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LEGITIMACY OF TERMINAL WHOLESALE MARKETS AS STAKEHOLDERS OF LOCAL FOOD CHAINS

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ABSTRACT

Terminal wholesale markets (TWM) aim at supplying consumption areas, especially urban areas. They are physical places where professional agents (producers, wholesalers, retailers, restaurant owners) meet to sell and buy wholesale food products. Since the late 1970s, French TWM have been facing increasing competition. More recently, in a context of change toward food re-localization, their legitimacy as intermediaries is also questioned. This article aims to analyze the strategies that French TWM implement in order to re-legitimate themselves as stakeholders of more local and sustainable food systems. We focus on two cases in Auvergne-Rhône-Alpes Region, the Lyon-Corbas private market and Grenoble « Market of national interest ». The purpose is to assess their 'hybridity', between 'alternative' and 'conventional', how this may restore their legitimacy and allow them to maintain their activity.

Key words

Local food systems; hybridization; alternative and conventional food systems; distribution channels; France

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1. CONTEXT, OBJECTIVES AND RESEARCH QUESTION

Terminal wholesale markets (TWM)[1] are physical places where professional agents meet to sell and buy wholesale food products. They aim at supplying consumption areas, especially urban areas (Lauret and Soufflet, 1985). In post second world war and starved Europe, they were a major tool for food security policies (Cadilhon et al., 2003). However, from the end of the 1970s, significant changes in the economic and spatial organization of food chains (industrialization, concentration, integration …) led to the breakup of traditional food distribution channels. The role of wholesalers and wholesale markets in distribution channels has dramatically decreased (Gadde, 2012; Lauret and Soufflet, 1985; Michel, 2016; Wackermann, 1977). More recently, in the 2000s, the need for sustainable food chains led to a dramatic rise of private and public initiatives for developing "alternative food systems" (Maye and Kirwan, 2010). These initiatives aim at re-connecting producers and consumers (Albrecht and Smithers, 2018), to "re-socialize" and "re-spatialize" food (Marsden et al., 2000; Renting et al., 2003). There is a growing enthusiasm for re-localized food systems and distribution channels that "cut out the middlemen" who are obstacles to the direct relation between producers and consumers (Berti and Mulligan, 2016; Bloom and Hinrichs, 2010; Mount, 2012).

Since the late 1970s, wholesalers and wholesale markets have been facing increasing competition (by manufacturers and supermarket chains) and have been suffering a loss of legitimacy as intermediaries (Michel, 2016). However, Cadilhon *et alii* (2003) note that the dynamism of wholesale markets depends partly on the ability of market managers to adapt to the evolutions of demand. For a few years, in France, TWMs have initiated deep changes and have claimed to be stakeholders of food system re-localization (Fédération des Marchés de

[1] Assembly wholesale markets (like veilings or auction markets) are another type of wholesale markets. They are located in production areas. They aim to collect and spread agricultural products.

gros de France, 2016). Moreover, the recent rise of local food procurement policies seem to give them new opportunities. On the one hand, the strategic role of wholesalers and TWMs in improving urban logistics is more and more considered (Bricas et al., 2017b; Morganti and Gonzalez-Feliu, 2015; Sirjean, 2015; Sirjean and Boudouin, 2016). On the other hand, their commercial functions and some of their specific characteristics (proximity with local suppliers, links with rural areas, role in the structuration of local value chains, preservation of independent and convenience retailers …) are also emphasized (Blézat Consulting, 2012; Perrin and Soulard, 2014).

Wholesale markets have an intermediate position between short and long supply chains. Moreover, 'scaling-up' local food systems is identified as the "next hurdle facing the local food movement" (Mount, 2012, p. 107). Scaling-up means having broader systemic impacts by improving market accessibility for producers and making local produce widely available to all consumers (Clark and Inwood, 2016; Friedmann, 2007; Johnson et al., 2016). TWM could thus take advantage of the critics addressed to the conventional food system and its distribution model and grasp the opportunity to regain legitimacy.

This paper is a first step in a broader project to study the role that TWM may have in food systems re-localization and the development of more sustainable food chains. The general objective is to assess their 'hybrid' status – between 'alternative' and 'conventional' (Bloom and Hinrichs, 2011) - and how this status may restore their legitimacy and allow them to maintain their activity. In literature about local or alternative food networks a number of papers or reports have addressed the role of regional or local food hubs (FH) (Berti and Mulligan, 2016). However, this literature mainly focuses on North-American cases. Moreover, the case of TWM as a specific type of FH is poorly addressed or authors only consider TWM logistic function (Morganti and Gonzalez-Feliu, 2015; Sirjean, 2015).

This first research step consists in analyzing the strategies that terminal wholesale markets implement in their changing environment in order to re-legitimate themselves as stakeholders of more local and sustainable food systems. This paper presents the national strategy carried on by the French federation of TWM. It then analyzes the strategy of two specific TWM in Auvergne-Rhône-Alpes region: the Lyon-Corbas private TWM and the Grenoble Market of National Interest (MIN).

The first part presents French terminal wholesale markets and their trajectories. The second part presents the analysis framework. Results are presented and discussed in the following parts.

