

Master Thesis Rural Development Sociology

The ethnic food market in the Netherlands



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Abstract

This thesis explored the dynamics of the ethnic food market in the Netherlands. This phenomena is rather new and hardly studied. This thesis makes use of insights from the globalization of food and globalization of migrant labor to formulate an agenda for empirical investigation. One of the dimensions of food that is marginally covered in the globalization of food studies is the role of culture and changing food habits of people. The cultural dimension presents itself as an interesting angle to explore food consumed by migrants which has led to the formation of the so-called 'ethnic' food market.

The leading perspective is that markets are ordered in many ways and that a variety of stakeholders operate in the making of markets. These markets are understood as main stream markets, ethnic food, niche markets are on reflecting in my view an understanding of a logical and nicely ordered market along different networks that link particular consumers through the market agency to producers all over the world. The data I collected in a neighborhood in Utrecht actually challenges this view. My findings point at markets being heterogeneously organized, at time messy on the basis of which one can question basic assumptions made by experts and development agencies. There not one pattern, and there may be not even one order but many. The ordering is not uni-dimensional but multidimensional, reflecting in turn the multiple realities of food.

Chapter one: Introduction

The Dutch population demographics have changed substantially since the influx of foreign workers during the sixties. Because of immigration, family formation, and family reunion of migrants laborers the Dutch society gradually slowly has become multi cultural. The Central Bureau of Statistics (CBS) provides data for 2007 indicating that on average 31.4% of the inhabitants of the four largest cities in the Netherlands (Amsterdam, Rotterdam, the Hague and Utrecht) have foreign ancestry. This means that they themselves or at least one of their parents was born abroad (CBS, 2010). This immigration and the consequential increase of immigrants in the Netherlands has stimulated new research themes in the field of social sciences. Quite a lot of research has been done on immigrants and their culture, religion and political preferences. In contrast not much research has been done on their demand for traditional food products on the Dutch food market. Immigrants are said to have a different food culture and eat different food items and dishes. It is assumed that ethnic food represents a cultural value to its consumers and that strengthens feelings of nostalgia and identity. This in turn has stimulated the demand for so called 'ethnic food products' originating from the country of origin from the migrants. In this thesis 'ethnic food products' is defined as food products that are characteristic of a specific area or culture (Van der Schans *et al.*, 2009). The Dutch ethnic food market currently has a turnover of 3 billion euro and is predicted to increase substantially over the next few years.

An interesting dimension of ethnic food is that globalization processes facilitated the import of food rather easy and to occur fast. The demand for ethnic food combined with globalization has transformed the Dutch food market and economy quite drastically. There is not only an increased interest in foreign food products – visible when one looks around in supermarkets and in stores in sub-urbs and neighborhoods, dishes made in Dutch homes increasingly are inspired by global food products. Fresh vegetables are available at all times, independently from the growing season. A large part of the food market now consists of import and production of foreign, ethnic products, while before only traditional Dutch or Western food products were imported and produced. There are now numerous Dutch entrepreneurs who switched to the production and importation of foreign products in order to be able to establish themselves within the dynamic global food market.

This research has been done in collaboration with the Koninklijk Instituut voor de Tropen in Amsterdam (KIT; Royal Tropical Institute). The objective of the study is to analyze the ethnic

food market and to find out how it is organized. The initial idea of KIT was that ethnic food markets represent different and independently operating marketing and production networks. The intention was to explore the possibilities for a pro-poor development project and strategy linking consumers and producers in the Netherlands and the countries of origin in separate food networks. In this way consumers of ethnic food could support producers of ethnic food. The marketing could be improved and on the production side production could be improved by inserting new knowledge and experience..

Beside literature and methodological considerations, the assumption made by KIT on how the ethnic food market is organized have played a key role in asking questions about the nature of the market but also its structuring and interpreting the data. KIT's starting points in short are:

- 1) Ethnic food shopkeepers in the Netherlands import food products directly from producers in their country of origin. The reasons could be the low transport costs, being able to order low quantities, having no alternative for buying these products, to be able to trust the person they trade with or to support these producers financially.
- 2) The main reason for immigrants in the Netherlands to consume traditional food, bought from ethnic food shops, is because this food represents nostalgic values.
- 3) The costumers of ethnic food shops in the Netherlands are (mainly) first, second and third generation migrants

The data are derived from a field study done in a multicultural suburb in Utrecht. The research made use of semi-structured interviews with immigrant retailers and their customers to explore the origin of their products is, who the shop's costumers are, why people buy food products in these ethnic shops in particular, and why consumers buy ethnic food products. Participant observation provide substantial extra information that was useful for the analyses.

The thesis continues as follows. Chapter 2 provides a framework for the study. It deals with a short overview of relevant food studies as well on migration. Chapter 3 focuses on the neighborhood where this study took place. The last chapter aims to synthesis the data and arrive at a conclusion. It will also reflect on the research process.

Chapter two: Studying food

This chapter presents the literature study of this research. It presents an overview of relevant food studies and migration studies with a focus on food market chains. The chapter consists out five different themes. It starts with the description of the social meaning of food, than it presents the relevant fields of Food studies, the concept of niche markets, relevant migration themes and the growing demand for ethnic food products.

2.1. Food and the social meaning

Simmel (cited in Appadurai, 1986) saw every good embodies an economic value, which is created by politics. According to him this value is generated by the exchange of sacrifices. One's desire for an object is fulfilled by the sacrifice of some other object, which is the focus of the desire of another. Since two decades ago scientists have a new perspective on the circulation of commodities in social life. Besides the economic value, commodities embody a social value as well. (Appadurai 1986) According to Appadurai commodities circulate in different regimes of value in space and time. They circulate in specific cultural and historical milieus. A famous example of economic objects circling in cultural milieus is the gift. (Mauss 1983, cited in Appadurai 1986) The gift has an economic and a social value. The economic value is the price of the object, the social value the relationship between giver and receiver. A gift creates a social relationship and expectations. Besides gifts, also food embodies a social meaning. Nowadays, we do not eat merely to gain nutrients anymore. Food have meaning for us, it has a symbolic load. (Long & Villareal 2008). Long & Villareal (2008) describe the trajectory of maize from Mexico to the United States. They show how the uses and meanings of specific products are continuously reassembled and transformed within the livelihoods and social networks of people living in a transnational world. Commoditization processes take shape through the actions of diverse sets of interlinked, socially-situated actors, and are composed of specific constellations of interest, values and resources. Actors give objects a meaning and a value. According Kopytoff (1986, cited in Long & Villareal 2008) and Appadurai (1986) goods have biographies composed of diverse sets of circumstances, wherein at some points or in some arenas they are accorded the status of commodities. Because the value of a good depends on the actor's value interpretation of the social significance of a good, every good can become commercialized, for example maize husk (Long & Villareal, 2008). Maize husk never had an exchange value until international buyers value the product because the dolls made out of the husk are made by peasant artisans. The

process of commercialization of maize products changed the lives of the villagers in Mexico. The increasing demand led to large production of the product and a large amount of export. Maize, which was a traditional product, is now a transmitter of modernity.

A second example of such a product is the chain of the tamales (wraps made from maize) (Long & Villareal, 2008). Tamales are a typical Mexican dish, made basically from maize. Since a large number of Mexicans migrated to the United States, the tamales became valuable. After a long chain of producing, cutting, picking and packing, the maize for the tamales arrives in the United States. Nowadays, tamales are not a typical Mexican dish anymore what is eaten at special occasions. Also Americans eat the product, but they changed the taste by adding spices and sauces. The original meaning of the tamales changed over time and has formed new social identities.

These ethnic food products carry with them specific meanings and values associated with the migrants' global life-world. In reverse, the flow of migrant-destined goods and messages help keep migrants in touch and for some they provide a strong anchor, the quality aspect of migrants. This differentiated global space provides a critical field for defining or crystallizing new notions of community and belongingness that are now emerging within localities in many parts of the world. Ethnic food products carry a specific quality value for migrants.

