

Creating Value through Cooperation? The Case of Farmers' Markets in New Zealand.

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Abstract

Farmers' markets have provided new alternatives for small producers to obtain direct distribution to consumers over the past few years. The growth has been spectacular in several countries and this paper aims to understand this growth and how value might be created by looking at participation and cooperation amongst the traders at these markets.

Over 80 percent of the traders at the markets were involved in some form of cooperative activity reinforcing the idea of markets as community based activities with high levels of interdependence amongst participants. Cooperation could be identified in different categories and increased over the length of time trading at the market but could not be directly related to performance or the reasons traders offered for doing business at the market.

Introduction

A recent phenomenon that has developed in a number of countries, including Australia, Great Britain, New Zealand and the United States is the organization of “farmers’ markets”. While literature on the growth of these is limited, it is clear that they have emerged as a highly successful form of distribution for many small producers over the last few years (Fischer 2004). By definition, this very success means that these markets have found a different way to create value from that being achieved by other food distribution channels. After reviewing the background to the growth in farmers’ markets throughout the world (including our own data from New Zealand), we aim to examine how the organizers and stallholders of these markets perceive value is being created. In doing this we have drawn away from the traditional view of a dyadic exchange process between buyer and seller as the only way in which value may be created to include the idea of value being generated at a community level. While this idea is not entirely new (e.g. Tallman et al 2004) it has provided an opportunity to integrate ideas across what appear to be distinct streams of literature including agricultural marketing, marketing channels and consumer behaviour.

The Farmers’ Market Phenomenon

Exact definition and categorization of markets is not easy. Sherry (1990) provides one classification of markets based on two dimensions relating to (1) the degree of formalization in the structure and (2) an economic versus festive function. While many other typologies could be generated, Sherry’s classification is sufficient to demonstrate the wide and varied nature of formats captured under the label of “markets”. Since a market is an aggregation of traders no two agglomerations will ever be exactly the same but farmers’ markets have been described as essentially those that sell “predominantly fresh food, operate regularly within a community, at a focal public location that provide a suitable environment for farmers and other food producers to sell farm origin and other value-added processes food products direct to the consumer” (Adams 2002).

It is clear from our investigations, which are described later, that one essential element is missing from this description. Farmers’ markets are also clearly the domain of small businesses. This is implied in descriptions that refer to the local nature or community linkages, but the small business aspect of farmers’ markets is reinforced by the overall statistics regarding enterprise size employment figures in the agricultural sector. According to the 2003 Agricultural Production census, New Zealand has an estimated 70,000 farms of which 33,900 are smaller than 30 hectares. These 70,000 farms (which include forestry units owned by major multinationals) are controlled by 11,969 enterprises. 10,951 of these enterprises employ less than five people and only 57 employ more than 50 people. Further, the large enterprises are concentrated in sheep farming and forestry with a handful of beef and deer farms. Farmers’ markets mainly provide outlets for growers of fruit and vegetables, plant nurseries, herbalists, and assorted others, such as local cheese producers, who dominate the under 30 hectare category (Statistics New Zealand 2003).

While local markets for the direct selling of farm produce to consumers have existed for centuries in many countries they have never existed in New Zealand or Australia (apart from a sort of farmers' market within the Queen Victoria Market Melbourne, opened in March 1878). In both countries the first farmers' markets were established in 1998 and by 2004 70 had been established in Australia and 10 in New Zealand. Web searches reveal similar trends in the USA where nearly every state now appears to have a local organisation for farmers' markets and the growth has been just as spectacular in the UK where produce markets have always been a feature of food channels. Ritson (2003) records the founding of over 300 new farmers' markets in the previous five years.

While hundreds of news reports on farmers' markets can be accessed on the world-wide web actual research on the growth is very sketchy so that even the first stage of our work was the simple identification and description of the farmers' markets that have been established in New Zealand in the last six years (Guthrie, Lawson and Guthrie 2004). Szmigin, Maddock and Carrigan (2003) reviewed literature associated with potential consumer preferences in relation to markets and identified a range of reasons that could be associated with choice:

- fit with traditional, reactionary lifestyles;
- preferences for organics;
- beliefs in environmental benefits;
- "relocation" of food and reconnection with producers;
- quality of goods;
- speciality of produce.

