

Through the Lens of Food Retailers: Promoting Healthy Food Environment for Safe and Affordable Diets

Dr. Elaine Q. Borazon

Assistant Professor, National Sun Yat-sen University
Principal Investigator - SEAOFE Philippines



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Dr. Elaine Q. Borazon

Assistant Professor
International Graduate Program of Education and
Human Development, NSYSU

Research interests: Food environments, sustainable
development, supply chain management, and
entrepreneurship



The SEAOFE Study

Aim

To improve understanding of the **retail food environment**, **consumers' and retailers'** perspectives on factors influencing their food retail-related decisions, as well as the existing **national-level policies and actions** influencing food retail in SEA

Objectives

1. To analyze the characteristics of the national **food retail landscape** in Malaysia, Indonesia, the Philippines, and Thailand.
2. To explore the **consumer** experience of their retail food environment, and to assess the **retail food environment** in selected urban poor areas.
3. To analyze **retailer decision-making** relevant to selling healthier food in urban poor areas.
4. To analyze the **policy landscape** relevant to the national retail food environment.

Countries

Indonesia



Malaysia



Philippines

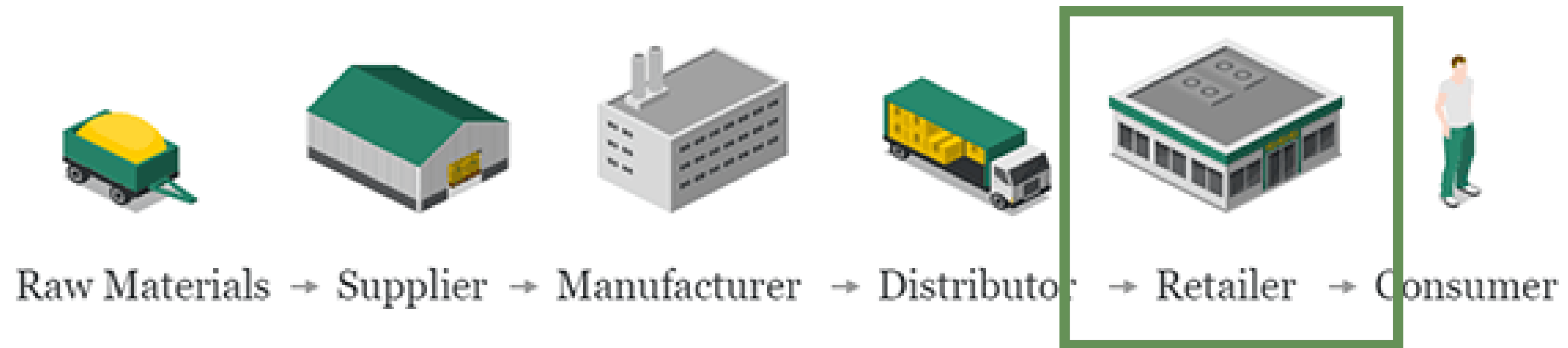


Thailand



Retailers depend on the product supply and availability from the suppliers.