2. Food wholesale markets are losing momentum in France

2.1. Wholesale markets: terminal physical markets

TWM are physical markets. The goods are exhibited "on the floor"[2] and the price is negotiated by mutual agreement partly based on a sensory evaluation of the products. Buyers are independent retailers (sedentary or itinerant, specialized or not), restaurant owners, and, exceptionally, catering companies and central purchasing centers of large-scale retailers. Some intermediaries such as brokers or sales agents may also act on behalf of buyers. “Floor” wholesalers” (“*grossistes de carreau”*) make most of the sales. These wholesalers do not provide delivery services, the buyers directly taking care of the goods[3]. At last, most TWM have a producers’ floor, a space dedicated to direct sale by local and regional farmers.

[2] The « floor » (le « carreau » in French) is the physical location, rented or owned by the sellers and used to exhibit the goods on sale.

[3] Wholesalers « with full service » (‘*grossistes à service complet’*) are another type of wholesalers. These wholesalers act more like logistic platforms and offer a wider range of services, including delivery. Transactions, at distance, are generally organized by contracts and product quality is more standardized. Thus, while the full service wholesalers can choose their location, the activity of “floor wholesalers” cannot be conceived outside a physical market.

Beyond the exchange and marketing functions, TWM are now areas gathering all activities for the distribution and packaging of food products responding to a logic of geographic concentration and pooling of equipment and services (Sirjean, 2015). Thus, firms offering facilities and services, logistics providers in particular, are also located in the TWM areas. The share of these activities is taking more and more weight today. For example, in the Rungis market in 2016, around 40% out of 2.89 million tons of food products supplying the market correspond to receipts from logistics and transit activities (Semmaris, 2016).

Traditionally located in the center of cities, TWM have been pushed outside due to the densification of car traffic and the growing urbanization (Bricas et al., 2017a). Today, TWM are thus most often located on the outskirts of urban centers and near major highways.

2.2 Towards a loss of legitimacy of wholesale markets?

In the 1950s and 1960s, in Western Europe, in the framework of food security policies, the public authorities (national governments in France or Spain or cities in Italy, Germany or Great Britain) set up networks of assembly and terminal wholesale markets to ensure the distribution of fresh food from production to consumption areas (Cadilhon et al., 2003). In France, wholesale markets were assigned a public service mission. In 1953, a decree planned the creation of a network of MIN, *Marchés d'intérêt national,* (Markets of National Interest). Two types of MINs were created: assembly and terminal in consumer areas (e.g. Lyon or Grenoble). These markets were characterized by the definition of a protection perimeter around the markets in which the competing commercial activities are prohibited. The fulfilment of the service public mission is ensured by the participation of the public institutions (State, prefects or local authorities according to the markets) to their management (Cadilhon et al., 2003; Sirjean, 2015). This policy fulfilled a general objective of reorganizing the marketing and the distribution of agricultural and fresh food products at the national level. The aim was to favor free competition, to ensure a greater transparency on markets and prices

(at national level) and lower distribution costs, and to enable the control of products quality and prices (Bernard De Raymond, 2004; Durbiano, 1996; Wackermann, 1977).

The establishment of the MIN network lasted about 20 years (Lauret and Soufflet, 1985). Between 1961 and 1968, about twenty wholesale markets were classified as MIN, the rest of the wholesale markets tending to disappear. According to Wackermann (1977), the TWM number would have decreased by 20-25% between 1945 and 1960 and by 20-30% between 1960 and the mid-1970s. Some markets subsist outside the network of MINs, but remain marginal. Nevertheless, the influence of the MINs seems to decrease gradually since the 1980s and their ability to fulfill their public service mission is questioned. Lauret and Souflet (1985) emphasize the difficulty of controlling, analyzing and disseminating price information. Dugot (1993: 723) asserts that, for some MINs, Toulouse in particular, the term "national interest" "never responded to a reality" because only a marginal part of the regional production was sold on the Toulouse market for local redistribution, most of it being distributed through more "integrated" channels driven either by producers' co-operatives or by supermarket chains. The increasing concentration and power of manufacturers and then large-scale retailers is one of the main causes of loss of influence of the TWM (Durbiano, 1996; Lauret and Soufflet, 1985; Wackermann, 1977). These evolutions have led to the development of direct relationships between producers, manufacturers and retailers and therefore to a significant decrease in the role of wholesale trade in food channels (Gadde, 2012; Michel et al., 2018). Wholesale markets are then often considered outdated and doomed to disappear with time (Dugot, 1993; Durbiano, 1996). The State and local authorities also tend to lose interest in this form of distribution (Sirjean, 2015). In the early 2000s, in the city centers, the lack of maintenance of buildings indicates this disinvestment. The MINs lose their customers (independent restaurant owners and sedentary retailers in particular) who are choosing other supply chains or are struggling themselves.

More recently, the search for more sustainable food systems and the expansion of new networks weakens a little bit more the position and legitimacy of wholesalers and wholesale markets. Bypassing intermediaries between producers and consumers is said to be a way to socially re-embed relationships and to re-allocate power and profits in favor of producers (Bloom and Hinrichs, 2011; Forssell, 2017).