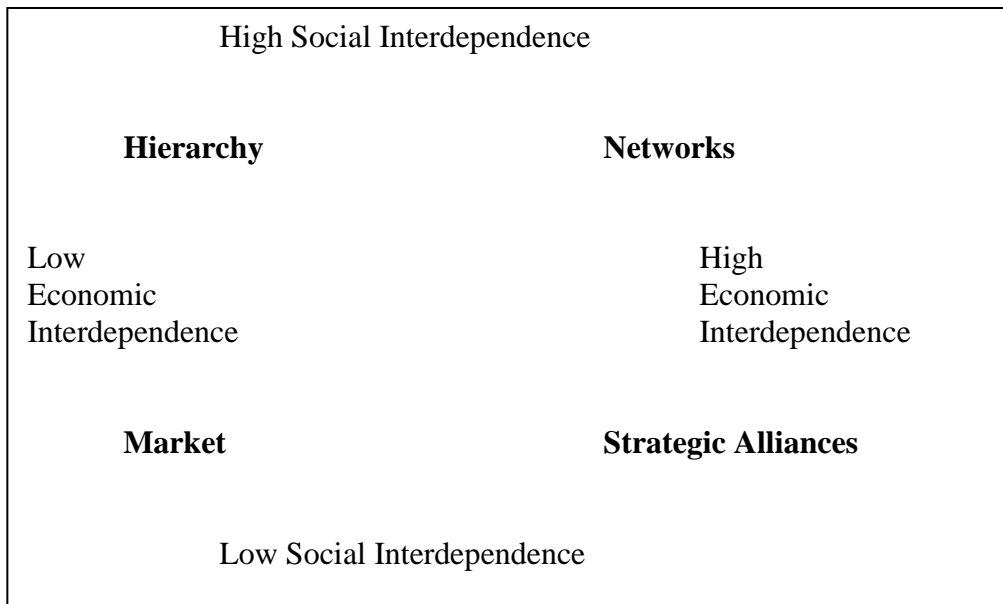
In the UK farmers' markets seem to have been especially successful with older consumers and Szmigin et al explain that this group may be particularly attracted to farmers' markets because of the "community" aspects associated with them. However, it is relevant to note that they are also a group that would have been more familiar with small personal retailing methods before supermarkets became universal suppliers of fresh produce in the 1970s. Also in the UK, Youngs (2003) has conducted a regional survey of markets in the north-west of England. Her results also emphasise older consumers looking for "assured" produce. Behind both these papers is the notion that value for consumers is being created in part by a retail form that offers reassurance to apprehensive consumers following several farming and food scares such as salmonella, "mad cow" and "foot and mouth" disease. Some of the same issues emerge in the US but more of the American studies place emphasis of community support and related environmental benefits, particularly the idea of "food miles". This is a measure of the distance, and hence energy usage, involved in bringing a meal to the table (Wade 2002). While apprehensiveness over aspects of agribusiness and environmental concerns may be features in the UK and the USA, neither have been major issues in Australia or New Zealand. Fischer's work in 2004 provides the first systematic study of suppliers using farmer markets in Australia and (similar to New Zealand) it recognises the dominant role of the large supermarkets in food distribution. Their selling policies are based on "Anytime, everywhere, everything the same". This means their procurement policies are centrally driven and they demand bulk orders from specific price competitive producers and farmers. They do not acknowledge local peculiarities. This has forced small local traders to search for other methods of distribution and created potential opportunities to supply

consumers wanting variation from the supermarket formula (Fischer 2004). A New South Wales government sponsored conference on farmers' markets in 2002 emphasised local community benefits (Adams 2002). Important themes in relation to the community emphasise the regeneration of shopping areas, substantive economic impacts (regional multipliers are reckoned to be high), and positive social impacts such as community pride.

