

DISTRIBUTION OF ECOLOGICAL PRODUCTS: THE CASE OF SUPERMARKETS AND SPECIALTY RETAILERS

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Abstract

The aim of this work is to determine how the distribution of ecological products is developed in two types of retailers, big supermarkets and small specialty stores, which are located in Bilbao (Spain). With the collaboration of four stores, a multiple case study is developed in order to find similarities and differences in the ecological businesses of both types of distribution.

The results suggest that the gap between ecological production and consumption might be narrowed in a near future through a higher availability and accessibility of ecological products provided by both types of retailers. Both types of retailers are able to adapt their supply of ecological products to healthier and sustainable trends of current consumers, adopting different positioning strategies.

Resumen

El objetivo de este trabajo es determinar cómo se lleva a cabo la distribución de productos ecológicos en dos tipos de minoristas, supermercados grandes y pequeñas tiendas especializadas, situados en Bilbao (España). Con la colaboración de cuatro establecimientos, se desarrolla un estudio de casos múltiple para encontrar semejanzas y diferencias en los negocios ecológicos de ambos tipos de distribución.

Los resultados sugieren que la brecha entre la producción y el consumo podría reducirse en un futuro cercano mediante una mayor disponibilidad y accesibilidad de los productos ecológicos proporcionados por ambos tipos de minoristas. Ambos tipos de distribuidores son capaces de adaptar su oferta de productos ecológicos a las tendencias más sanas y sostenibles de los consumidores actuales, adoptando para ello diferentes estrategias de posicionamiento.

1. Introduction

In recent years, people have become more focused on their health, and also more worried about the products, which are consumed. This tendency to pursue a healthy lifestyle also brings with it a tendency to consume ecological products. Apart from that, the growing importance and awareness of environmental problems also bring the result that consumers start to think more about what they consume. This is why green marketing has gained attention, as it gives an impression of a company that shows sensitivity, transparency and ethical behavior (Bati, 2016).

This work analyzes the case of the smaller specialty retailers and the supermarkets that sell ecological products in Bilbao (Spain). The distribution is especially interesting since Spain is recognized as a key producer of ecological products but the demand is still relatively small (MAGRAMA, 2012). Moreover, there are still rather few works regarding the distribution of ecological products in Spain.

In particular, the aim of this work is to analyze two different types of stores, two specialty retailers and two supermarkets, and make a comparison in order to identify how the distribution of ecological products is developed, looking for similarities and differences between both types of retailers. In the analysis, the focus is on the variables of the Marketing mix, to find out how these different stores compete with each other, and which advantages or disadvantages each type of store has. It will be interesting to find out more about the product range, its pricing policies and its distribution, whether the preference goes to local products or whether there are longer supply chains.

2. Case Development

Case study method and criteria for the selection of multiple cases

The cases will be partly presented separately, but also addressing various propositions in a cross-case analysis. The cases can be selected by looking for polar types –cases where it is more successful or rather unsuccessful (Eisenhardt, 1989), but, in this study, the focus is already on different types of stores - specialty retailers and supermarket chains-, and on “how” the ecological products have been commercialized. The number is kept rather small to focus in detail on the circumstances of each case.

In Bilbao, we can find approximately five supermarket chains and six specialty retailers. The selection of the companies has been according to the time which they have been in business, their willingness and availability to provide information.

The methodological tools used in the study were a survey, an interview with a semi-structured questionnaire and the direct observation. The interviewed people were the owners of the stores in the case of the small specialty retailers, and local store managers in the case of the supermarket chains. These tools should serve to be able to provide practical proposals to improve the green market. In order to do so, a SWOT analysis for each store was included in the study.

The companies included in the study

This multiple case study comprises four stores located in Bilbao (Biscay, Spain). Two of them are supermarket chains, which include ecological products in their product range, and the other two are specialty retailers, which are selling exclusively ecological products. To do the analysis, the two supermarket chains are considered in group A and the two specialty retailers in group B. This permits to make an in-group comparison and later on an inter-group comparison.