Supply Chain Diagram



















Retailers act as the middlemen between suppliers and consumers

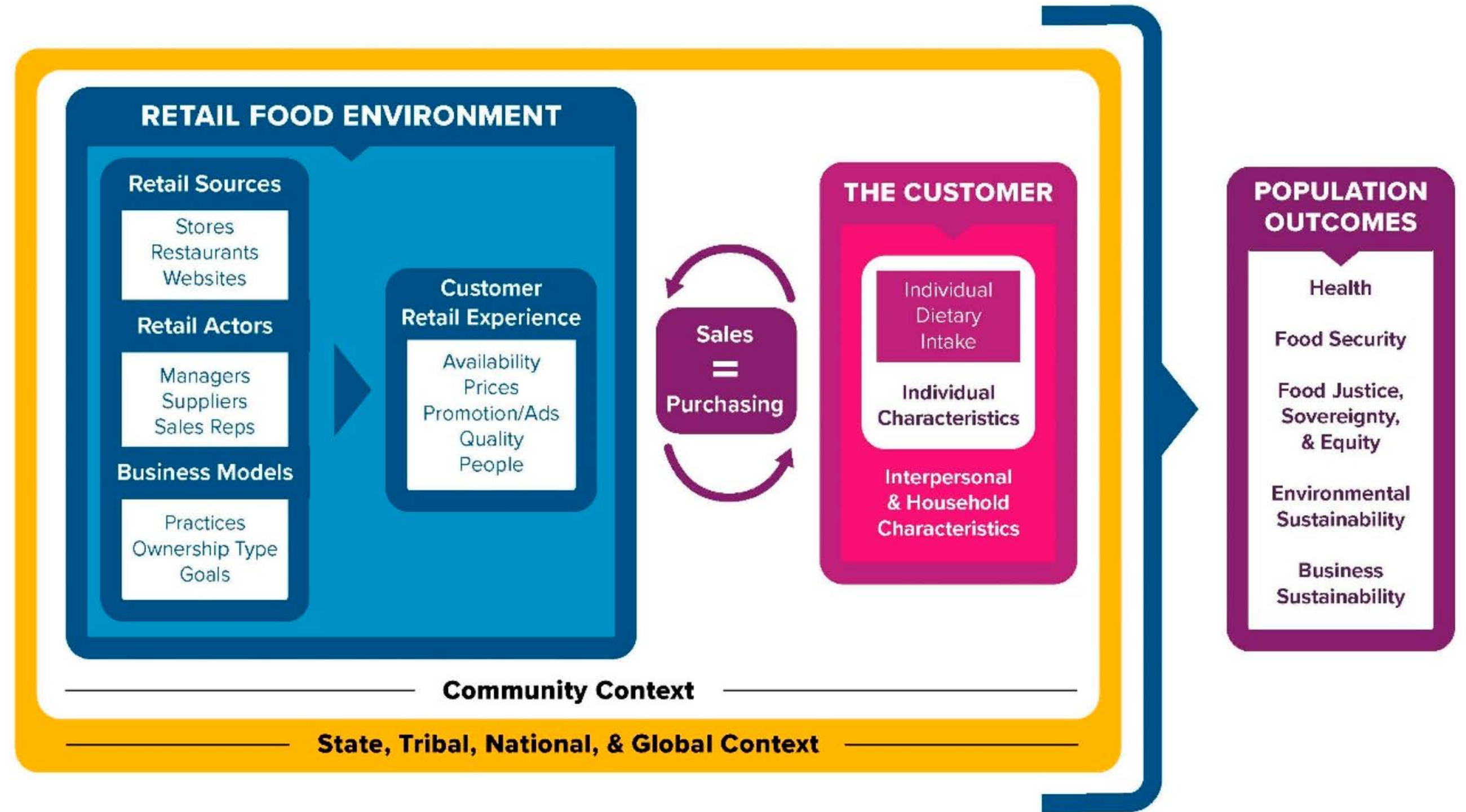
Types of Food Retail – Traditional

Name	Indonesia	Malaysia	Thailand	Philippines
Traditional market <i>has varied opening hours: all day, only night or only morning</i>	 Pasar tradisional	 Pasar borong/pagi	 Floating market	 Palangke
Grocery store <i>sells packaged food with other daily needs</i>	 Toko kelontong	 Kedai runcit	 Grocery store	 Sari-sari store
Mobile market <i>the seller use cart, motorbike or car to sell fresh vegetables</i>	 Tukang sayur keliling	 MyGrocer		

Types of Food Retail – Modern

Name	Indonesia	Malaysia	Thailand	Philippines
<p>Convenience Store <i>a small retail business that stocks a range of everyday items</i></p>				
<p>Forecourt retailers <i>convenience store in gas station</i></p>				
<p>Supermarket <i>Retail business larger than convenience stores, but smaller than hypermarket</i></p>				
<p>Hypermarket <i>big-box store combining a supermarket and a department store</i></p>				

Food retailers, manufacturers, and distributors exert **powerful influence on our food choices** through decisions about stocking, pricing, marketing, and promotional practices.