Beside Long & Villareal, also Lind & Barham (2004) wrote about cultural and symbolic discourses regarding to globalization and food. They tried to construct a bridge between the available political-economic discourses of Bonanno et al. (1994), McMichael (1991, cited in Lind & Barham 2004) and Friedmann (1999, cited in Lind & Barham 2004) and the cultural discourses regarding to food. In their article about the social life of the tortilla, they developed a conceptual framework for understanding interconnectedness by examining the relationship between commodities and our discourse, practices, and assumption about food.

To conclude: food needs to be studied and explored in the context of the evolving network of social relationships. Food derives its meaning and value from the set of social relationship in which it is embedded. These relationships not only are to be understood as cultural and social relations. Food like all other commodities have biographies (Appadurai, 1986) and these biographies are composed and constituted by process of localization and what happens in the immediate vicinity of where people live and food is produced but also by world-wide processes of mobility of food and people, that is the globalization of food and labour migration.

2.2. Food and globalization: an overview of studies

The last two decades the relation between food and globalization had been studied by sociologists, like Bonanno (1994), Goodman & Watts (1997) and McMichael (1994, 2009). Although these authors formulated new theories about the globalization of food, they largely ignored the importance of cultural aspects of globalization.

The study of the relationship between food and globalization is relatively new to the field of sociology and anthropology. Although earlier anthropologists focused on how food may reinforce and create distinct worlds, Mintz (1985, cited in Phillips 2006) brought a turning point by offering an unique analytical framework for exploring the nexus of food and globalization. Mintz' task was to develop a cultural, economic, and social history of sugar which revealed the complex way in which sugar production was connected to the development and organization of slavery and capitalist expansion. He argued that the social as well as the economic importance of tea and sugar in eighteenth century Great Britain shaped British colonial policy, not the other way around. The notion that consumption could drive change would later gain favor in theories of the role of the "new consumer" in the construction and persistence of global commodity chains.

Since the publication of Mintz the focus of sociologists on food has changed. Phillips (2006) outlined an overview of the sociological fields of study according to food and globalization. She outlines two different approaches of food and globalization. The first approach is how food has been mobilized as a product in global production and trade systems and governed through global institutions. The second approach is how the idea of globalization has been nourished through food, particularly with the mobility of people and ideas about cuisine and nutrition. The first approach distinguishes three analytical paths to understand projects of globalization.

The first analytical path is the international circulation of food products as commodities, studied by Bonanno (1994), Goodman & Watts (1997) and McMichael (1994, 2009). These scientists began to focus on the expansion of commodity relations beyond national borders. In this field of study transformation became a new era in the global regulation of food. They concluded the production systems became more flexible and corporations were increasingly searching for higher profits in new territories. Murray (2001, cited in Phillips 2006) mentioned that globalization of the food market comes with several costs, like the destruction of the domestic food baser, the loss of plant diversity through monoculture and increased food

insecurities for rural populations. These disadvantages of a global food market made that countertendencies arose that came up with alternative approaches to describe the consequences in a cultural way.

These alternative approaches emphasize varied cultural and historical trajectories and the importance of networks and local/actor agencies rather than structures in the globalization of specific commodities. Two examples of these approaches are Arce's (1993, cited in Phillips 2006) investigation of the uneven local responses to global demands for fresh fruit and vegetables. He saw in South-America that new globalization processes may play a role in reproducing distinct rural regions. Another example of an alternative approach is that of Appadurai (1986). He noted that commodities are not just products flowing through economic channels, they have social lives. Commodities cannot be understood outside the networks of meaning and power in which they circulated. These new approaches challenged the idea of globalization as a predominantly economic, singular process.

The second analytical path is the study of the transnational expansion of food-based corporations. Here, several anthropologists approached the field of food and globalization from the food-related transnational corporations as its starting point. (Heffernan & Constance, 1994, cited in Phillips 2006) The food-related transnational corporations, like McDonalds, make big investments in the food industry and control the way food is grown, processed and distributed. A lot of literature is available on how the corporations searching for new territories for cheaper labor and new markets. How food is globally traded and marketed can also be highly variable and culturally framed. Arce (2000, cited in Phillips 2006) for example wrote about it is essential to know the other person in the food chain very well otherwise you lack the element of trust for trade negotiations. Besides Arce also Applebaum (2004, cited in Phillips 2006) indicated how reference to cultural contexts is central to the success of food-related transnational corporations. These studies show us that corporate power is not a given but a product of whole series of actors, like laborers, growers, traders, marketers, investors, advisors and grocers.

An important debate in studies of the impact of food-related corporations on food consumption focuses on the cultural impact of the global outreach of the transnational corporations. Ritzer (1993, cited in Phillips 2006) described the forms of cultural imperialism of chains like McDonalds, others challenge this position by analytically placing consumption in its cultural context. Watson (1997, cited in Phillips 2006) investigated the localization

practices of food-related corporations by examining the changing eating patterns and taste preferences, Lozada (2000, cited in Phillips 2006) argued corporation's success is related to its ability to become local and several other anthropologists write about negative effects on nutrition and local diets. Weismantel (1988, 1999, cited in Phillips 2006) outlined the negative consequences (like obesity) of changing food habits by talking about bitter gifts of the developed West to the developing South.

Phillips' third analytical path to the study of the globalization of food considers how international organizations and institutions may mobilize and govern food within and beyond nation-states. Studies have focused on how agricultural production has been shaped by multilateral financial aid and lending institutions as the World Bank, International Monetary Fund and World Trade Organization. According to Van der Ploeg (2010) these powerful institutions restructure industry, large trading companies and supermarket chains into food empires, which increasingly exert a monopolistic power over the entire food chain. This, in combination with the industrialization of agriculture and the emergence of the world market as the ordering principle for agricultural production and marketing created a food regime that is deeply affecting the nature of farming, the ecosystems on which farming is grounded and the quality and distribution of food. He says it is difficult for farmers to sell food products outside this circuit of food empires. (like for example Nestle and Unilever). Food empires control the markets and the global food supply chain, but they ignore the social and economic consequences of these standardizing agricultural practices. The costs of this ignorance are high for producers in developing countries. To help the producers in developing countries, trade agreements beyond the empires have to be established. An example of such an alternative trade agreement is the concept of Fair Trade. These alternative trade concepts are hopeful developments for the improvements of the economical and social circumstances the producers in developing countries live in.

The second approach Phillips describes in her article is about the production of globalization through food. The main theme here is the mobilizing people who spread several ideas about food. Food has been central to the production of a global imaginary. The concept of a modern globe has been tied to consumption of particular kinds of food, the adoption of food regimes and the acceptance of particular food production regimes. Flows of scientific knowledge have been central to imagining the possibilities of modern agriculture. Food can also play an important role in imagining nations and may problemize the concept of national.

The imaginations of people are challenged when people are on the move. Refugees, travelers

and migrants play a huge role in reproduction and the expansion of ideas about food.

The main themes of this research, food and chain ordering, fit in the second and third analytical paths of Phillips' overview. In the following paragraph I continue describing these themes, which set the scientific debate in this research.