Group A

Supermarket El Corte Inglés

The supermarket is part of the Spanish department store chain ‘El Corte Inglés’, founded in 1940. The stores are mainly on the Iberian Peninsula, including Spain and Portugal. The brand is known as prestigious and classic. In the case of Bilbao, the location is in the department store in the heart of the city center in the district of Abando. This supermarket started to include ecological products in their product range already several years ago as they noticed it as a market opportunity due to the increasing popularity of ecological products.

In recent years, the product range has expanded a lot, and the plans are to further increase product references and differentiate the product more appropriately from the conventional one. When it started, the product range was based on few producers and was rather reduced but nowadays it often happens that producers or wholesalers establish contact with the supermarket in order to introduce their products. Currently, it counts with more than 1,500 references of ecological products and more than 500 consumers per week, who tend to visit the supermarket on a regular basis. Concerning the popularity, food products are the most popular.

Carrefour Market

Carrefour is one of the largest retail chains of the world. It includes different types of supermarkets, depending on the size and products offered. In some countries, one can find Carrefour bio stores, but in the region of Biscay, there only are Carrefour markets and Carrefour express (the first one includes ecological products in their product range). The store included in this study is located in the old town of Bilbao, close to the emblematic market Ribera. It introduced ecological products some years ago, increasing gradually the product due to the demands of the consumer. The consumers, who access the store, tend to be from the same district. There is the intention create a specific zone in the store exclusively dedicated to ecological products and health products. In the past, the ecological products were put with their conventional alternatives but now the ecological products are already collocated together. The products normally come from local or national producers. About 10% of the product range in store is ecological but it is expected to increase it.

Group B

Naturalis

Naturalis is a specialty retailer in ecological products, which is family-owned. It is located relatively in the center of Bilbao, in the district of Indautxu, an area with a lot of traffic of people. It opened 2.5 years ago when the owners recognized the market opportunity that in Bilbao there was a lack of availability of ecological products. The owners have been green consumers for long, and before opening the store, they travelled around in countries like Ireland, Netherlands and the region of Catalonia in order to visit specialty retailers. The store has more than 500 consumers per week, who tend to visit the store on a regular basis. The consumer especially appreciates the products “0 km” and fresh products as vegetables and fruits. The variety depends on the seasons of the year having a focus on local products, which have passed only short distances from the place of production to the store. In the store, the owners provide comprehensive information about products and their properties, alternatives, and also recommendations. They hold workshops about nutrition. The store finds its producers on regional and national level. There are no own brands of the store. Cereals and legumes are sold without packaging by weight.

Sania Productos Ecológicos

Sania is located in the old town of Bilbao and it counts with approximately 5 years being active as a specialty retailer. It is also a pick-up point for shopping baskets for consumer groups. The founder has been a green consumer before opening his business and took about half a year in informing himself before opening it. However, this store is smaller than the other one of group B. According to estimations, there are between 50 and 100 consumers per week. There is no own brand of the store. The owner thinks that a good customer service and a friendly contact with the consumer can motivate the consumer to repeat the purchase in the location. In this case, the main form of advertisement is in the form of mouth-to-mouth. The product range has been increased based on the tendencies of the market. In many cases, products were demanded by consumers and as a result have found its way into the product range. Meat products are not included in the product range of Sania. The store also offers less common ecological products as animal food and wine. The suppliers are mainly small producers and wholesalers. Sania tries to focus on national and regional products but also includes international products.