However, in this unfavorable context, MIN's status is evolving and market authorities develop active strategies, at the local and national levels, to position TWM as stakeholders in local and more sustainable food systems.

2.3 Evolution of TWM missions and the search for a new legitimacy

On the legislative side, the public service mission assigned to MINs has evolved and the role of TWM in food systems is expanding (Bernard De Raymond, 2004; Sirjean, 2015). Before 2010, the main function assigned to MINs was the organization and regulation of the markets to ensure economic efficiency of markets. In 2010, a new law gave a more generic definition of MINs and expanded their missions (Sirjean, 2015). They have become "public market management services providing wholesalers and producers with collective management services adapted to the characteristics of certain agricultural and food products. They have local planning, environmental quality improvement, and food security objectives".

At the same time, the distinction between MINs and "generic" TWM is shrinking. The French Federation of TWM (Fédération des marchés de gros de France, FMGF), which replaced the French Federation of MIN (Fédération française des MIN), has expanded the network by integrating private markets. In 2018, the network comprises twenty-four markets including one in Belgium (Brussels), sixteen MINs, and six non-MIN markets. The Federation reaffirms the public service missions of TWM. Its 2016 annual report states that TWM are "places dedicated to the distribution of fresh and non-food food products. Their main objectives are to

bring together multiple operators in a single location in order to foster competition, to participate to the adaptation of prices to supply and demand, to make transactions transparent, to organize logistics and to seek synergies through common services having exceptional quality sourcing and a unique expertise. [...].” This role applies in three main areas: (i) agri-food chains (link between agents, proximity channels serving local production and consumption, promotion of the food diversity); (ii) territories (urban logistics, organization of the urban space and local planning); .and (ii) sustainable development (organization of the flows of goods, collection and treatment of waste, support of transition toward sustainable transport) (Fédération des Marchés de gros de France, 2016, pp. 19–20).

The Federation also developed a proactive strategy of communication, defense and support for the TWM “model” (Fédération des Marchés de gros de France, 2017). This strategy aims at improving their visibility and positioning them as full stakeholders in food systems re-localization. The federation created five working commissions to develop a collective reflection on the common issues of TWM (development of producers floors, role of TWM in regional development, customer relationships or the fight against food waste) (Fédération des Marchés de gros de France, 2015). This strategy is also based on an increased participation to events (conferences, conventions) and national and international trade fairs and exhibitions, to inter-branch organizations, and in national research and development networks (focused on local food policies for instance). The Federation has also signed a number of partnerships with official bodies, professional federations (e.g. with the Union of Catering Industries, union of the Young farmers, national Assembly of Chambers of Agriculture…) or with associations with social commitments (Fédération des Marchés de gros de France, 2016). At last communication actions has also been implemented in association with the other stakeholders of food chains, the independent retailers in particular. In 2016, the federation proposed to the retailers a sticker, to display on the shop window, presenting the slogan "*Creators of*

proximity. I supply locally in quality and freshness from my wholesale market" (Marchand, 2016). This was a means of "valuing local convenience stores and the role they play in maintaining the social link [...]. [it] is also in line with the desire of all players in the trade sector to revitalize city centers." (Besomi, 2017).

All these actions reflect a desire to include wholesale markets as stakeholders of local and sustainable food systems. In parallel with the Federation's proactive strategy, the wholesale markets also developed their own local initiatives. These initiatives reflect a strong desire to regain legitimacy as stakeholders of food systems, to maintain their activity.

3. Legitimacy and re-localization: analysis framework

3.1 Legitimacy of hybrid models in the dynamics of food re-localization

In a context of changing markets and agri-food chains, which is unfavorable, the TWM suffer of a loss of the legitimacy. Lack of legitimacy may affect the performance of organizations and threatens their survival (Michel, 2016; Mitchell et al., 1997). For Deephouse et al. (2017, p. 32), which is based on Suchman (1995), “organizational legitimacy is the perceived appropriateness of an organization to a social system in terms of rules, values, norms, and definitions”. The legitimacy of an organization depends on its degree of "fit" with the normative expectations of a given environment (Suddaby et al., 2017). The success of the strategies implemented by TWM and their federation to give them a new legitimacy as stakeholders in food re-localization depends on their ability to show that their organization, the services offered, the nature of the relationships on the market are appropriate to the values and goals associated with local food systems (LFSs). However, in a context where "cutting out the middleman" sounds like “a mantra” (Bloom and Hinrichs, 2010), as intermediate institutions, TWM are emblematic institutions of a model in contradiction with the one carried by LFSs. The latter, which allow proximate relations, whether spatial or relational, “built on

cooperation, interdependence, shared interests, and civic engagement" are considered as 'alternatives' to the 'conventional' model "where relations between producers and consumers are distant, anonymous, and motivated by profits" (Bowen and Mutersbaugh, 2014, pp. 204–205). Direct-marketing, re-connection, and shared goals and values legitimate LFSs as alternative models (Albrecht and Smithers, 2018; Milestad et al., 2010; Mount, 2012). TWM that take consumers away from producers and may marginalize the former in value chains (Bernard De Raymond, 2004) seem like illegitimate organizations "that should be radically reformed or cease to exist" (Deephouse et al., 2017, p. 33).