Retail Food Environment and Customer Interaction Model (Winkler et al., 2020)

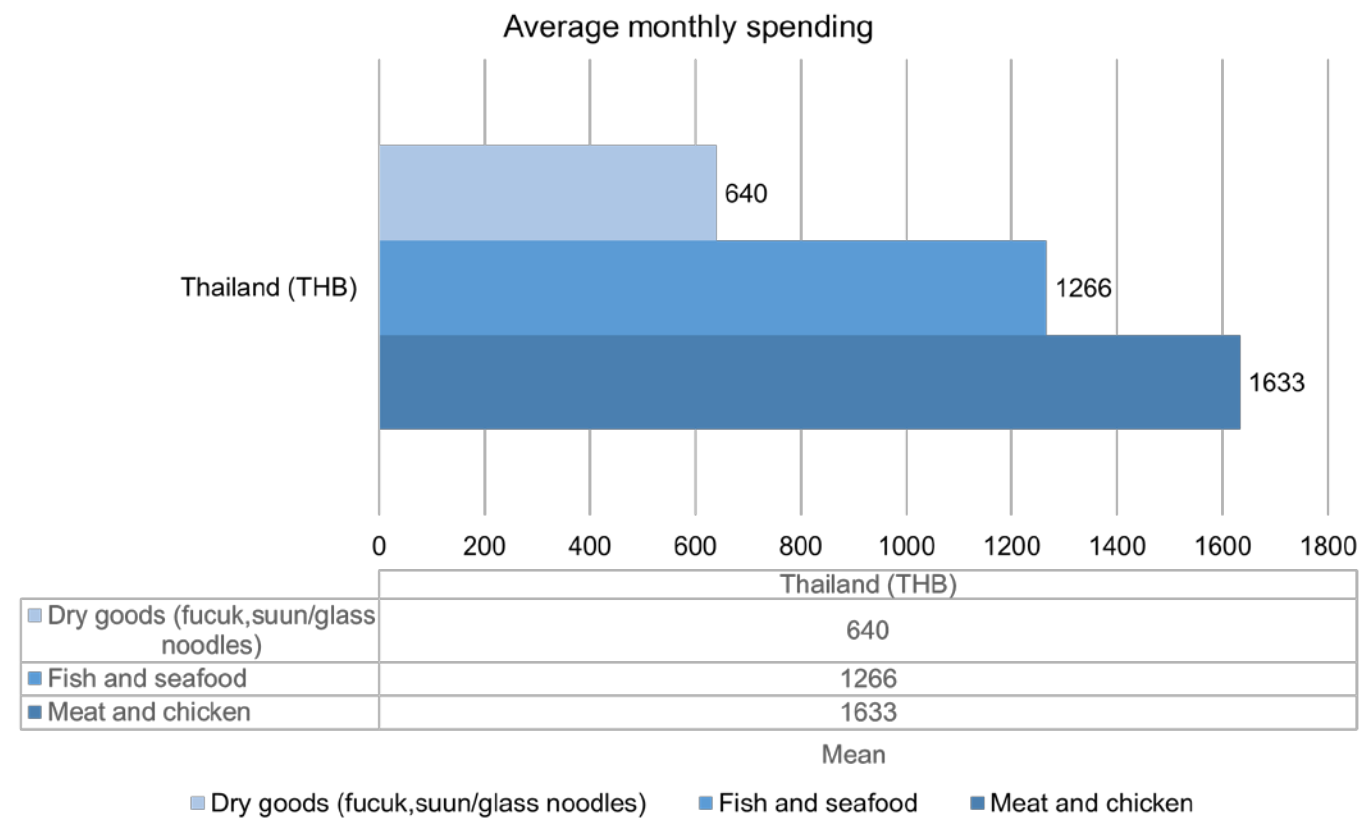
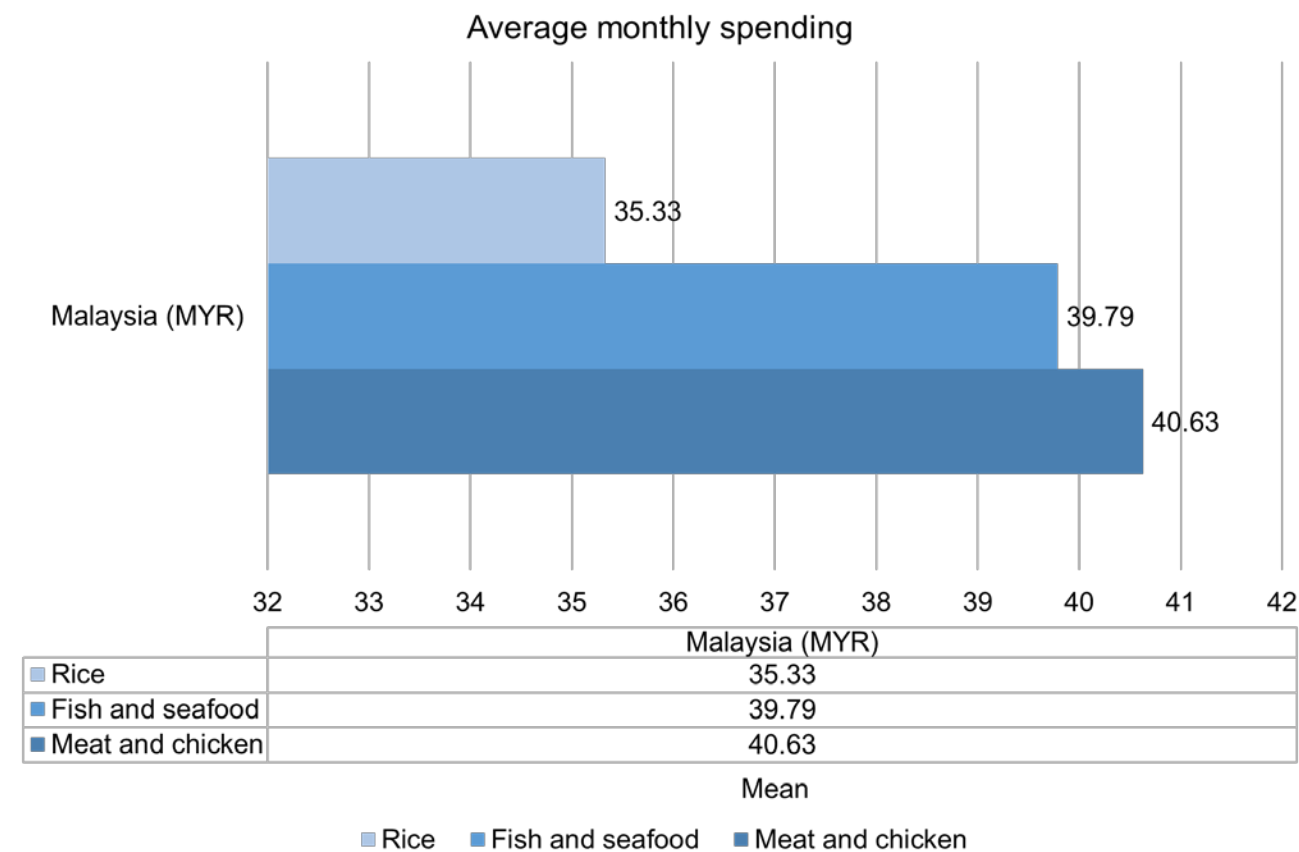
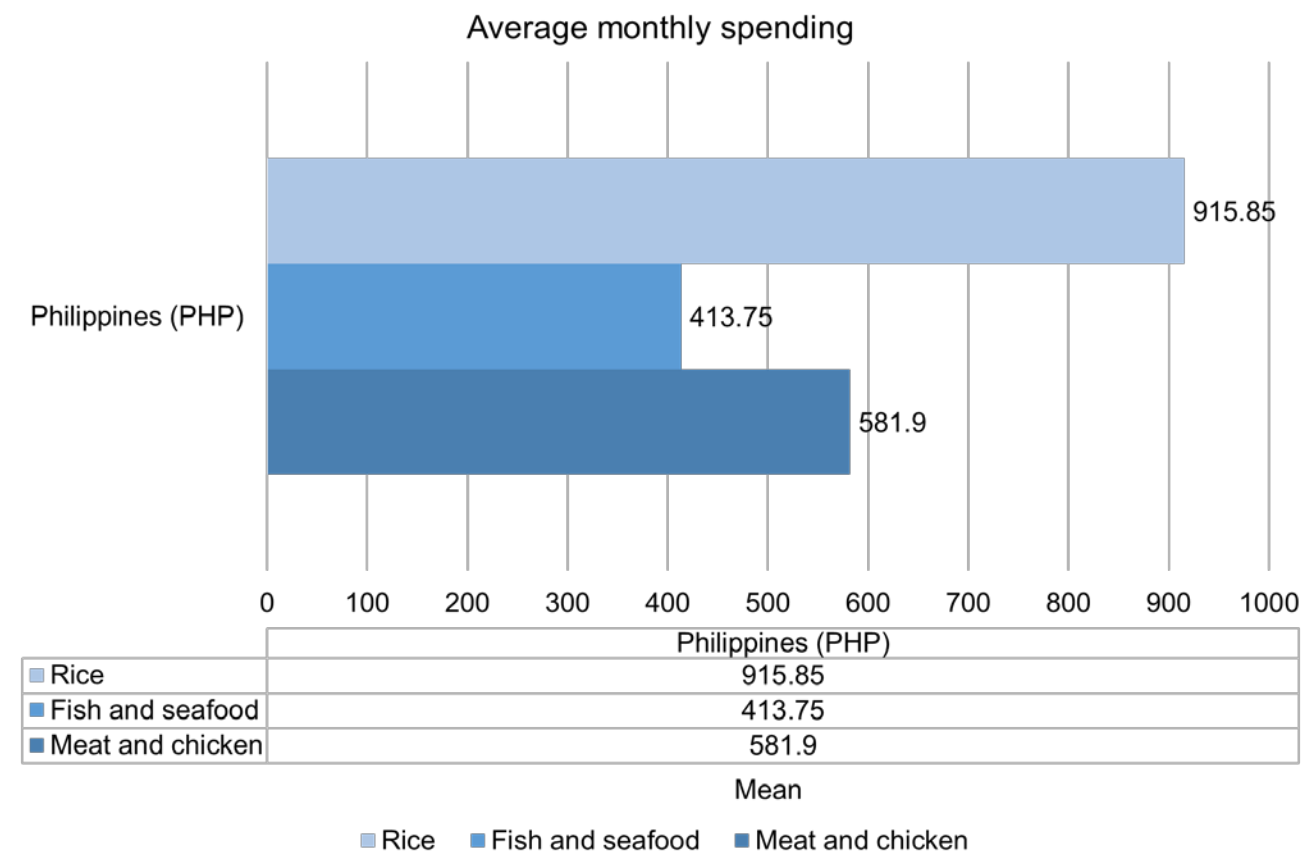