SWOT analysis

Table 1. SWOT analysis group A

Strengths		
Supermarket El Corte Inglés	Carrefour market Bilbao	
<ul style="list-style-type: none"> • Good reputation and recognition of the brand of the department store • Broad variety of products – more than 1500 ecological products • More than 500 green consumers per week • Availability of green brands but also of own brand • Strong engagement in product promotion in store, on website and in social networks • Various sales channels – buy in store, order online and get the products delivered or with the option to pick up the products at a selected store • Intention to expand the ecological product range 	<ul style="list-style-type: none"> • International retail chain • Promotion activities in store and online • Making use of the website and social networks in order to promote products • Between 100 and 500 green consumers per week, regular consumers • Ecological products with green brands and with own brands • Does market research in order to find the ideal product range • Take into account the competitors • Intention to create a zone focused on ecological products and health which is in line with the trend of the healthy lifestyle 	
Weaknesses		
Supermarket El Corte Inglés	Carrefour market Bilbao	
<ul style="list-style-type: none"> • Less specialization in ecological products compared to specialty retailers • Distribution of ecological products in the store is dispersed so that a green consumer has to search for the products • Few information provided in store and no consultation 	<ul style="list-style-type: none"> • Small product range of ecological products in location, but the chain of the supermarket also has stores which are specialized on ecological products (Carrefour Bio), but not in this region • Lack of specialization • No consultation about products in store 	
Opportunities		
<ul style="list-style-type: none"> • Market with good opportunities for growth • Increasing accessibility of ecological products permits a better commercialization • Incentives to educate consumers about the advantages of consuming ecological products • Increasing awareness in the population about environmental issues offers an opportunity for growing demand • A growing demand and an increasing production of ecological products might result in price reduction • Tendency of a healthy lifestyle 	Threats	
	<ul style="list-style-type: none"> • Products are perceived as expensive by the consumer • Credibility of the products, “green” is often believed to be a marketing strategy • Lack of knowledge about green labels and green attributes • The informed consumer demands products with a higher degree of specialization which the specialized stores fulfill easier than the supermarkets 	

Source: Author's own elaboration.

Table 2. SWOT analysis group B

Strengths		
<i>Naturalis</i>	<i>Sania Productos Ecológicos</i>	
<ul style="list-style-type: none"> • Focus on local products • High degree of specialization, differentiation -> highest quality at an affordable price • Well-structured and well lighted store • Good customer service • Recommendations personalized and based on own experience as green consumer • Holistic approach when offering vegetables and fruits, due to seasons • More than 500 green consumers per week, regular consumers • Focus on recognized brands, no own label • Periodical promotions of products, degustation of products • Home delivery 	<ul style="list-style-type: none"> • Specialization on ecological products • Well balanced product range on a small space • Good customer service • Promotions on selected products • Own experience as a green consumer results in a potential for recommendations • Diversity of fruits and vegetables • Consumer groups • Home-delivery in the zone of Bilbao 	
Weaknesses		
<i>Naturalis</i>	<i>Sania productos ecológicos</i>	
<ul style="list-style-type: none"> • High prices • Products as vegetables not always available due to seasons can be perceived as a disadvantage by some consumers • Less capital and influence than the bigger supermarket chains and the franchise chains 	<ul style="list-style-type: none"> • Price relatively high • Some products are not available as for example meat and sausages • Few activities on website and social networks • Less consumers than in the other specialty retailer, estimated between 50 and 100 per week • Less capital and influence than the bigger supermarket chains and the franchise chains 	
Opportunities		
<ul style="list-style-type: none"> • Tendency to educate the consumer in a healthy and sustainable diet • Growth of the sector of ecological products • Grow and differentiate further in order to survive against the competitors with big chains • Better offer and availability of products can facilitate a higher level of consumption • Government incentives in order to foster ecological agriculture and consumption • Green consumers are usually less price-sensitive 	Threats	
	<ul style="list-style-type: none"> • Limited extent of local producers • Lack of knowledge of consumers about products and its properties • Products are perceived as expensive • Large chains of ecological retailers are often able to offer products at a lower price • Presence of ecological products in supermarket chains • Less negotiating power with producers and wholesalers 	

Source: Author's own elaboration.

3. Questions (propositions) for discussion

At this point, the following propositions (see Table 3) have been derived, based on a literature review, and shall be addressed next in order to verify its confirmation, and looking for similarities and differences among the different types of retailers analyzed.

Table 3. List of propositions

Propositions	
Consumer	1. The green consumer is health-conscious and is pursuing a healthy lifestyle.
Strategy	2. Supermarkets and small specialty retailers pursue different strategies for positioning their products.
Product	3. The assortment of ecological products has been growing in the last years and it is expected to continue expanding in the different types of retailers in the next years. 4. The assortment of ecological products in supermarkets is wider than that of specialty retailers.
Price	5. The price is a crucial impediment for expanding the consumption of ecological products in The Basque Country.
Place/Suppliers	6. Short distribution channels are predominant in the distribution of ecological products due to the preference of local products and suppliers.
Promotion	7. Recommendations of sellers can be a crucial point to convince the consumer about the features of ecological products.