2.3. Ordering and niche markets

The organization of food in the form of the world food regime as understood and analyzed by amongst others Mc Michael (2009) and Van der Ploeg (2010) is only one form in which food marketing is ordered and organized. The supermarket may dominate the scene, but next to these there coexists a plethora of small producers and retailer selling food in many ways. The global food system (the production and marketing of food world-wide) in other words is constituted by different social forms of organization, including supermarkets, share holding companies, family businesses, individual entrepreneurs and so on. Each shape the way food is given meaning, is produced and sold to customers and thus transform food in many different ways. These forms co-exists but also compete for clients, for space and the social actors that design and shape the food system in their attempt to satisfy their shareholders and supporters. Ethnic food shop owners are a clear example of competitors of supermarkets. The ethnic food market is differently organized than the supermarket chain. In the chapter three this organization or ordering of the ethnic food market is described. The data are collected during empirical research in Utrecht, a multicultural city in the Netherlands. The data consist out of some observation of the neighborhood and the results of semi-structured interviews with ethnic food shops owners and costumers. These interviews were about (amongst others) the origin of ethnic food products, the origin of the shop owner and the costumers of ethnic food shops. The aim of these interviews is describing the ordering of the ethnic food market in Utrecht in comparison with the ordering of supermarket chains as has been described by Van der Ploeg (2010). This chapter proceeds with a short expose about niche markets. Elaborating what are niche markets is important for unraveling ethnic food markets. Are these to be understood as niche market? A second dimension we need to explore is whether there is a relationship between (international) migration and food and what

ate the consequences for the demand for food and the food market per se.

Niche market

A niche market is an ‘outside-the-market-strategy’, an alternative market agreement which goes beyond the rules of the global food system.

The aim of niche markets is to cope with the disadvantages of globalization, like the unfair competition in food prices, where large chains drive down the prices so much that small companies cannot survive and the environmental pollution.

To achieve this, food products in niche markets need to be differentiated from products in the conventional food market. The most important differentiation aspect of the products in niche markets is quality, a normative concept. Quality can be used as a valuable tool in the struggle to differentiate food products from the conventional food market.

Several authors have noted that one potential development strategy for marginal rural areas lies in the field of quality food markets (Gilg and Battershill, 1998; Illerby and Kneafsey, 1998; Ventura and van der Meulen, 1994). The most famous examples of quality food markets are the Fair Trade market and the organic food market. The products in these chains embrace the qualities fairness and sustainability.

The demand for these products causes the shift towards a ‘logic of quality’ as opposed to ‘productivist logic’.

Another example of an upcoming niche market is the market for local and traditional food products. In linking products to cultural markers or local images such as landscapes, cultural traditions, and historic monuments, their value can be enhanced because consumers identify certain products with specific places. In this way rural areas can begin to (re)valorize place through their cultural identity (Ray, 1998, cited from Ilbery and Kneafsey, 1998).

2.4. Migration and ethnic food

Besides the establishment of global organizations, institutions and food regimes, there is a different process of globalization which is human migration, the movement of people and their temporary or permanent geographical relocation. (Held et al, 1999). International as well

as national migrations are not a new phenomenon. People have always been on the move and their impulses are very diverse. Some people just travel; some people have torn from their homes and other search for a job. Sir John Hicks argued that “differences in net economic advantages, chiefly differences in wages, are the main causes of migration”(1932).

To give an impression of global migration; over the last 35 years, the number of worldwide international migrants has almost doubled, from 76 million to 150 million.

Migration and politics are strangled. There are implications of contemporary global and regional migrations for the autonomy and sovereignty of nation-states. First of all, the flow of illegal and undocumented migrants demonstrates the limited capacity of many nation-states to secure independently their own borders. Those states are unable to stop the flow of illegal migrants. Secondly, also the growth of international attempts to control national policies with respect to migrations demonstrates the changing nature of state autonomy and sovereignty. Transborder cooperation between states seems to be necessary. Further on, migration has transformed the domestic political milieu of states and has reshaped political interest. Finally, migration has altered the kinds of policy options available to states and the balance of costs and benefits that those policies bear.

Although migration and politics are quite strangled with each other, also economics and migrations are strangled. I will show this overlap by a section about the economic impact of migration on the host country and the home country. After that paragraph, the most important combination in this article is presented: migration and food.

2.4.1. Migration and development

Although migration and the integration of migrants in industrialized countries is a hot issue in policy debates, in social science migration is seen as a development issue. One theme what is very well documented is remittances (Ratha, 2003). This is a money transaction between a migrant and his or her family in their home country. By sending money, migrants play a huge role in the development of their home countries. Ratha (2003) estimates that official worker remittances to developing countries amounted to US\$ 72.3 billion in 2001 (Ratha 2003, cited at www.usaid.org, 2008) which makes the importance of remittances internationally recognized. Today, remittances are the second-largest source of financial resources to developing countries just behind foreign direct investment. Of the \$158 billion of U.S. total resources flows to the developing world in 2005, 26 percent came from remittances (USAID, 2008).

In order to develop the country of origin, migrants can do more than sending remittances. USAID (2008) has been started the Diaspora Networks Alliance, which will work to intensify the flow of knowledge and resources of migrants to their home countries to promote economic and social growth. Beyond remittances, they focus on creative mechanisms through which migrants can contribute to growth in their homelands.

USAID has identified the following six strategic diaspora engagement mechanisms:

- **Diaspora Philanthropy**, “collective remittances” for their home communities.
- **Diaspora Volunteerism**: opportunities to diaspora community members to return to their home countries to perform public service, bringing specialized and local knowledge to the tasks of economic and social development.
- **Diaspora Entrepreneurship**: diaspora entrepreneurs can play a role in gearing investments toward their countries of origins.
- **Diaspora Capital Markets**: diaspora can provide much needed capital to home economies through various capital market instruments.
- **Diaspora Tourism & Nostalgic Trade**: diaspora tourists support their home communities by buying nostalgic goods which typically are produced by micro and small-scale enterprises. Greater efforts can be made to promote diaspora tourism and to develop the capacity of the producers of nostalgic goods through value chain work.
- **Diaspora Advocacy & Diplomacy**: Increasingly diaspora communities are participating in the policy dialogues of their home countries and are engaging in cultural, political and commercial diplomacies between their adopted and home countries.

In the following paragraph I focus on the fifth diaspora engagement mechanism: nostalgic food or, as I prefer to call it, ethnic food.

2.4.2. Migration, food and new markets

Because since the number of worldwide international migrants has more than doubled in the last forty years, from 76 million to over 200 million, the demand for ethnic food increased as well. (Orozco, 2008) The large majority, if not all migrants, are consuming a large variety of commodities, of which the majority are food products purchased near their communities. Migrants seek to adjust to life away from their homeland by adapting and adopting different social and economic practices that reconcile with those from the home country. Importing home goods by relying on networks of ethnic retailers and international food and crafts distributors is an example of this process of adaptation and community formation.

According to Orozco (2008) the demand and acquisition for nostalgic goods functions as a manifestation and expression of three realities that shape immigrant life: community, identity and transnationalism, with very direct implications on economic development for both in host country and the homeland.

The export of these nostalgic goods represents a small portion of total exports to the host country, but they are the most consumed products of migrants.

According to Orozco (2008) a few conclusions on the ethnic market in the United States can be made:

- There exists an extensive demand for a wide range of products, many of which are home country 'non-traditional' exports, albeit they reflect traditional home country commodities (tortillas, cassava, cereal, tea, curry, etc.);
- These products are obtained within the community through local stores that offer most of what migrants seek, in convenient ways;
- The expenses incurred by the purchase of these products amount to almost US\$1,000 a year per person;
- The goods are a material representation of migrants' national and cultural identity;
- The products are part of a larger set of transnational economic activities migrants perform and represent;
- A distribution network exists, connecting small and large manufacturers and producers with home country distributors, U.S. importers and middle men, among others;
- The stores increasingly modernize their business operations and directly or indirectly stock their products with U.S. products and imported nostalgic products. Ethnic stores are relatively vulnerable to the external environment.

An example of a success story in the nostalgic/ ethnic food market is that of Espinosa. According to him the shortest path from an migrant to his homeland is through his stomach. He works at Washington Dulles International airport and sees people who travel from Central America to Washington which unusual products in their luggage. These products, like fruit, fried chicken and even live crab meant to satisfy the longing for tastes and aromas left behind. Espinosa decided, after the attacks on 9-11, to start his own business. He and his colleague started a business in cheese. Nowadays, they import 100.000 pounds of commodities per month, including ethnic products as rosquillas and Nicaraguan corn-based crackers. The business, De Mi Puelbo, is a prime participant in ethnic trade, a result of global economic activity and international migration. The nostalgic trade means for El Salvador 10% of its total annual trade, or \$300 million. Besides the money, Espinosa also create jobs in the villages of Nicaragua (Sanchez, 2008).