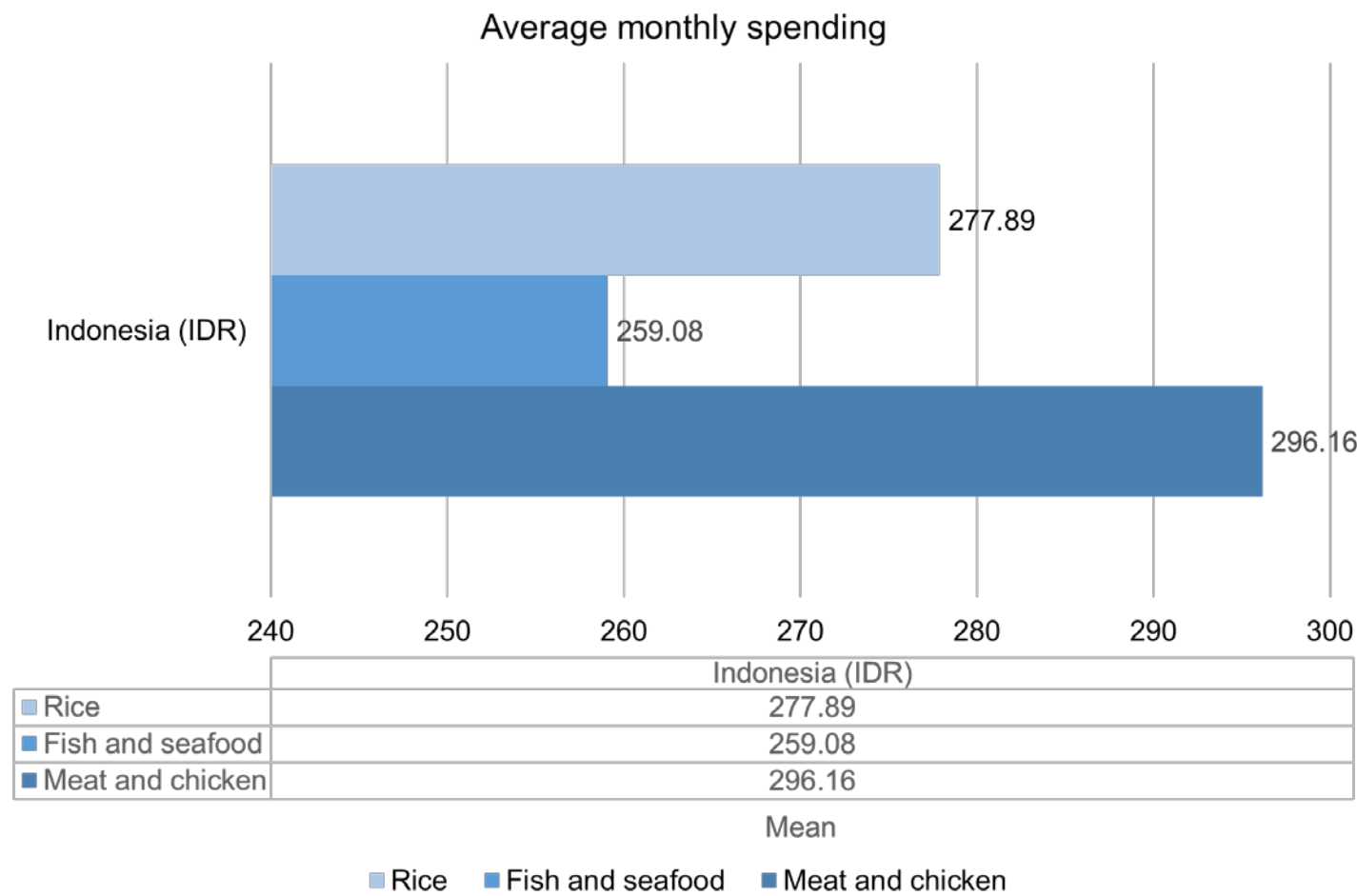
Food retail (ex. Philippines)