Source: Author's own elaboration.

Results and Discussion

This part serves to discuss common points, and to try to give answers to the research questions. In the following lines, the propositions will be checked starting with the green consumer.

Table 4. Propositions regarding the consumer

1. The green consumer is health-conscious and is pursuing a healthy lifestyle.	
Supermarket El Corte Inglés	The consumers of ecological products are very health-oriented and tend to be well-informed about the products they purchase. They normally access the store already knowing what they are looking for.
Carrefour Market Bilbao	The consumer of those products is supposed to be rather specialized and health aspects seem to be the principal motive to consume ecological products, which is in line with the tendency of the society to adapt a healthier lifestyle and thus a healthy diet. Many of the consumers are seeking products with reduced fat or sugar. In other cases, they are looking for milk substitutes as intolerance of lactose has received more attention in society.
Naturalis	The consumer profiles are diverse. From one side there is the conscious consumer who buys as much of ecological products as possible but there are others who rather focus on buying fruits and vegetables or food for children. Apart from this, there are consumers who are seeking to reduce fat and sugar or the consumption of milk. In general, consumers tend to look for a healthy diet and a healthy lifestyle.
Sania Productos Ecológicos	The consumer profile is diverse ranging from quite conscious consumers who consume as much of ecological products as possible to consumers who try this type of products from now and then. The principal motives to consume ecological products have been health – which is in accordance with the answer of the other locations – but the environmental consciousness and sustainability has also been mentioned as one of the fundamental reasons to consume ecological products.

Source: Author's own elaboration.

Regarding the first proposition, it can be concluded that, the health aspect of ecological products is the most important for consumers who are buying these products, and thus, the proposition can be confirmed. When asking for the motivation to consume ecological products, one motive was mentioned in all four cases: they are supposed to be healthier and thus especially interesting for people following a healthy lifestyle and diet. Besides the health aspect, consciousness and sustainability have also been mentioned in some cases. Thus, people engage in the consumption of ecological products due to environmental reasons, consume products, which have a less harmful impact on the environment or intending to consume in a sustainable way.

Table 5. Propositions regarding strategy

2. Supermarkets and small specialty retailers pursue different strategies for positioning their products.	
Supermarket El Corte Inglés	Supermarkets offer ecological products in order to broaden their product range and to be in line with the latest product tendencies. The offer of ecological products tends to be less specialized than in the small specialty retailers.
Carrefour Market Bilbao	Supermarkets attend a more general market whereas the target market of small specialty retailers is rather specialized. Due to this, the two types of stores have to pursue different strategies.
Naturalis	Supermarkets and specialty retailers pursue different strategies when selling and positioning their products based on the nature of their corporations; supermarkets normally attend a broad mass of clients with offering a broad mass of products. This often results in a strategy of low cost, although there are differences between the supermarkets themselves too. The small specialty stores cannot go for a strategy of low cost but rather differentiation through a high level of specialization of the product range and by being able to provide the consumer with comprehensive knowledge about the products, and by a good customer service. Thus products are often offered at a high price but showing a high quality.
Sania Productos Ecológicos	Customer service and direct contact with the client in specialty retailers are the main elements to foster repurchase and to obtain a competitive advantage whereas in supermarkets, there is a lack of contact and service is more generalized.

Source: Author's own elaboration.

Regarding the second proposition, the two types of stores are quite different from each other in their nature, and thus, they pursue different strategies. For supermarkets, the commercialization of ecological products is a form of broadening the portfolio, and being in line with tendencies in order to reach as many consumers as possible. In the supermarkets, there are often only a few ecological products to their conventional alternatives. They follow a "differentiation" strategy. In the case of the specialty retailers, there tends to be a high level of specialization, in the sense that, there is a broad choice of products with different qualities at a reasonable price. Thus, a "niche market" strategy is followed. It is very important for the smaller retailers to be innovative and customer oriented. The loyalty of customers is especially important, as the specialty retailer tends to address a smaller number of consumers in general than a supermarket.