Besides the United States and the United Kingdom also in other Western countries, like the Netherlands, increases the demand for ethnic food products. According to Van der Schans et al. (2009) the Dutch ethnic food market provides three billion euro per year. They think the sales will grow to six billion euro within ten years. The demand for ethnic food products leads to changing products and markets. In the following paragraph the search for new products and markets is described.

2.4.3. Looking for new markets and products: the ethnic food market

The demand of traditional import products is changing because of the number of migrants in Western countries. They demand for non-traditional import products. This transition in the food market results in a search for new markets and products among migrant and Dutch entrepreneurs in the West. They do this to diversify their products and services from their competitors. Below, three different examples of this way of diversification in the food market are outlined. The entrepreneurs in these examples respond to the increasing demand for ethnic food products.

According to Lindgreen & Hingley (2009) 7.9 per cent of the UK population is from India, Pakistan, Africa or the Caribbean. This diversity has led to growing opportunities for organizations to market their products to ethnic, racial and religious groups. The influx of immigrants from different countries therefore presents many challenges and opportunities simultaneously. Businesses must ensure that they profit from this expanding marketplace, yet little attention focuses on the connection among burgeoning food markets, market demand

created by fundamental shifts in ethnicity and ethnic mixes, and for production in the UK. Market demand is met by importing food, even though a greater understanding of new markets could benefit all channel members.

This point has particular significance for the West Midlands region of the UK, which, after London, contains the largest black and ethnic minority population. It also engages in significant food production. The 2001 Census reveals that the black and ethnic minority population constitutes 11.26 per cent of West Midlands' regional population, of which Indians represent 3.39 per cent. Excluding white ethnic groups, more than half the region's black and minority ethnic group populations are Asian in origin: Indian (30.13%), Pakistani (26.06%), Bangladeshi (5.3%) or other Asian (3.53%). A further 17.5 per cent are black. Moreover, religion influences food consumption- most Hindus, for example, are vegetarians. This distinction could have implications for future food requirements as various ethnic groups come to represent larger proportions of the region's population. Should the specialist food requirements of a changing population be met by importing food or can exist local and regional food channels adapt and reconnect to serve these markets?

In the UK the product differentiation can encourage growth and add value to the market. In the market for fresh herbs, sales more than doubled between 2000 and 2005, such that herbs now account for 20 per cent of all sales. Because of the popularity of ethnic dishes, which often require specific fresh herbs, consumers are becoming more aware of the variety of herbs available, and coriander, widely used in ethnic cooking, has become the biggest seller.

A second example of diversification in the food market is the establishment of JK Fresh Produce in the UK. (Lindgreen & Hingley, 2009). This company is established by an Asian grower, who now farms 1200 acres after establishing himself as a grower only ten years ago. In some ways, this Asian entrepreneur offers a distinct advantage to customers, many of whom come from similar ethnic origins. Wholesalers maintain overseas ties based on ethnicity; similarly, UK supply channels might involve Asian growers supplying caterers and retailers directly and thus achieve a similar advantage. The owner provided a potential solution to the cultural disconnect problem faced by growers, because he could bridge the Asian culturally bound dominance of the fresh produce wholesale markets through the links of growers. He offers wholesale access to other local growers (including producers of specialist crops, such as coriander and fenugreek, destined for Asian end users) by providing his packing and marketing facilities, which then serve as a produce hub. In this way, JK Fresh Produce is a significant market channel innovator and acts as a language and cultural bridge. The company

supplies produce all over the UK through a wholesale market network. In addition, the company has invested in value-adding (e.g. grading, prepacking, cool storage) facilities. The market for specialist fresh produce is growing fast, and also the small scale growers have the opportunity to bring their products at the market.

A third example is the increasing focus of corporations and entrepreneurs on migrants in the Netherlands. In the Netherlands corporations and entrepreneurs increasingly focus on migrant food. The number of migrants is increasing which leads to a high demand for nostalgic products. (Verweij, upcoming) Dutch wholesalers, super markets and retailers change their assortment and immigrant shops arise. The supply of foreign products is increasing fast. An example of this new branch is Surinam Christmas bread (Surinaamse kerstbrood) created by Sunny. He, as a migrant from Surinam himself, understands migrants have certain need for nostalgic products. He differentiates himself by developing bread just for Surinam migrants. The package of the bread involves besides a picture of Santa Claus the flag of Surinam, which shows the nostalgic value the producer wants to show the costumers. By offering this group of migrants a nostalgic product, Sunny tries to response to the search for certain quality people are looking for (Interview at Food Center, 16-12-2009).

The last story is a clear example of a migrant in the Netherlands taking advantage of the growing demand for ethnic food products. Although there are a lot of examples, they are not mentioned so far in social sciences. Therefore, all important aspects of the Dutch ethnic food market are described in the next chapter.

Chapter three: ethnic food market in the Netherlands

The ethnic food market has been studied already in the United States (Orozco, 2008), but the situation in other countries are never mentioned so far. The focus in this article is on the Dutch ethnic food market, because The Netherlands is an interesting multicultural country with a high number of migrants and tourists.

3.1. Methodology

The aim of this empirical research is to describe how the ethnic food market looks like in the Netherlands. (Is it ordered as a niche market?) The research area of this study is in Utrecht, a multicultural city in the centre of the Netherlands. One specific neighborhood, Lombok, is the exact research area.

While describing the ethnic food market, the focus is on four different aspects. These aspects are: the general picture of Lombok, the character of the ethnic food shops, the origin of the products in the ethnic food shops and the kind of costumers of the ethnic food shops.

To be able to describe these aspects of the ethnic food market, observations are done and semi-structured interviews are taken among ethnic food shops owners and their costumers. The interviews involved several themes, like the character of the ethnic food shops, the origin of the owner, the origin and price of their food products, the location of the shop and the costumers' reasons for buying ethnic food products. In annex 1, the semi-structured interviews can be found. The data are collected during four visits between September 2009 and July 2010.

Before presenting the results of the interviews, statistics about the population in Lombok, food habits of the three largest migrant groups in the Netherlands and the history of the research area are described .

Demography

Utrecht counts 299 862 citizens in 2009. 94 423 citizens are migrant, because they or at least one of their parents is born abroad. The largest migrant group in Utrecht is the Moroccan population (9.6% in 2009), followed by a Turkish population.(8.7% in 2009) and the citizens with an Antillean or Surinam background. (3.3% in 2009). Although these statistics of Non-Western migrants is high, also the number of Western migrants is 10.5%. The total number of migrants in Utrecht is 36.3%. In the graph below the statistics are shown. In this thesis Dutch

citizens are people with Dutch parents and a Dutch nationality themselves. (Source: www.utrecht.buurtmonitor.nl, visited on 26-03-2010)

One neighbourhood is very multicultural. This neighbourhood, Lombok, is located near the center of Utrecht. In this neighbourhood 4478 people live with a foreign background and 7872 people with a Dutch background. As can be concluded; over half of the Lombok' population has a foreign background. Since Lombok is a multicultural neighbourhood, several ethnic food shops are located in the area. Especially two streets are popular by immigrant entrepreneurs and their costumers. The ethnic food shops in these streets, the Kanaalstraat and Damstraat, are visited during the research.