The continued reference to community dimensions in relation to farmers' markets can only arise because farmers are willing to come together and recognise the potential benefits that emerge from cooperative activity. It is interesting to note that there is a rich history of cooperation in the distribution of agricultural and food products starting with the formation of the Rochdale Cooperative in England in 1844. Not only have farmers markets not yet been linked with the cooperative literature in agriculture but theories of cooperation developed by agricultural economists in the 1940s and 1950s (e.g. Robotka 1947; Abrahamsen 1957) have not been integrated into thinking on cooperation based on systems and networks. While agricultural economists have provided theory and guidelines relating to return, risk and organisational structure to explain why cooperation can work, the research in networks and systems is more closely aligned to theory based in resource advantage and emphasises combinatorial capabilities, especially in relation to regional groupings like industry clusters (Kogut 2000; Kogut and Zander 1992; Tallman et al 2004). Two items of research that do take a network perspective to analysing issues relating to cooperatives are those by Borst (1999) and Gargiulo (1992) but neither of these help develop theory which explain how cooperatives and cooperative ventures, such as farmers markets, can provide enduring value propositions. This lack of integration of these different strands of literature is acknowledged by Theuri (2004) in a call for papers for a conference to be led by Oliver Williamson at Muenster in September 2004.

Drawing on work by Williamson (1975, 1985) and Wilkinson and Mattsson (1993), Perry and Pyatt (1995) provide a diagrammatic view of network theory:

Figure One: Interdependence and Networks



The rationale for cooperative behaviour lies in interdependence and we anticipate that this is where the reasons behind the success of farmers' markets lie. Farmers' markets have much in common with the established formats for agricultural cooperatives and we expect that they are characterised by high levels of interdependence. As new phenomena it may be that, at this stage, economic interdependence may be higher than social interdependence. This would be consistent with Granovetter's view of embeddedness in social relations (1985). The principles of the cooperative movement established in the Rochdale venture embrace democratic control, economic interdependence through joint and at least partly indivisible reserves, self-help, education and training and community concern. These appear to be key features of the farmers' market movement – for example, all but one of the New Zealand markets are run by voluntary local trusts. Also, consumer protection and the provision of assured quality goods at fair prices by local traders were key principles in the foundation of the Rochdale Cooperative. The drives to establish the Cooperative in the 1840s have much in common with the issues discussed by Szmigin et al (op cit) and Youngs (op cit) in relation to farmers' markets in the UK. Thus we would argue that farmers' markets are essentially a network based operation that potentially derives competitive advantage from cooperation. Because of the very limited scope of previous research on farmers' markets, the data gathered for this study was largely exploratory and it does not allow for the direct testing of hypotheses relating to cooperation. However, we are able to examine the extent and nature of cooperative behaviour between traders and how it may be linked to their other characteristics.

Methodology

The first step in this research was to establish the whereabouts of markets selling food in New Zealand. Based on the assumption that all markets need some form of council licence to operate, all local councils in New Zealand were contacted. 63 out of 75 local councils responded including all the councils covering the urban population centres except for Hutt City. From this a database of most markets in New Zealand was created and all organisers of the markets were contacted to establish market particulars such as size, location, times and days of operation and proportions of stallholders selling fresh food. New Zealand privacy legislation forbids organisers passing on names and other details of the stallholders so four main markets were then selected for in depth analysis by observation, interviewing organisers and surveying stallholders. These markets were the Whangarei Growers Market in Northland, The Hawke's Bay Farmers' Market in Hastings, The Village Growers' Market in Havelock North and the Otago Farmers' Market in Dunedin. The first three of these were amongst the first founded in New Zealand while the last was founded in 2003 and was included both for convenience and for contrast as a new market. The market in Havelock North is a seasonal market and operates only through six months over summer. All the rest operate throughout the year. Conflict with another research project involving the Otago farmers' market subsequently reduced participation from stallholders at that centre, but in total 53 responses were obtained from 106 stallholders contacted at all four markets.

Stallholders were personally contacted at the market and subsequently supplied with survey forms by mail. Organisers at the selected markets were interviewed personally while others were interviewed by telephone and/or email. Interviews with organisers included overall material on the history of the market, regulations covering its operation and information on customers and trading patterns. Data from stallholders was gathered on the following areas:

- business "demographics"- including product areas and length of time trading at the market;
- reasons for trading at the market – including relative margins earned, access to other distribution channels;
- perceptions of customers and customers motives;
- cooperative activities undertaken
- competitive responses from other channels or suppliers;
- memberships and certifications for organic or other organisations.