Table 6. Propositions regarding the product

4. The assortment of ecological products in supermarkets is wider than that of specialty retailers.	
Supermarket El Corte Inglés	Both types of stores show quite a variety of ecological products. However, in the supermarkets there is less choice of ecological products in a certain product category. For example, when looking for a nut butter, in supermarkets there might be one option whereas in specialty retailers there might be various options. The general product range in supermarkets is bigger, but concerning only ecological products, specialty retailers and specialized ecological stores show more product variety.
Carrefour Market Bilbao	The assortments in supermarkets is smaller than in specialty retailers as supermarkets often only have ecological alternatives for some products as it is only a small part of the product range whereas the specialty retailers are completely specialized.
Naturalis	Supermarkets often only have few ecological products in their product assortments and those which are included often are rather low quality compared to other ecological products.
Sania Productos Ecológicos	The part of ecological products in supermarkets is rather insignificant as there is not a lot of choice of ecological products.

Source: Author's own elaboration.

In relation to the third proposition, there is the expectancy of a growing ecological market in the region, in all cases. The product range has also increased significantly in size, especially in the supermarkets, whereas the size in the two specialty retailers has not increased a lot, but the assortment of the products has rather shown some changes regarding the brands featured in it.

The fourth proposition regarding the size of the assortment of products cannot be confirmed. It has been suggested that the quantity of ecological products is still rather small, and there is not a lot of variety when looking at a certain product type, mainly in supermarkets.

Table 7. Propositions regarding price

5. The price is a crucial impediment for expanding the consumption of ecological products in the Basque Country.	
Supermarket El Corte Inglés	The higher price is accepted among consumers as the product shows distinct attributes that the conventional product does not possess. In order to reduce prices in the future, it is proposed to increase production and availability. An increasing offer of ecological products will lead to an increasing consumption from the consumer side. Prices have already decreased slightly.
Carrefour Market Bilbao	The price indeed is mentioned as a problem as the products tend to be more expensive. However, the expectancy is that with a growing production and consumption the prices can be reduced.
Naturalis	The price of ecological products is higher than the price of conventional alternatives which partly due to the fact that the ingredients are more expensive and of higher quality but also due to low volumes of production and the according infrastructures. However, it is believed that with time passing by this can be improved and also that many green consumers are aware about the product features and are willing to pay for this.
Sania Productos Ecológicos	The price is seen as an obstacle as many people compare, but it is stated that conscious clients are more willing to pay the price differential and do not compare too much with conventional products. But besides the price it is also highlighted that the lack of knowledge is also a big issue when referring to the consumption of ecological products. Some people do not know about the product features and others have doubts about their credibility.

Source: Author's own elaboration.

The proposition five is confirmed. The price is especially an obstacle for those consumers who do not consume ecological products, and lack knowledge about the attributes of an ecological product. When aiming for expanding the market, the objective is to turn non-ecological consumers into consuming ecological products. However, many of the interviewed persons state that the price is higher than the price of conventional products, but they also highlight that, there is also willingness to pay for the distinct product attributes as the consumers of ecological products are mostly aware about the specific attributes and the ecological product is associated with a higher quality.

Table 8. Propositions regarding place.

6. Short distribution channels are predominant in the distribution of ecological products due to the preference of local products and suppliers.	
Supermarket El Corte Inglés	The majority of ecological products come from local or national producers and distributors. Some of them are imported from international producers, but it has been noted that there has emerged a tendency to consume local products. However, the distribution is not always short as there might be various distributors between the point of production and the point of sale.
Carrefour Market Bilbao	A total of 95% of the ecological products comes from Spain whereas 5% are imported products. Thus, there is a tendency to keep the distribution channel short whenever it is possible and to obtain the products from local suppliers. In this case, the tendency to consume local products is higher than in the case above.
Naturalis	In this case, more than half of the products are from Spain. The imported products basically come from member states of the European Union and especially non-food products and processed foods might come from these other countries. The fresh products such as vegetables, fruits and milk are exclusively from local producers. The offer of fruits and vegetables is seasonal. Concerning these fresh products, distribution channels are quite short. The non-food products and processed foods often show longer distribution channels. The owners in this case have highlighted their preference to offer local products whenever it is possible and have marked the "km 0" in the store to emphasize the origin of the products.
Sania Productos Ecológicos	The majority of the products are from Spanish territory. Between 3-8% of products are imported. However, the imported products are not only from the European continent but rather global. As an example, there can be found mate tea and quinoa, both coming from the South American continent.