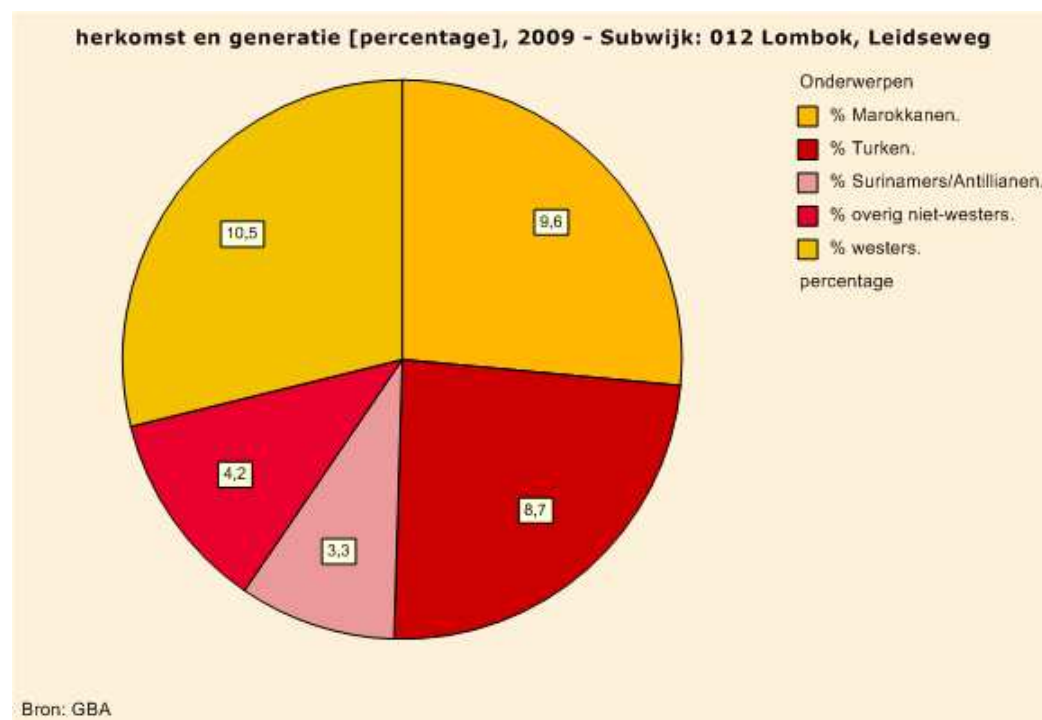


Figure 1: The percentage migrant groups living in Lombok. (including Leidseweg)

In Lombok the three largest migrant groups are Western migrants, Moroccan migrants and Turkish migrants. (www.utrecht.buurtmonitor.nl, visited at 13-04-2010)

As is shown in the graph above, the Moroccan and Turkish population are the largest immigrant groups in Lombok.

3.2. Food habits and dishes

In this paragraph the food habits of the two largest migrant groups in Lombok (Moroccans and Turks) are described. This is relevant for sketching a clear picture of what migrants in the Netherlands prefer to eat and therefore, what kind of food products they demand for.

Moroccans

Many Moroccan meals derived their origin based on different cultures and influences that Morocco has known throughout the centuries. There are French, Arabic, as well as Spanish influences on Moroccan meals. Examples are the introduction of cream by the French and psatila by the Spanish. Arabs introduces different bread types and meals based on grain (Seward, 1995). The Quran, the wholly book of the Islam, has a lot of influence on what Moroccans can and cannot eat. For example, they can only eat religiously slaughtered (halal meat), they cannot eat pork nor consume alcohol (Kattat & Kattat, 1999). Table manners in Morocco are also determined by the Quran. They say 'Bismallah' (in the name of god) before they start eating, they use their right hand to eat (left is unclean) and they thank God after the meal by saying 'Hamdolillah'. Within the Moroccan community food is very important for making and strengthening social contacts. Moroccans often invite someone over for a meal to form a social network. The eating habits also show the hierarchy within the family – men get their food before the women do. Women cook the meals and clean up after the meals.

For breakfast it is popular to have sfenj (donuts), pancakes and mint tea. Njoku (2006) writes that Moroccans primarily eat bread, butter, olives, and jam for breakfast. Lunch is the most important meal of the day - during lunch people have warm food.

As I said before, within the Moroccan culture, the Islam determines the food habits. According to the Quran everyone 12 years or older has to fast during the Ramadan. During this month they think about the poverty in the world and try to control their feelings of hunger. During this month they do not eat, drink, have sex and smoke between sunrise and sunset. At the end of the Ramadan there is a 3 day party: the Sugar fest. Together with family and friends everyone each sweet treats. Exactly 70 days after the Sugar fest they have the 'Sacrifice fest', at which they offer a lamb according to the Islamic tradition. Part of the sheep is give to the poor, part to friends and the remaining part is consumed by the family.

In the Netherlands there live a lot of Dutch people from Moroccan ancestry. Research has shown that they primarily eat onions, garlic, tomatoes, pumpkin, zucchini, carrots, coriander,

fresh mint, bread and peas (Van der Schans et al., 2009). These products are primarily bought in ethnic shops, and are mainly bought by men. According to Schijnen (2004) Dutch Moroccans more and more often try out Dutch recipes, like mashed potatoes. This is mainly because their children request these meals.

Turks

Benjamins (1982) investigated the food habits of Turkish people in Turkey and those in the Netherlands. The Turkish food habits are also strongly influenced by the Quran as well as by the Turkish culture. Like Moroccans Turkish do not eat pork meat or consume alcohol and they only eat halal meat. They as well fast during the Ramadan and they celebrate the 'Sugar fest and Sacrifice fest.'

Basic Turkish food products are bread, wheat and soup. In the morning they eat a bread meal, during lunch hours and for dinner they have a warm meal. On bread they eat sweet stuff (jam or honey) or salty stuff (cheese or Turkish sausage). Besides bread they also eat olives, eggs and yoghurt. They traditionally drink dark tea with sugar. For lunch Turkish people eat the leftovers from the dinner the night before. For dinner they prepare a stew with meat and vegetables. Besides that they also serve additional vegetables and soup. Typical Turkish meals are pilafs (rice meals), borek (filled pastries) and dolma's (filled vegetables). A popular drink, besides coffee and tea, is ayran – a sweet yoghurt drink.

According to Den Hartog (1980), Dutch Turks eat slightly different variants of the traditional Turkish meals. In general they eat less dough meals and more fruit and milk than Turks living in Turkey. According to Buijs et al. (1979) the meals consumed by Turks migrated to the Netherlands hardly differ from those consumed by Turks living in Turkey. This could be the case because all ingredients necessary for Turkish meals are easily available in ethnic shops in the Netherlands.

To conclude this paragraph, the two largest minority groups in Utrecht (migrants from Morocco and Turkey) prefer to eat their traditional food after migration. They try to hold on to their traditional food, but started combining it with Dutch food products. The reasons for this transition are the introduction of Dutch dishes/products by the migrants' children and the easiness of cooking Dutch food products. Through the large establishment of ethnic food shops in Dutch cities it is possible to buy all ingredients for making these dishes. It is remarkable that not only migrants change their traditional dishes after settling in The Netherlands, also Dutch people increasingly change their dishes by eating foreign food

products.

3.3. General picture of Lombok

After describing what Moroccan and Turkish migrants prefer to eat I continue in this paragraph with presenting a general picture of the character of the research area. Besides describing the history of the neighborhood, also some results of the first impression of the area are described.

Lombok is a former working class neighborhood. The houses are about a hundred years old. They are small, often in bad repair and cheap. When foreign workers came to the area in the 1960s they settled in these cheap houses in Lombok. The first foreign workers were Italian mineworkers. They were asked to come here because of the lack of Dutch people who wanted to work in mines. In 1964 there were even 130.000 vacancies for foreign employees. Most of the foreign employees intended to stay a short while to earn money, but soon it became clear they stayed for a long time. In 1960 22 people from Turkey and three from Morocco were registered. Five years later it were 9000 from Turkey and 4500 from Morocco.