Nevertheless, a number of authors contest this simple (even simplistic) opposition between conventional and alternative models (Holloway et al., 2007; Le Velly, 2017; Sonnino and Marsden, 2006). In addition to the risk of 'defensive localism' (Winter, 2003), Mount (2012) emphasizes that it prevents from taking into account the diversity of forms of LFSs. Praly *et alii* (2014), highlight that these approaches exclude initiatives involving more than one intermediary, despite the possible role of these intermediaries in creating a form of proximity. "Hybrid" forms should be considered. For Bloom and Hinrichs (2011, p. 145), "hybridity recognizes that, in their attempts to reassert control over the food system, producers and consumers may draw from some resources and practices stylized as "conventional" and others as "alternative"". "Arrangements where conventional produce distributors handle local food [can be viewed] as "hybrid" food value chains, since they include both local and global resources, and combine conventional food system infrastructure with the more alternative goal of building local food systems" (Bloom and Hinrichs, 2011, p. 144).

This approach leads to qualify the illegitimacy of TWM as stakeholders of LFS. They may be considered as stakeholders of hybrid food value chains. Their legitimacy thus depends on their ability to "establish and maintain an alternative identity" (Mount, 2012, p. 112). TWM

must provide services, an environment and infrastructures to participate in the development of food systems appropriate to the standards and values associated with re-localization.

3.2 Characteristics of local food systems

Based on Forssell and Lankoski (2015), alternativeness of LFSs can be associated to three types of characteristics : (1) background characteristics, (2) the core characteristics, and (3) outcome characteristics. We assume that legitimacy of the TWM as players of food re-localization depends on the adequacy between their organization, the initiatives they carry and these characteristics.

3.2.1 Background characteristics

Background characteristics refer to the participants' “non-conventional” moral values, goals and logics (Forssell and Lankoski, 2015). The notion of commitment of stakeholders in favor of more sustainable production, distribution and consumption models is central (Jarosz, 2008; Kirwan, 2004). The alternativeness LFS is based on the willingness and commitment of stakeholders to implement practices that may correct the shortcomings of the conventional model.

3.2.2 Core characteristics

Core characteristics are associated with products, production-manufacturing-distribution processes and the governance of food systems and relationships within these systems. Forssell and Lankoski (2015) distinguish three dimensions of core characteristics. First, they relate to “quality turn” of food systems (Goodman, 2004; Maye and Kirwan, 2010; Watts et al., 2005). This captures the growing interest and expectations in terms of product quality (safety, organoleptic…) and production processes (environmental sustainability, use of traditional knowledge and artisanal production scales, local-embeddedness).

Second, the potential of the LFSs to affect the agri-food system relies on their ability to "reconnect" participants (Albrecht and Smithers, 2018). This means reducing spatial distance, diminishing the number of intermediaries in the distribution channels (Praly et al., 2014) as well as reducing the "informational distance" on products and production processes (Clark and Inwood 2016, Marsden, Banks and Bristow 2000, Renting and Marsden and Banks 2003).

At last, the nature of governance of relationships within food systems is also central. It refers to the nature of the participants involved, the legal status of organizations, and the distribution of power, sharing of values and resources, and decision-making (Roep and Wiskerke, 2012; Van Der Ploeg, 2015). The alternativeness is founded on the establishment of governance arrangements that allow a better distribution of power and resources within food systems (Forssell and Lankoski, 2015).

3.2.3 Outcome characteristics

Outcome characteristics refer to the nature of relationships and, in particular, to the social embeddedness of the economic relationships (Chiffoleau, 2009; Hinrichs, 2000; Murdoch, 2000; Sage, 2003). The alternativeness of LFSs thus rests on the idea that greater proximity between actors allows for stronger interpersonal relationships that facilitate the exchange of ideas and the construction of shared values and goals (Mount, 2012).

4. Terminal wholesale markets as “hybrid organizations”

The way TWM operate, as well as their positioning and the strategies implemented at both national and local levels, lead to view TWM as hybrid “organizations” as defined by Bloom and Hinrichs (2011).

On the one hand, wholesale markets are “embedded” in the conventional model. Despite the development of producers’ floors, they are intermediary structures. An important part of the exchanges are part of long channels, at national and international scales, and which tend to

marginalize the producers and do not allow a fair distribution of the value in food chains (Aubry and Kebir, 2013; Bernard De Raymond, 2004; Perrin and Soulard, 2014). Their commercial marketing function requires the presence of a wide range of products (Sirjean, 2015) whose characteristics (origin and production conditions) may not fulfill the "norms" of alternative models.

On the other hand, the functions performed by TWM and the specificities of their workings may enable them to fulfil some characteristics close to characteristics on which LFSs alternativeness is based.