Most questions were open-ended and allowed free responses which were then coded as nominal variables. The data was analysed in SPSS using frequency counts, crosstabulations with exact tests to overcome issues with some small expected cell sizes, and optimal scaling. The latter allows for principal components analysis of nominal data and it has been used in an exploratory way as a data reduction method. Named linkages were too sparse amongst a four diverse markets to build a network diagram of cooperating businesses so cooperation has been examined in terms of the number of linkages identified by each respondent and optimal scaling was also used to identify the underlying structure of cooperation amongst traders at the markets. The membership and certification information proved too basic to understand whether it

represented a “sleeping” link or something more active and it has not been incorporated into the summary of cooperation given below.

Findings and Discussion

1. *Characteristics of Stallholders.* This section draws on data summarised in Guthrie, Lawson and Guthrie (2003). The great majority of stalls at the markets sampled sold fruit and vegetables (70 percent). Herbs and spices (12 percent), plants and flowers (10 percent) and preserves and sauces (10 percent) were the next most common products. (Note figures sum to more than 100 percent because of multiple responses). Despite the domination of fruit and vegetable stalls in the markets, the most interesting statistic is the range of products on sale – across the 56 respondents there were 19 distinctly different classes of products. While many of these were still “fresh foods” such as bread, cheese, confectionary, eggs and meat there were also cosmetics and cooked “takeaway” foods.

Local rules influence the range of products farmers are able to sell so that at Havelock North, items such as lavender hand cream and sheep manure may be sold because both are produced as part of “normal farming operations”. In Whangarei the guidelines are somewhat stricter and fish, meat and cakes have only just been added to complement fresh fruit, vegetables and plants.

While three of the markets from which most of the sample was drawn trade all year, only one third of the stall holders who were surveyed did so. Reasons for this are generally climatic and they reflect the limited product range supplied by most individual stallholders. A consequence is that the product mix in the markets will change considerably throughout the seasons. As the product mix changes so may the exact value that is being created for the customer but it is interesting to note that this is not reflected either in the work of Szimigin et al (2003), Youngs (2003), Lawson et al (2002) or in feedback from the organisers and stallholders for this research. It seems that customers view the market in a collective way and form overall opinions based on a range of issues like product, atmosphere and contact with traders as opposed to their attitudes being led by responses to individual stallholders.

One consequence of seasonal participation is that one would expect fewer cooperative ties from traders whose links are not being continually reinforced by weekly participation in the market. An independent samples t-test confirms this premise. Those trading all year have a mean of 1.4 cooperative ties with other stallholders while those trading seasonally had mean of exactly 1.0 ties ($p=.044$). Perversely a significance test of the number of cooperative ties by market location does not give a statistically significant result. One would expect lower levels of cooperation in the summer market because relationships are not continuously maintained but the stallholders at Havelock North have as many ties as Hastings and Whangarei. Stallholders at Dunedin claim fewer cooperative ties, as one would expect with a newer market, but the statistical tests do not show a significant difference. However a Spearman rank correlation between the length of time trading at the markets and the number of cooperative links did reveal a positive and significant result ($r=0.3$; $p=0.29$). The difference in the significance of these last two results is explained by the fact that just over a quarter of our total sample (28 percent) had been trading for less than 12 months. Organisers explain this as generally

reflecting the continued growth of the established markets rather than a “roll over” of stalls over time.

2. Other Channels Used. Only 12 percent of the stallholders questioned relied on the farmers’ market as their only distribution outlet. Nearly half the stallholders also traded through other small local retailers while 36 percent also had their own farm shop or farm gate sales. Most stallholders used a combination of two or three alternative channels to distribute products and the range of channels included the internet, the major supermarket chains, restaurants and catering outlets and tourist shops. One figure of note is the small number of traders who also used the supermarket chains – only eight of the 53 respondents. Lawson, Guthrie and Hlaihel (op cit) noted the problems that small producers often had meeting the supply and price requirements imposed by the two supermarket chains who dominated three quarters of grocery retailing in New Zealand. Another reason why there are few stallholders who also distribute through the main supermarkets may be that they are actively excluded by those organisations because they have chosen to use competing channels such as the markets. While this would actually be illegal under New Zealand competition law there is a definite feeling from some stallholders that this occurs.