Source: Author's own elaboration.

The sixth proposition is partly confirmed. The majority of the cases included have mentioned their intention to offer the highest possible proportion of products from a local or national origin. Especially, fresh products have shown a tendency to come from local suppliers. Other processed products or especially ecological cosmetics are often imported from other countries due to certain brands, which are well established in the green market.

Table 9. Propositions regarding promotion

7. Recommendations of sellers can be a crucial point to convince the consumer about the features of ecological products.	
Supermarket El Corte Inglés	It is believed that the green consumer is already well-informed when accessing the store and no recommendations are needed. However, on the website further information can be found.
Carrefour Market Bilbao	Few recommendation is done. The main recommendations can be found on the website of the store including recommendation of so-called “influencers” which is in line with tendencies.
Naturalis	The recommendations and experiences of the owners are highly appreciated by clients due to the fact that the owner on the one hand has been a green consumer during a long period of time and thus has been in the situation of the consumer as well and on the other hand the owner provides plenty of information about the different features of products as well as nutritional information.
Sania Productos Ecológicos	Also in this rather small specialty retailer, the recommendation is crucial. The owner consumes ecological products himself and thus can help on purchasing decisions based on his own experiences. But there is less of the comprehensive information given about the products.

Source: Author’s own elaboration.

The seventh proposition is partly confirmed. Recommendations or experiences on ecological products are found to be appreciated by consumers. This can be explained by the fact that, there is often a lack of knowledge about ecological products and their features. Hence, it can be convincing to know about the positive experiences of others. However, in the case of the supermarkets, it is believed that these recommendations are not necessary as the ecological consumer often accesses the store being informed about the products they are looking for, or as well, they can access the information which is available online. But, the opinions of the specialty retailers are not in line with that. For this reason, the proposition cannot be completely confirmed.

Table 10 sums up the total results and the individual results for each store regarding each proposition.

Table 10. Results of the propositions

Propositions		CorteInglés	Carrefour	Naturalis	Sania	RESULT
Consumer	1. The green consumer is health-conscious and is pursuing a healthy lifestyle.	YES	YES	YES	YES	Confirmed
Strategy	2. Supermarkets and small specialty retailers pursue different strategies for positioning their products.	YES	YES	YES	YES	Confirmed
Product	3. The assortment of ecological products has been growing in the last years and it is expected to continue expanding in the different types of retailers in the next years.	YES	YES	YES	YES	Confirmed
	4. The assortment of ecological products in supermarkets is wider than that of specialty retailers.	YES	NO	NO	NO	Not confirmed
Price	5. The price is a crucial impediment for expanding the consumption of ecological products in the Basque Country.	YES	YES	YES	YES	Confirmed
Place/ Suppliers	6. Short distribution channels are predominant in the distribution of ecological products due to the preference of local products and suppliers.	No	YES	YES	YES	Partially confirmed
Promotion	7. Recommendations of sellers can be a crucial point to convince the consumer about the features of ecological products.	NO	NO	YES	YES	Partially confirmed

Source: Author’s own elaboration.

4. Conclusions

This study aimed to explore the distribution of ecological products, and bring insights to the ecological businesses of two types of distribution, big supermarkets and small specialty stores.

Health has been a crucial motive for the consumption of ecological products, it has also been confirmed that especially price, but also the lack of knowledge about the ecological product, have been identified as main principle obstacles for the growth of the green market.

For the supermarkets, it could be an opportunity to expand their product range, but also to deepen it, since the consumer gets more exigent regarding the quality of the purchased products. Thus, it might be beneficial to increase the level of specialization of the product range, and also to increase the promotion of products in-store. The small specialty retailers should focus on their advantages, offering a good customer service and close contact to the consumer, and having a deep product range, which satisfies, especially the consumers which are more specialized and exigent about ecological products and ecological standards.

The gap between ecological production and consumption might be narrowed in a near future through a higher availability and accessibility of ecological products provided by different types of retailers, who are able to adapt their supply of ecological products to current trends through different strategies of positioning.

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