First, TWM constitute strategic logistics hubs, particularly for city provisioning (Bricas et al., 2017b; Morganti and Gonzalez-Feliu, 2015; Sirjean, 2015). Their privileged locations, the existing infrastructures as well as the unicity of site and management facilitate pooling. TWM are thus "urban logistics areas" that can play a dual role (Sirjean, 2015). Downstream, TWM may participate to the development of more sustainable distribution channels in environmental (reduction of car traffic, pooling of resources for investment in less polluting vehicles) and economic terms (logistics costs reduction, improved accessibility to certain markets for local producers and to local products for retailers and restaurateurs). Upstream, as supply concentration areas, TWM have infrastructures that make it possible to envisage the building of hubs to aggregate, even process, and distribute the regional food supply to urban markets (Montpellier Méditerranée Métropole, 2017; Perrin and Soulard, 2014). They can thus potentially be viewed as interface places between rural and agricultural spaces, and urban spaces (Bricas et al., 2017b) and be considered as tools for structuring a local food supply while allowing the distribution of higher volumes than just short food supply chains.

Second, TWM also fulfill commercial functions (Sirjean, 2015). Marketing based on a physical presentation of the goods and negotiations by mutual agreement can foster the development of interpersonal relationships and social embeddedness of economic

relationships. Wackermann (1977) highlights "the role that physical markets can and must play in a very “technology-dominated” society in search of contacts between producers and consumers” (p.11). Curchod (2010) analyses the pricing process in Rungis market. He shows the importance of the cooperative dimension in negotiations based on long-term relationships between wholesalers and buyers (customer service, security and regularity of supply, human relationship ...). He also shows the importance for wholesalers to establish long-term relationships and trust with suppliers. “There is a shared interest in selling the goods, so selling at a price low enough to maintain a supply flow- storing in large quantities would break that pattern - and selling at a price high enough to maintain trust upstream, beyond the only consideration of the wholesaler’s margin” (p.215).

Third, the organization of TWM also gives them the ability to respond to less conventional distribution channels. Bernard de Raymond (2010, p. 9) points out that TWM are dependent of the interpersonal networks and the skills of the operators. They thus are ill-suited for supplying mass consumption markets (regular quantities and prices, standardized quality). However, they present “a "structural homology" with the model of the small retailer specialized in fruits and vegetables, which segments its offer according to expert criteria”. Wholesale markets thus contribute to maintaining traditional independent retailers, wholesalers still being key players in their provisioning (Néfussi and Vicaire, 2008), especially for non-sedentary traders. Moreover, thanks to the definition of preservation perimeters, the MINs have become "spaces for the protection of traditional commerce" (Bernard De Raymond, 2004). Independent retailers and restaurateurs may play a part in sustainable local food systems (Navarro, 2015). They participate to foster local development, in urban areas in particular (see Navarro (2015) on open-air markets and non-sedentary traders) and fulfill an important social function (Clarke and Banga, 2010; Navarro, 2017).

They can also participate in the maintenance and enhancement of traditional productions (Chabrat-Michel, 2015; Delfosse, 2017, 2012).

At last, TWM are institutions that may go against the trend towards the standardization of food products and the disappearance of diversity. For Bernard de Raymond (2004, p. 47), their ability to offer a differentiated and diversified products make them "market segmentation spaces". TWM establish real "economics of variability", "that is, a market organization aiming at optimizing the management of differences, discrepancies (in quality or price)."

Then TWM can be viewed as specific organizations, breaking away to conventional distribution channels because of their operation but associated to them because of their intermediation function. This article aims at better understanding this hybrid nature of wholesale markets, through the analysis of the strategies of two wholesale markets in the Auvergne-Rhône-Alpes region.

5. The cases of the Lyon Corbas TWM and the Grenoble MIN

5.1 Material and methods

The analysis uses two types of data. First, a review of the professional and institutional bibliography allows to follow-up news related to TWM, projects and actions implemented in the network of TWM (newsletters of the national federation in particular) and in the studied markets. In particular, besides the Internet sites, the Facebook pages have been followed-up. In addition to a "day-to-day" monitoring of market news, this watch helps to identify the nature of the news (for example the type of information given in communication on products) and the communication choices made through the themes of "shared posts”. These choices can partly reveal the way the market authorities are positioning themselves in certain fields of food (solidarity, education, gastronomy ...).

Second, non-directive interviews complete the bibliographic data. They were conducted in the framework of two research projects between 2016 and 2018. In March 2017, the General Secretary of the Federation of TWM was interviewed. Several interviews were conducted with the President of the Lyon Corbas market (also wholesaler and president of the National Union of Fruit and Vegetables Wholesalers (UNCGFL)), and the director of the Grenoble MIN (a former wholesaler). They interviewed about the market positioning in the food chains, the strategies adopted and the actions implemented as well as the integration into networks and the different forms of partnerships established.

5.2 Markets presentation

5.2.1 The TWM of Lyon Corbas

This market opened in January 2009. It was built following the closure of the former MIN. Lyon-Corbas TWM is a private market. An association of wholesalers was created to manage it and wholesalers and producers owns their space. This market is specialized in fruits and vegetables trade. It brings together, 23 wholesalers (including 2 selling products and services for retailers) and 61 producers. The total turnover amounts approximately 316 000 k € per year. Lyon-Corbas is a regional market. It serves more than 2,000 customers in more than 49 departments, but most of them are located in the Auvergne-Rhône-Alpes region (Gautier, 2017a). With a surface area of 12 ha (32,600 m² of built area of which 2,600 m² are reserved for producers' floor), around 300,000 tons of fruits and vegetables sold per year, Lyon-Corbas is, after Rungis, the biggest French TWM for fresh fruits and vegetables.

