally manage their product quality and relationships. As these relationships mature, the conventional network will once again tighten up as the industry logic of integrated supply chains makes itself felt. Those pioneer organisations that fail to meet this challenge will continue to function at a reduced level in the pioneer network, which still accounts for over a quarter of organic food sold in the UK. It is here that the ethical context still retains some importance and where personal relationships built up over many years still act as a positive source of network identity.

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