Number of Retailers	
Micro (1-9 employees)	59,023
Small (10-99 employees)	991
Medium (100-199 employees)	11
Large (>200 employees)	7
Total Retailers	60,032

Major Players in the Industry	
1st	Supervalu Inc. (SM)
2nd	Robinsons Retail Holdings Inc
3rd	Puregold Price Club Inc.
4th	Philippine Seven Corp.
5th	Metro Retail Stores Group

Sources: Department of Trade and Industry (DTI) 2019, Euromonitor International

Monthly spending on food (Top 3 food items)



Factors influencing food purchase (Top 5)

	Indonesia	Malaysia	Philippines	Thailand
Good quality	√	√	√	
Fresh	√	√	√	√
High nutritional value	√			
Healthy	√		√	√
Food safety	√	√	√	√
Cheap		√		√
Good taste		√	√	√

Retailers' Stocking Decisions: Informants' profile

Country	No. of informants	Type of retailer	Years in operation	Firm size	Ownership type
Indonesia	24	Traditional	>14	Micro	Local
Malaysia	16	Modern	>2	S,M,L	Local/Foreign
	19	Traditional	>2	Micro	Local
Philippines	18	Modern	>8	L	Local/Foreign
	30	Traditional	>2	Micro	Local
Thailand	14	Modern	>10	S,M,L	Local/Foreign

Themes	Malaysia	Philippines	Thailand
Barriers to stock healthier food/beverage	Expensive price Lack of consumer knowledge and awareness	Expensive price Lack of consumer knowledge and awareness Availability Expensive cost of supply Shortage in supply Lack of consumer demand Taste Profitability Consumer's income Poverty Low consumer demand Consumer preference and perception Low shelf-life	Expensive price Availability

Modern Retailers

Themes	Indonesia	Malaysia	Philippines
Barriers to stock healthier food/beverage	<ul style="list-style-type: none"> Availability of supply Shortage in supply Low shelf-life 		
	Expensive price	Expensive price	Expensive price
	<ul style="list-style-type: none"> Consumer demand and preferences 	<ul style="list-style-type: none"> Low shelf-life 	<ul style="list-style-type: none"> Low shelf-life Availability of supply Consumer preference Product substitutes Slow product movement Profitability Taste Consumer profile

Traditional Retailers

Implications to Healthy Food Retail: Price as a key factor

High retail prices of healthy products

limited availability, perishability, transport, and storage costs

Low consumer demand due to limited income of consumers

Retailers limit stocking of healthy products

Government policies affecting food retail system

Role of local and national government in the food retail system

- Many cannot mention policies related to healthier food retail
- **Mostly on price regulation and monitoring**