As shown in Figure 3, the market was built near the outskirts of the Lyon metropolis near major highways. In addition, it is located at the heart of the agro-food cluster of Corbas, an activity area that brings together several agribusiness and logistics companies.

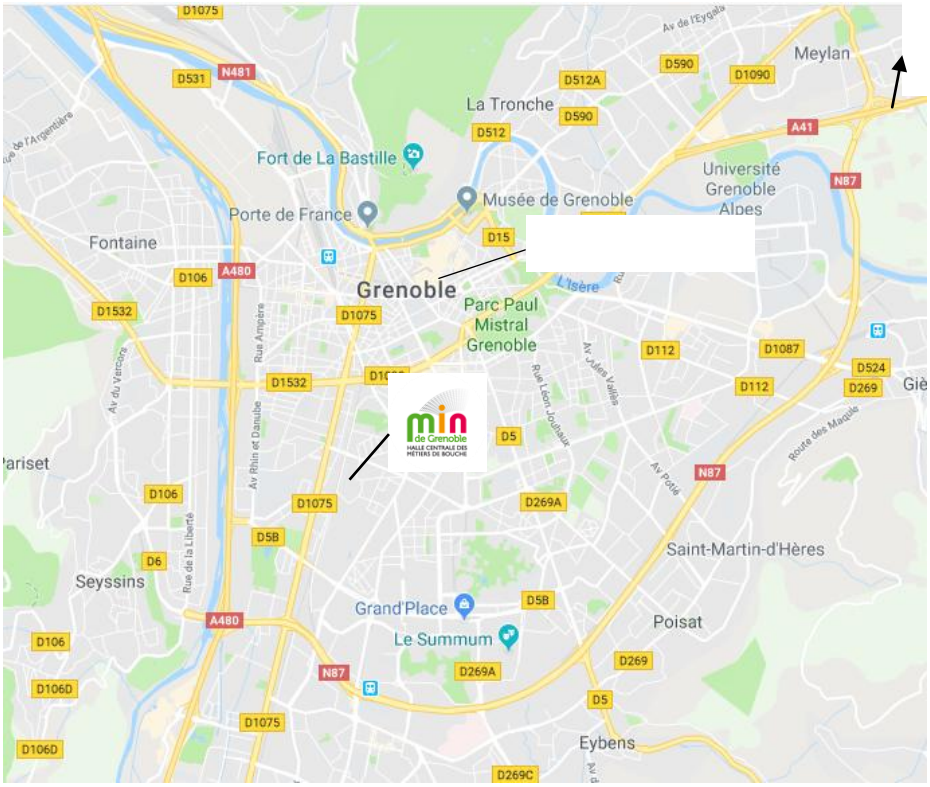
Figure 3 - Location of the wholesale market of Lyon-Corbas (source: (Lyon-Corbas wholesale market, 2018)

5.2.2 Grenoble MIN

This MIN opened on October 22, 1963. The management authority was set up in 1960 with the aim of moving the wholesale market, originally located in the city center, more in the periphery and in a location near the highways (cf figure 4). In 2003, the MIN moved to a status of semi-public company (Sominalp), in order to be able to borrow to finance the rehabilitation and upgrading of infrastructure. The ambition was to make MIN a logistics platform for the Grenoble urban district (Cattiaux, 2004). Grenoble is the smallest MIN of France Occupying a surface of 5 ha of which 1,500 m² are built. After a sharp activity slowdown and a significant decrease in the number of wholesalers, this market is experiencing, in recent years, a period of growth with the arrival of new players. In 2017, 13 wholesalers of various specialties (fruits and vegetables, meats, confectionery, bakery products, flowers, wines, dairy products, supplies for traders and restaurant owners), 2 fruits and vegetables full service wholesalers, a logistics company, a group of organic producers and processors and about thirty local producers and processors are on the market (Berger, 2017;

Gautier, 2017b; MIN de Grenoble, 2018). The total turnover in 2016 amounts to 60.7 million euros (including € 30,000 in fruit and vegetables) for 45,000 tons of sold products (including 24,000 in fruits and vegetables) for around 145 buyers (Berger, 2017; Fédération des Marchés de gros de France, 2016) (Berger, 2017, Federation of Wholesale Markets of France, 2016). Having local orientation, the Grenoble MIN serves essentially the Grenoble urban district and the Isère and Savoy ski resorts.

Figure 4 - Geographical situation of the MIN of Grenoble (source: Google Maps, 2018)



5.3 Differentiated positioning of the TWM of Lyon-Corbas and Grenoble MIN

5.3.1 "Open" markets

The corporate communication of both markets shows a strong involvement in a variety of events that place them as full-fledged stakeholders of food systems. A notable orientation is the opening to consumers of these places normally reserved for professionals. In Lyon a strong emphasis is placed on visits organized for different audiences with or without links with the agri-food sector (school, professional associations, consumers, foreign delegations).