In the 1950s also companies like Demka were looking for foreign workers. Besides Turkish and Moroccan men, also Greek migrated to Utrecht. Since the 1970s it became possible for all these men to import their wives and children to the Netherlands when they could show a work contract and a house. Most migrants in the Utrecht started buying the cheap houses in Lombok, because those houses were the only possibility to bring their wives and children. A newer group of migrants are people from the former Dutch colonies. After these areas became independent, the citizens could get the Dutch nationality and migrate to the Netherlands. Therefore, a lot of people from Surinam, the Antillean and Indonesia live in cities like Utrecht now. (Sag, 2010)

Nowadays, Lombok is a true reflection of the multi-cultural society the Netherlands have become over the last 50 years. Lombok is the place where people live and work that originate from different parts of the world, which adds to the impression of a cultural melting pot. You hear a range of foreign languages and the smell of all different food products. Although my first visit was on a Monday morning in September 2009 there were already people talking, laughing and walking around. Part of my research strategy was to walk slowly through the neighbourhood to find out what is so special about this area.

While walking through the Kanaalstraat I saw a few remarkable things. In most of the shops

food there is food for sale. Most shops carry names in a foreign language, like: Turkiyem, Dela, Persepolis and Delight market. I also noticed that a lot of that aim to cater for specific groups of people and above all migrants from Southern European countries but also countries like Turkey and Morocco. Examples are; the Turkish travel agency Bey tours, the Moroccan bank and a Turkish tailor. Besides these ethnic shops there are also Dutch (food) shops and two Dutch supermarkets (Spar and Albert Heijn) in Lombok. During this research I visited all fourteen ethnic food shops in Lombok to observe the character of the shops. In nine of these ethnic shops I did a semi-structured interview with the owner. These nine shops are: Konya firinci (Turkey), Turkiyem (Turkey), Dela (Iraq), Persepolis (Iran), Spar (Iran), Midden-Oosten market (Iran), Surinaamse market (Surinam), C.J. Afro shop (Nigeria) and Amar International (Surinam).

3.4. The interviews in Lombok

In this paragraph the interview results in Lombok are presented. The first seven interviews are general interviews, the last interviews with ethnic food shopkeepers were focused on especially one ethnic product: the date from the date palm.

The First shop I visited was **Bakker Delight** (or Konya Firinci what ‘bakery from Konya’ means). In this shop a twenty years old Turkish girl is helping me. She tells me they sell bread, drinks and sweets. The costumers are mainly Dutch and Turkish. The girl and her two family members that also work in the shop speak both languages. The sweets they sell are bought from a bakery in Amsterdam, which is easier and cheaper then making it themselves. The bakery is quite new; at April 30th in 2008 the uncle of the girl started the shop. Today they are very busy, because of the Ramadan is almost over and Muslims are busy preparing celebrations. Some of the bread comes from Germany, but most of it comes from Amsterdam. They buy it from wholesalers because they don’t have the space to make all the bread by them selves. In the bakery, they also sell Ayran, a Turkish yogurt drink. This drink carries the brand Silifke, a Turkish name, but is produced in the Netherlands by a Dutch dairy entrepreneur. Silifke is part of OZ&ER who distribute originally Turkish products in the Netherlands, Belgium and even Paris and London. It was interesting to note that none of the products in this bakery are imported from their country of origin, Turkey.



Türkiyem

The second Turkish food shop I visited is the mini supermarket Türkiyem. In this shop there are only Turkish products to buy. Everywhere I looked, I saw Turkish brands and names. In the back of the shops there is an Islamic butcher. I have spoken to the man behind the desk, a family member of the owner. In fact all the employees in the shop are family members of the owner. He tells me that the shop is some 15 or 16 years old now. He sees a lot of regular costumers. Although that the assortment is Turkish, also Dutch people come and buy food there. Almost all the products are directly imported from different cities in Turkey. The reasons are the low costs and high quality of the products.

Persepolis

Persepolis is a mini supermarket owned by two brothers from Iran. It is there since ten years. I talked to Mohamed, one of the brothers. He is in his mid-forties and came in 1998 to seek asylum in the Netherlands as a political refugee.

In the shops they sell a huge range of different products. I could not find any Dutch products or brands at all. Mohamed tells me his products are from Bulgaria, Spain, Turkey, the Balkan, Germany and Africa. Mohamed and his brother buy their food products from the wholesale and the auction every morning. One product is bought directly by himself from Iran. It is the date from the date palm. He buys these dates directly from a friend in Iran, to support him and offer the costumers high quality dates. The largest group of costumers (90%) are Dutch people, who specifically buy his high quality fruit.

Dela

The food shop Dela is owned by a thirty years old man from Iraq. When I took a look in his shop, he was talking Arabic on the phone. His employee in the back of the shop could not understand Dutch, so I decided to wait for the owner. In the meanwhile I noticed that all food products are from Turkey or the Arabic part of the world. (the Middle-East and North-Africa) The man tells me he started this food shop eight years ago. He sells a lot of foreign products, especially for migrants. 30-35% of his costumers are Dutch. All the products are bought via wholesalers from Rotterdam and The Hague. Sometimes the assortment change, particular when a costumer has a special request. The owner has a bad feeling about the future of his shops. The competition in the area is high, because most of the food shops sell almost the

same products. He has to lower his prices all the time to remain competitive and attract costumers. He works six days a week for very long hours. (7.30 pm until 08.00 am) He thinks about closing the shop and start an ICT company in Iraq. He can make more money there now the demand for internet access is high in his country of origin.

Suriname markt

In the Surinaamse markt a black man and woman, I guess Hindu, are behind a desk. The woman is constantly calling over the phone. Between the four phone calls she talks to me. She is the owner of this food shop for six years now. Nineteen years ago she started her first food shop, in Nijmegen. She started that shop in the first place to provide some jobs for migrants in Nijmegen. When the demand for Surinam, African and Indian food increased in Utrecht, she decided to start a second shop.

She sells food from India, Africa and Suriname next to food also cosmetics. Her group of costumers is diverse, about 20% of this group is Dutch. (the clients in her shop in Nijmegen are mostly (80%) African) The shop is important for the Indian migrants, because it is the only possibility to buy Indian products in Utrecht. Some Indian products are directly sold via friends and family in Delhi. These products arrive by boat, which take about ten weeks. It is therefore important that the family in India double check the sell-by date of the products. The reason for the direct trade from India is that these specific products can not be bought at wholesales in the Netherlands and it is easy to order small amounts of the products. .

The fresh products are bought at a wholesale in The Hague. It is very hard and expensive to import fresh products. Her future is good she says, because there is no other shop in Utrecht selling Indian products. Remarkable is the fact some of her costumers pay on credit because they don't have the money.

C.J. Afro shop

While entering this African shop, four black women were talking to each other in a foreign language. The owner, Sophia, wanted to talk to me unless my interview was not for television. Sophia is from Nigeria and sells food, cosmetics, telephone cards and all kind of wigs.

She began this shop six years ago, a dream became truth. She came to the Netherlands when she was twenty-one years old. She realized she was the only black girl in Dordrecht in that time. She missed the African food and products and decided to start an African shop to cater for the African migrants. Her costumers are mainly African (90%). The remaining 10% of her costumers are Dutch woman with an African husband, but also Turkish and Moroccan

customers. Sophia feels that the Netherlands is affected by a financial crisis. She sells less in the last months. Her products are from all over the world. Her wigs are from the United States and some food products are from her country of origin Nigeria. These products are very expensive, but she has to import it because she can't buy it from wholesalers in the Netherlands. Also a lot of products are from Germany, Belgium and the United Kingdom. The reason is that in those countries she can buy African products which she can not in the Netherlands.

Amar International

The owner of Amar International is very busy, but she talks to me for a few minutes. She and her husband started this shop twenty eight years ago. The Dutch customer accounts for 20-25% of all costumers. The remaining costumers are very diverse origins and backgrounds. Vegetables and fruit are the most popular products in the shop. She buys all her products from wholesalers in the Netherlands. Her future is safe, but she sees the costumers buy less now there is a financial crisis.