While the reasons for trading through other channels were not investigated with the stallholders as part of this research, it is interesting to note that the level of cooperation among stallholders does vary according to the other distribution channels used. Those traders who also distribute through “farm” related outlets such as their own shops, farm gates and other markets to the one where they were interviewed, had significantly ($p=0.09$) higher levels of cooperation (mean of 1.59 links) compared to traders who used other wholesalers, food distributors or the catering trade (mean 1.12 links). The reason for this is far from clear but a possible explanation is that these traders have less cross-channel conflict than others who are also supplying distributors competing for the same end consumers as the market – and as noted above cross-channel conflict was definitely an issue for some traders. It would appear that most work on cooperation and value (e.g. Campbell 1998) has been conducted within single channels and certainly in our context we are unsure how value differs across multiple channels and whether different combinations of channels effect issues like cooperation and the creation of value within the farmers’ market structure.

3. Reasons for and Benefits from Trading at the Market. Just as the reasons attributed to consumers for shopping at markets as opposed to other forms of retail outlets help understand the value created from the consumers’ perspective, insights into the value added from a supplier’s perspective may be ascertained by examining the stallholders’ motives for trading at the market. Traders were asked to supply their reasons for using the market in an unprompted way. Responses were simply coded into categories by a research assistant and checked for consistency of interpretation. In total 10 reasons were identified that had frequency counts of more than three¹:

- the desire to obtain a fair price
- the wish to avoid middlemen
- to obtain a supplementary income

¹ Three is the minimum frequency count required for optimal scaling procedures.

- convenience
- because the market was well supported
- atmosphere of the market
- to be able to have contact with the final consumer
- to promote their products
- as a hobby
- because they were too small to trade elsewhere.

Clearly these reasons are not uncorrelated and they represent a mixture of financial, marketing and social objectives which fits the idea that markets are likely to be concerned with both economic and social interdependence. In order to understand any patterns that may lie behind these reasons optimal scaling of the data was attempted. A three dimensional solution gave a total Cronbach alpha of .860 explaining 42% of the variance. The component loadings are given in table 1.

Table 1: Component loadings for Reasons for Trading at the Market

Reason for trading at market	Dimension		
	1	2	3
fair price	.339	.323	.162
avoid middlemen	.096	-.152	.807
supplementary income	-.154	-.033	-.047
convenience	-.109	.362	-.086
market well supported	.117	.577	-.491
atmosphere	.328	.469	.001
contact with consumer	-.447	-.047	.228
promote products	-.637	-.320	-.276
hobby	.335	-.477	-.463
too small to trade elsewhere.	.792	-.144	.090

Dimension one appears to be associated with size and constrained choice in other options for distribution. This would apply to those stallholders also trading as a hobby. Contact with customers and promotion of products are inversely associated with these aspects. Dimension two is concerned with the “social” aspects of markets – the atmosphere and a well supported market – while dimension three is concerned with avoiding middlemen. It is surprising that fair price is not associated with this since our discussions with stallholders did emphasise how some middlemen set too stringent conditions in terms of price, continuity of supply, and variety of produce.

Clearly farmers’ markets create value for traders in different ways. Considering the interdependent nature of the markets we were interested to discover if these reasons were in any way related to the levels of cooperation between the stallholders. Our expectation was potentially that those traders more aligned with dimension two would be more inclined to cooperation since atmosphere and support are generated by all traders. However all tests of association failed to show any significant results with the number of cooperative actions undertaken by the stallholders.

4. *Cooperation at the Market.* Cooperation was ascertained by the same unprompted methods as described in the previous section. Respondents were asked to identify actions and relationships where they worked with other stallholders. These were easily categorised into the following items:

- sharing equipment at the markets
- providing relief to man each other's stalls
- sharing promotions at the market
- sharing ideas
- sharing costs on market days
- referring customers
- selling each other's product
- encouraging new traders to the market
- no form of cooperation.