In Grenoble, the organization of events open to the public is preferred (e.g. the Isère Food Festival organized as part of the national gastronomy festival). In addition to communicate on the wholesale jobs, these initiatives aim at contributing to a better knowledge of products and distribution channels by consumers. A number of events that these markets host or in which they participate, highlight themes that can be associated with "sustainable" food such as gastronomy, seasonal products or health (e.g. partnerships with chefs, organization of culinary workshops for schoolchildren, organization of competitions around seasonal products for high school students hoteliers ...).

The two markets are also engaging in initiatives that position them as stakeholders of food chains and, in particular, as promoters of the independent retailing and catering. This commitment includes the implementation, at their local level, of initiatives and partnerships supported by the national federation of TWM. They are also involved in training courses or events promoting professional expertises (specific training course for produce dealers, hosting the regional final of the competition for young talents of market gardening in Lyon, cooking contest for students from technical high schools in Grenoble). Moreover, the sharing of news relating to the buyers' different professions (produce dealer, butcher, and restaurant owners) also marks a form of commitment in the promotion of these sectors.

Beyond their promotion, the greater openness of markets may be a way of re-creating a form of proximity and mutual acquaintance between the different players of the food systems.

5.3.2 The MIN of Grenoble, a "super market" for the Grenoble urban district

The current strategy of the Grenoble MIN follows the main orientations announced in the 2003 "recovery plan" (Cattiaux, 2004). This plan aimed at making it a logistics hub for the urban district. This strategy not only responded to sustainable development purposes but also for the sake of ensuring the profitability of the market, whose activity has slowed down

considerably. In this context, several growth levers have been identified, including the welcoming of new players ("Parisian wholesalers" in particular) to increase the flows and the development of the peri-urban agriculture. Since then, the market has actually positioned itself as a player in urban logistics. In February 2016, after several years of work, a shared delivery service was set up to supply downtown customers. Moreover, the MIN is piloting the urban distribution center (CDU) for the fresh sector, which is part of the Grenoble-Alpes-Métropole “Low Emission Zone” strategy (Grenoble Alpes métropole, 2018). This strategy responds to environmental (reduction of nuisances related to road traffic), economic (logistic costs reduction) and planning issues. Moreover,

At the same time, MIN is pursuing its development strategy based on a diversification of operators and activities. The Grenoble market is developing with the incoming of national wholesalers with both French and imported offers, to ensure the widest possible offer, in terms of quantities and product ranges. Its development strategy also relies on the incoming of local producers and processors (Gautier, 2017b) (e.g. a regional group of organic producers and processors in 2017, a regional co-operative offering fresh and fresh-cut fruits and vegetables or even a local coffee roaster, an e-grocer selling products in bulk delivered by bike). More recently, the MIN is part of a departmental agri-food cluster[4] aiming at developing local food chains creating profits for farmers. Developing local supply in order to modernize and develop the MIN is a part of this strategy. In this context, the creation of a kind of “farmers hub” to group local agricultural products to supply restaurants and retailers in the Grenoble urban district is in reflection. The MIN also develops a range of services for customers. An electrified car park to refill trucks in cold for non-sedentary traders was put into service in early 2018 Moreover the building of cold storage facilities in the market area is planned.

[4] This cluster involves public authorities (Region, Department, City) and professional chambers. A collective local brand for agricultural and food products has been created

The Grenoble MIN is involved in several partnerships and projects with associations or enterprises for social integration that respond to environmental and social sustainability goals and values. These projects consist in salvaging edible but non-salable products to reduce food waste. These products are sold at lower prices or they are processed in processing units that employ people in social of professional reintegration and sold in various outlets (solidarity groceries or “conventional” stores and restaurants) (Berger, 2015; MIN de Grenoble, 2018).

5.3.3 The Lyon-Corbas TWM, a regional strategy focused on quality and certification

This market has a very different positioning, characterized by a wider geographical anchorage. This market is intended more to supply a region than a specific urban district. Moreover, this market specialized in fruits and vegetables and located in a region of production, is characterized by the importance of its producers’ floor (61 producers against 55 in Rungis for example). In addition, 183 producers, who deliver themselves their production to wholesalers, provide the regional supply. The regional offer represents 14% of the volumes sold (the offer of French origin represents 45%), 4% of which are sold on the floor by rather small farmers. The functioning and attractiveness of the market depends on the complementarity of the different offers to meet the diverse needs of buyers. Collective communication on products is targeted, with some seasonal products being punctually highlighted in publications (Facebook or newsletter). The products highlighted can be local products or not but a section presenting a specific product is reserved to the producers’ floor in the market’s newsletter. However, even if the origin of the products is mentioned, above all criteria correspond to sectoral quality procedures are highlighted. Indeed, the market’s communication strongly emphasizes the commitment of certain wholesalers (15 in 2017 (Gautier, 2017a)) in procedures of quality certification specific to fruits and vegetables wholesaling sector (Fel'engagement, Fel'Partenariat and Fel Excellence). These three

complementary procedures guaranty quality control, promote the wholesalers' expertise and their commitment to their suppliers, customers, and employees.