Dates in Lombok

The Moroccan wholesaler I interviewed in October 2009 is the owner of Bourmana. His company is quite big, every where I look I see boxes with food. At least three North-African men were picking orders and putting the orders in one of the small busses. The owner of Bourmana is a friendly forty year old man. He welcomes me in his office. He speaks perfectly Dutch and tells me about the dates he sells.

His dates are from Algeria, Tunis, Israel, Iran and California, USA. The big, soft Medjoul dates are from Israel and California. These are more expensive and sweeter than the 'Deglet nour' from Iran and Northern-Africa. The price of the Medjoul is 10 euro per kilogram, the Deglet nour are 2.50 per kilogram. He sells about 200 kilogram Medjoul date and 800 kilogram Deglet nour dates per week.

The owner buys the dates (and other products) via the auction nearby. He has a huge network and a lot of regular purveyors. In the last three years he noticed an increasing demand for dates. Not only migrants, but also an increasing number of Dutch people eat dates. The dates are always harvested in November, than dried, and ready for transport. They arrive at Bourmana by truck. The quality of the dried dates is not changing during the long trip. When I ask for dates from Morocco, the man tells me Morocco almost never export dates. Their dates grow into the wild, but are not produced on plantats.

Besides Bourmana, there are four other Moroccan wholesalers and a few Turkish wholesalers

in the Netherlands.

On October 5th in 2009 I continued my research in Lombok. I went to eight shops I didn't visit before and asked the owners questions about the dates they sell. These shops are owned by a Turkish, Moroccan or Iraqi man.

In six of the immigrant food shops only one or two kinds of dates are sold. These dates are often Medjoul dates or Deglet nour. The Medjoul dates are from South-Africa (3x) or Israel (1x). Five of these six shops sell dates from Tunisia. These dates are often from Bourmana (4x) or from other immigrant wholesalers in the Netherlands. One shop, 'Slagerij Mhaia' sells dates from Saudi-Arabia, also bought in the Netherlands.

Two interviews were very special. The owners of these shops were very helpful and friendly.

Spar Lombok

The assortment of the supermarket 'Spar' in Lombok is different than that in a usual Spar. The assortment is much more ethnic, besides the Dutch products also a lot of foreign products are sold. Dates are just one example. Spar Lombok sells three kinds of dates, two from Tunisia and one from Iran. The Tunisian dates are 'Deglet nour' dates, which are very popular amongst migrants in the Netherlands. The owner, from Iran, shows me two packages. These dates are small and dark. The smallest package is 95 eurocent; the bigger package is more expensive. He tells me he buys these Tunisian dates at Bourmana. The other date is from Iran. It is almost black, but softer than the 'Deglet nour'. This date is from Iran, but he bought it at NAZ an Iranese wholesaler in Almere. (near Amsterdam)

Midden-Oosten markt

The Midden-Oosten markt (Middle-East market) sells a lot of different date products. Although the owner and I couldn't understand each other very well, he was very glad to help me out. In this shop they sell five kinds of dates. The owner and his nephew showed me several different dates and products.

The first date is Zahdi from Iran. These dates are hard and small, but very nice. (I tried one)
The second date was branded as BAM, an Iranese date as well. These dates are very soft and need a special treatment. They need to store cold and dry. The third date they showed me is the Medjoul date, this time from Mexico. According to the owner these dates are modified and lose therefore their taste. The next date was Khodary from Saudi-Arabia. He buys this date in London at the auction, (Damagate) because *'Saudi-Arabian dates can not be bought in*

the Netherlands' .(Owner of Midden-Oosten markt at 13-10-2009) In London he orders a whole container food which will arrive by boat. The dates travel next to the cold store, to maintain the quality. He buys all these products in England because of the low costs. The last date the man sells is Bhri from Syria.

For the first time I saw dates can also be added in other food products. In Midden-Oosten markt they sell date cookies from Tunisia and Saudi-Arabia (Maamoul). They also sell date syrup, what the employee eats every day in his yogurt. They sell syrup from Syria (Durra), Iraq and Egypt.

While I am looking at all those products, the owner tells me about the three wars in Iraq. After these wars more than 50% of all date palm have been destroyed. Since then Iraq is no longer the biggest date exporter in the world.

To conclude this interview: in the Midden-Oosten markt they sell five kinds of dates. They buy them from Bourmana, Naz and the auction Damagate (London). The owner doesn't buy dates directly from Iraq.

After observing the research area and the ethnic food shops I can conclude the following:

- The assortment of the food shops is quite the same, although the origin of the owners is different. The Turkish, Iraqis, Iranian and Moroccan owners of food shops sell almost the same products. They all sell fruit and vegetables.
- The shops are owned by immigrants and all shops except one are typical family businesses. The employees of ethnic food shops are mostly family members of the owner. Therefore, the owners provide work places for migrants from the same origin. Often, the owners of food shops work with just one or two employees. The shops have been established between one and twenty-eight years ago.
- Ethnic food shops are often small but the owners utilize their shelf space very well. They sell a great variety of food products. However, this makes most of the shops look a bit messy. The location of the ethnic food shops is important for the accessibility for costumers.

3.5. The ethnic food market in Utrecht

In this part of the article the assumptions of KIT are tested by analyzing the collected data from the semi-structured interviews. After repeating the assumptions, the results per assumption are presented.

1) The first assumption of the KIT is that ethnic food shops owners in the Netherlands import food products directly from producers in their country of origin. The reasons for doing this could be the low costs, being able to order low quantities, having no alternative for buying these products, to be able to trust the person they trade with and to support them financially.

From analyzing the collected data among ethnic food shop owners about the trade link between them and their country of origin it can be concluded the first assumption is incorrect. Only three ethnic food shop owners buy some products from friends and family in their country of origin (Turkey, India and Iran). This quantity is often rather small. The reason for this direct trade is not to support producers in their country of origin but because it is the only way to get specific food products consumers ask for and to be able to order small quantities. However, the costs of this kind of trade are very high and the transport might take weeks or even months. Therefore, most food products are bought from wholesalers in the Netherlands. These wholesalers could be immigrant wholesalers as well as Dutch wholesalers who also started to import non-traditional food products now the demand is growing. In general, these wholesalers, located near all large cities, sell all the food products the ethnic food shops owners need. The products wholesalers and ethnic food shops owners sells carry the image of originating from abroad. Most products have a label with foreign languages, but are not necessarily produced abroad. A clear example is Ayran, a Turkish yogurt drink. A popular brand of this product is Silifke, a Turkish name, but it is produced in Leiden. The reason for producing under a foreign name is to give the consumer the feeling it is from their country of origin.

2) The second assumption is: the main reason for migrants to consume traditional food, bought from ethnic food shops, is because this food involves nostalgic value.

This assumption is incorrect. After analyzing the collected data from the interviews with costumers it can be concluded that the most important aspects for costumers to buy food from ethnic food shops are the high quality of the fresh products (mentioned by seven of the interviewees), the price of the products (mentioned by four of the interviewees) and the broad

assortment of ethnic food products in this specific area (mentioned by six of the interviewees. Other important aspects for costumers to buy their food in ethnic food shops in Lombok are the good service (3), people are accustomed to the shops (2), the possibility to buy halal food (2), the easiness of shopping close to their home (2) and the ambiance (1) .

The costumers come to Lombok from all different areas in Utrecht. Only four of the fourteen costumers live in Lombok or nearby. Three of the interviewees came from outside Utrecht but still shop in Lombok because they lived in here before (2) or because they needed specific ingredients for a traditional dish which could not be bought in her city (1). None of the interviewees mentioned to buy ethnic food products in Lombok because it involved a nostalgic value or because it supports producers in their country of origin. The latter can be concluded because all the interviewees buy their food in more than one ethnic food shop. They are not interested in the origin of the owner and the origin of the products. The food price and quality are the decisive factors for choosing the shop they do their groceries.