Of these the encouraging new traders, manning stalls, sharing ideas and selling each other's product are the most frequent forms of cooperation. It is relevant to note that at least two of these are knowledge related and are consistent with ideas that competitive advantage in networks is mainly derived from generating knowledge (Kogut and Zander 1992; Kogut 2000). The number of cooperative links for each trader can be seen in table 2. Only 10 members of the sample had no form of cooperation with others while 2 stallholders cooperated on four of the items. As noted above, the number of links was clearly associated with the time that the stallholder had traded at the market. However, tests to see if cooperation, as expressed in the number of linkages, was related to performance through additional margins did not show significant results.

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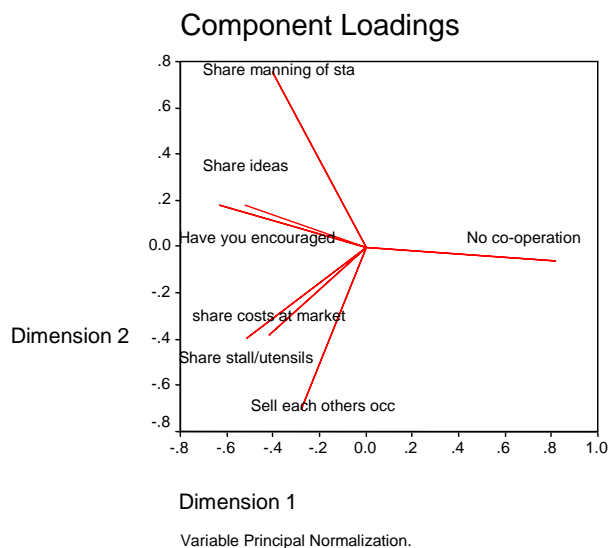
Optimal scaling of the data on cooperation suggested a two dimensional solution with a Cronbach's alpha of .890 explaining 49.5% of variance. Component loadings are given in table 3 and figure two displays these graphically. While it is clear that dimension one is concerned with lack of cooperation, figure two is interesting because it shows that the forms of cooperation that are distinguished on dimension two broadly fall into three categories. These are concerned with "production" aspects (equipment, costs and product); marketing and information

aspects (encouragement, ideas and promotions); and “personnel” aspects (manning stalls).

Table 3: Component Loadings for Forms of Cooperation

Form of Cooperation	Dimension	
	1	2
sharing equipment	-.552	.405
manning each other’s stalls	-.372	-.708
sharing promotions at the market	-.066	-.179
sharing ideas	-.572	-.294
sharing costs on market days	-.459	.467
referring customers	-.154	-.025
selling each other’s product	-.360	.666
encouraging new traders to the market	-.531	-.148
no form of cooperation.	.795	.192

Figure Two: Component Loadings for Forms of Cooperation



Discussion and Conclusions

Farmers’ markets have provided new alternatives for small producers to obtain direct distribution to consumers over the past few years. The growth has been spectacular in several countries and this paper has examined how they may be creating value by looking at participation and cooperation amongst the traders at these markets.

Nearly all the markets are organised by local community trusts and almost by definition rely on a degree of interdependency among the traders. We identified a range of cooperative activities that analysis suggests fall into three broad categories relating to materials and costs, marketing efforts and the reciprocal manning of stalls. Some element of cooperation was identified by over 80 percent of respondents and the

number of cooperative activities generally increased the longer the stallholders had participated in the market. However, cooperation did not seem to vary according to the reasons traders gave for participating in markets. Neither was it possible to identify whether levels of cooperation influenced performance in terms of the margins earned at the market compared to other channels. Nearly all the traders used other distribution channels apart from the markets and an interesting observation appears to be that the traders who relied on farm gate sales and other markets cooperated more than other traders who might have more cross-channel conflict. Such conflict is recognised by many traders and it is an interesting question as to whether this might inhibit some people offering whole hearted participation in the market – something that might be reflected in less social integration and less cooperative activity.

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