Beyond these individual initiatives, the market commits to retailers through a strong partnership with market traders in the urban district. This strategy is reflected in the creation of a label launched in March 2017, bringing together Lyon-Corbas wholesalers and retailers to "boost the retail trade and boost its attractiveness to consumers" (Marché de gros Lyon-Corbas, 2017). The label "Le primeur de mes envies - La signature fraîcheur" values this approach, which aims to emphasize the expertise of retailers, and develop the attractiveness of open-air markets. In addition, this label also seems to engage in a process of promoting regional productions by associating with the collective brand created by the AURA Region ("la region du goût").

Considering the infrastructures, the newly built market was designed to meet the requirements of fruits and vegetables logistics and to facilitate customers' access and management of goods. In addition, building cold storage facilities for market's customers is envisaged (Gautier, 2017a).

The Lyon-Corbas market is part of regional initiatives led by the local development stakeholders but these links seem less strong than those established by the Grenoble market. In 2017, it hosted the first edition of Planète Appro, a biennial trade show, promoted and organized by the Rhône Chamber of Agriculture, whose main objective is to federate the various actors of local food value chains: producers, elected representatives and trade professionals (Gautier, 2016; Marché de gros Lyon-Corbas, 2017).

On the environmental front, in 2015 the market set up a waste sorting center which makes it possible to recover 81% of the waste of wholesalers and customers of the market (Gautier, 2017a). In addition, a proactive policy for waste reduction has been established. Since the

opening of the new market, the wholesalers finance the treatment of their waste, which allowed an important reduction of waste (Berthe and Navarro, 2012). In a more anecdotic way, the market also communicates on the installation of hives, within the market enclosure, financed by wholesalers.

In 2013, an experiment between the national association of solidarity groceries and the market was launched. Voluntary wholesalers supplied associations with ready-to-eat goods and products to sort. Nevertheless, this partnership does not seem to have persisted over time.

5.3.4 Different positioning for different markets

The comparison of the two markets shows different trajectories and positioning in the food re-localization dynamics.

The Grenoble MIN is locally embedded and seems to be on a trajectory that places it as a main stakeholder in the local food system (in terms of values displayed and commitment of the market authorities as well as in terms of products and services offer matching the expectations in terms of quality and localization). The integration of the MIN in various devices intended to relocate food seems to mark the recognition, by the local players, of its legitimacy as a stakeholder in this dynamic.

The regional positioning and specialization of the Lyon-Corbas market make it a less localized market. In particular, it seems poorly involved in food re-localization initiatives supported by local stakeholders, particularly those in the Lyon metropolitan area.

Several factors can explain these different positioning. First, the history of markets can explain these differences. The Grenoble market, whose activity had slowed sharply in the late 1990s, had to implement a very active recovery strategy through the attraction of new operators and the diversification of activities to ensure its survival. Lyon-Corbas has, despite some difficulties, an activity which is maintained and which does not require strong

reorientation. Second, regarding local embeddedness, the small size of the Grenoble urban district seems to facilitate the networking and integration of the TWM in a local system. At last, MIN versus private status can also explain these differences in terms of local roots and in food re-localization initiatives that are often carried by public authorities.

To conclude, Grenoble TWM, more than Lyon-Corbas, seems to be in “hybridization trajectory” in the sense of Bloom and Hinrichs (2011).

6. Conclusion and Research Perspectives

French TWM claim a multiplicity of missions (Blézat Consulting, 2012), "classic" distribution functions (Fernie et al., 2015), but also missions of market regulation, local value chains organization, and local development. Nevertheless, the few recent work on the food re-localization considering TWM focus on their logistics function (Morganti and Gonzalez-Feliu, 2015; Sirjean, 2015) or their role in the implementation of local food governance (Perrin and Soulard, 2014).

This research is a first step in the analysis of the positioning of TWM in France in food re-localization movement. This context constitutes a "fertile ground" for questioning the organization of the supply of certain areas (Dugot, 2016) (e.g. cities (Bognon, 2014)), and rethinking the place and nature of intermediaries and intermediation in the food supply chain (Filser, 2015). Many issues are raised related to the ‘scaling-up’ of LFSs (Berti and Mulligan, 2016; Friedmann, 2007; Hinrichs, 2003; Mount, 2012). The underlying question is how integrating some players who can remain marginalized and develop the scale of LFSs, while not losing their “alternativeness’ and avoid their "conventionalization" (Aggestam et al., 2017; Beckie et al., 2012; Cleveland et al., 2014; Johnson et al., 2016; Le Velly et al., 2016; Nost, 2014).

Several recent works have tried to test the alternativeness of “hybrid” arrangements, integrating a form of intermediation between producers and consumers (Albrecht and Smithers, 2018; Bloom and Hinrichs, 2011; Clark and Inwood, 2016; Johnson et al., 2016; Mount and Smithers, 2014). The investigations we conducted to date does not allow to address such a question. This issue is a research perspective for our work. It requires to collect complementary data from the various players involved in the TWM distribution channels (producers,wholesalers, retailers) to assess their perception and the nature of the governance of relationships established on TWM.

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In France, the Marchés d'intérêt national (Markets of National Interest), MIN, have been created in order to reorganize national distribution of fresh produce (Durbiano, 1996). This special status assigns a public service mission to wholesale markets and protects the intermediation function by defining a protection perimeter (Cadilhon et al., 2003). From 1961 to 1968, around twenty markets were classified as MINs