3) The third assumption is: the costumers of ethnic food shops in the Netherlands are (mainly) migrants.

Also this third assumption is incorrect, because the costumers of ethnic food shops in Lombok are diverse. Not only migrants buy products from ethnic food shops, a lot of Dutch persons too. In fact all shops attract Dutch costumers, in varying degrees: between less than 10% in the African shop and 90% in an Iranese mini-supermarket. The Dutch costumers buy mainly fresh products, like fruit, vegetables and bread. The so-called ethnic products are mostly sold by migrants, but also some Dutch costumers eat traditional dishes from abroad. One interviewee mentioned never doing her groceries in supermarkets. She buys all her food products in the ethnic food shops in Lombok, although she lives in an other neighborhood. The reasons for doing this are; the high quality of the fresh products, the good service in the shops and the lower price of products in comparison with the price in supermarkets.

After analyzing the data from the interviews with all costumers it can be concluded most interviewees buy fruit and/or vegetables in the ethnic food shops. (No matter if they are Dutch or migrant) Two costumers, one Dutch and one Muslim, bought halal meat at an Islamic butcher and only one interviewee bought 'Arabic' make-up. As well for migrants as for Dutch consumers the origin of the ethnic food shop owner is not as important as we assumed. Therefore, also a lot of Dutch costumers buy fresh food products from ethnic food shops.

To summarize the results: The ethnic food shop owners in Lombok buy most of the food

products from wholesalers. There is (almost) no direct trade between shop owner and producer in their country of origin. The most important reasons for buying food from ethnic food shops are; the high quality of food, a low price and the central location of the shops. Interviewees in Lombok did not mention the importance of the 'nostalgic' value of products. The last conclusion is that the costumers of ethnic food shops in Lombok are divers. All shops attract Dutch people as well migrants. Dutch people buy fresh products like fruit and vegetables, migrants buy besides fruit and vegetables also the 'ethnic' food products.

In the following, final, chapter the main question (What does the ethnic food market chain in the Netherlands look like in comparison to the supermarket chain?) will be answered by comparing these results above with the ordering aspects of the global supermarket chain.

Final conclusion: ordering ethnic market.

This thesis explored the dynamics of the ethnic food market in the Netherlands. This phenomena is rather new and hardly studied. This thesis made use of insights from the globalization of food and globalization of migrant labor to formulate an agenda for empirical investigation. One of the dimensions of food that is marginally covered in the globalization of food studies is the role of culture and changing food habits of people. The cultural dimension presents itself as an interesting angle to explore food consumed by migrants which has led to the formation of the so-called 'ethnic' food market.

The leading perspective was that markets are ordered in many ways and that a variety of stakeholders operate in the making of markets. These markets are understood as main stream markets, ethnic food, niche markets were on reflecting in my view an understanding of a logical and nicely ordered market along different networks that link particular consumers through the market agency to producers all over the world. The data I collected in a neighborhood in Utrecht actually challenges this view. My findings point at markets being heterogeneously organized, at times messy on the basis of which one can question basic assumptions made by experts and development agencies. There is not one pattern, and there may be not even one order but many. The ordering is not uni-dimensional but multidimensional, reflecting in turn the multiple realities of food.

In this thesis the ordering of the ethnic food market in the Netherlands is described. An important starting point in this research is the assumption that the ethnic food market is a niche market. In this final chapter the research question (what does the ethnic food market in the Netherlands look like?) will be answered.

The ethnic food chain

From the research data can be concluded that the most important aspects for customers of the Dutch ethnic food market are food quality, food price and shop location. None of the interviewees mentioned the high importance of the imbedded nostalgic value of ethnic food. Another important aspect is that the shop owners buy their food from (immigrant) wholesalers in the Netherlands and (almost) never from producers in their country of origin. Buying from wholesalers is easy, cheap and they have a broad assortment. The last important aspect of the ethnic food market is that the customers of ethnic food shops are diverse. All shops attract Dutch people and migrants. Dutch people buy fresh products like fruit and vegetables, migrants buy besides fruit and vegetables also the 'ethnic' food products.

These aspects can conclude the following: the ethnic food chain in the Netherlands is part of the global food market (because the products are bought from wholesalers), but is differently ordered than supermarket chains. The ordering exists of trustful relations between shop owner and customer, high quality food, fair prices, low profit for the food shop owners, good service and a central location in a multicultural neighborhood.

The ethnic food chain is differently ordered than e.g. the supermarket chain. As has been concluded in chapter three, all KIT's assumptions about direct trade, nostalgic value and the customer group are incorrect. It can be said KIT expected to see a whole different market dynamic, namely a niche market. But the ordering seems to be not uni-dimensional but multidimensional. Therefore there is no clear separation between the ordering of the global food chain and the ordering of niche markets, these orderings are mixed.

Discussion

All three assumptions about the ethnic food market in the Netherlands were incorrect. The ethnic food market is differently ordered than KIT expected. They thought food products from Dutch ethnic food shops are directly bought from producers in developing country. It can be concluded this is not the case in Utrecht. The ethnic food market is part of the global food market, not a niche market as KIT expected. Therefore, there is for KIT no possibility to empower specific small-scale producers in this chain. There isn't a strong trade relationship between migrants in the Netherlands and the producers in their country of origine. It appears the ethnic food chain is differently ordered, which results as an end of this research area for now.

Although KIT cannot start a project in specific developing countries, they now know the ethnic food market establishes some sort of development dynamic. The food products within the ethnic food chain are imported from developing countries, in turn stimulating local markets. This market dynamic of the ethnic food market could be fairer for farmers than the supermarket chain.

Critics

The first critic on this research is that data is collected from only one multicultural city in the Netherlands. It is therefore hard to draw conclusions about the whole Dutch ethnic food market. By doing the same kind of research in other Dutch cities the situation will be better presented.

After doing research it is good to take a closer look at the whole process. In this short paragraph I would like to tell about the two most important mistakes during doing this research. The first one was the long search for the scientific debate for the theme, the second mistake was the bad methodology.

It was very hard for me to write this article according to scientific standards. I couldn't chose a scientific debate for my research theme. Therefore, the first drafts of this article weren't scientifically written. My supervisor, Paul Hebinck, had to help me focusing on one specific theme. After doing this I had to change a lot of paragraphs and the main aim of the research.

(to compare the ethnic food chain with the supermarket chain in state of just describing the

market in Utrecht) Hebinck has been a great help.

The second mistake in my previous draft was doing semi-structured interviews in two different cities in two different ways. In the first city, Utrecht, I used a whole different methodology as I did in Amsterdam. Therefore, my supervisors (Hebinck and Arce) advised me to focus on only one city: Utrecht. I removed all the collected data from interviews in Amsterdam. After doing this, the article became more structured. The description of the ethnic food market in Utrecht is now more in dept than it was before.

After all, I can be proud at my article. It was sometimes hard for me to remover all the parts from my previous draft, but after all it was very nice to do this research.(especially the interviews) The whole process has been an important step forward in my own development!

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Appendix 1: The semi-structured interviews used in Utrecht.

1) Interview ethnic food shops owner

Kind of food shop

- How would you describe your shop?
- When did you establish this shop?
- On who do you adapt your assortment?
- What was the reason to establish your shop?

The consumer

- Who (which group) is your largest customer?
- Is your group of customers changing over time?

The assortment

- Which product of what products is/are most popular?
Where do you buy the food products you sell?
- Did your assortment change over time?

The future

- How do you see the future of your food shop?
- Do you notice changes in origin of your customers, the demand and the supply?

2) Interview customers Lombok

- Where do you buy your groceries?
- Why do you buy it in that ethnic food shop?
- What did you buy today?

- Why did you buy that?
- Are you also doing your groceries in other shops?
- What shops?
- Where do you live?
- What is your background?