Local/national government support

- None

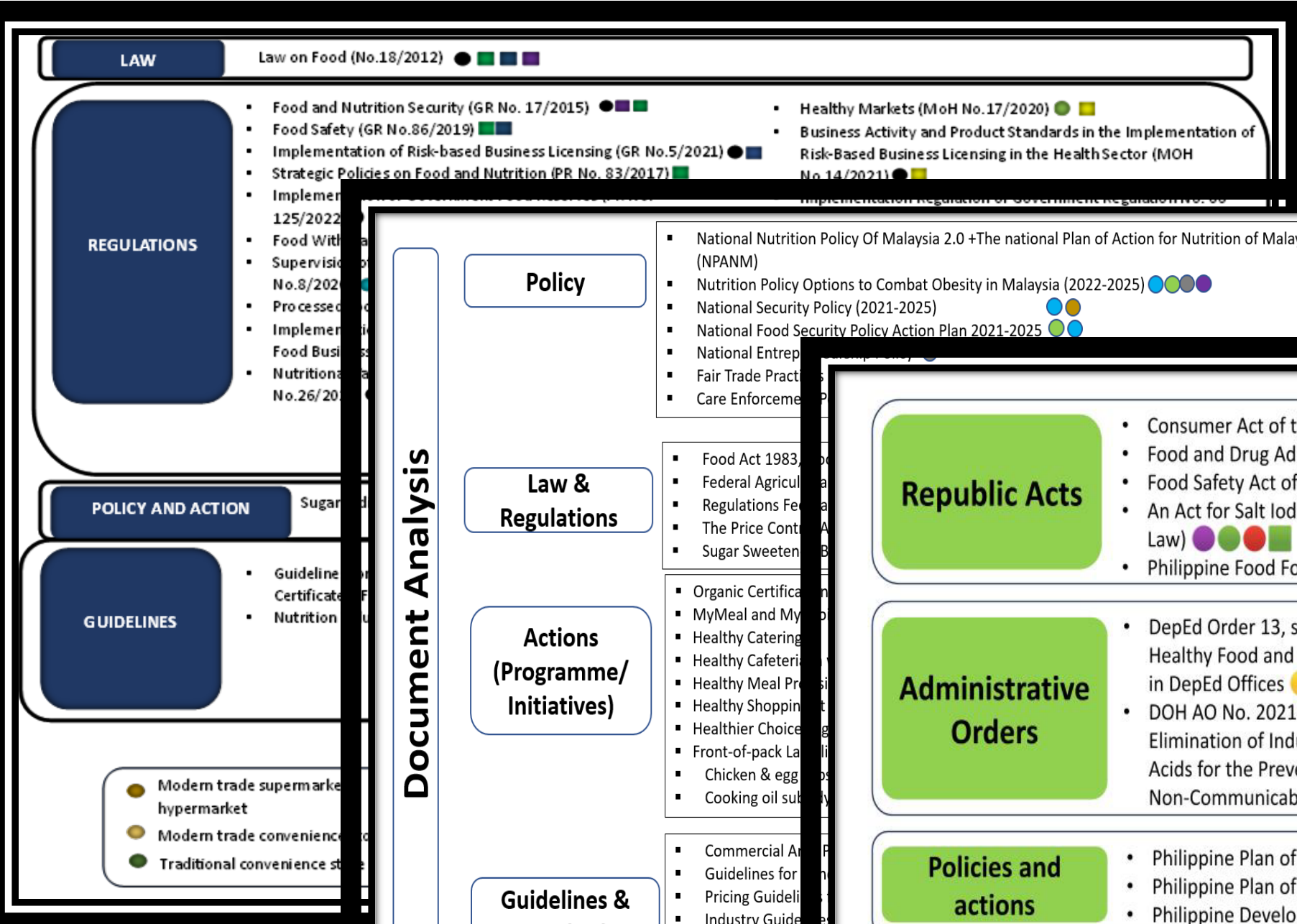
Incentives to promote healthy food environments

- No form of support or incentives from the government to sell healthier food or to promote a healthier food environment.

Platform for collaborations

- Retailers are willing to collaborate with the government if there are programs.

Food Retail Policy Landscape



Indonesia

Malaysia

Philippines

Thailand

Republic Acts

- Consumer Act of the Philippines
- Food and Drug Administration Act
- Food Safety Act of 2013
- An Act for Salt Iodization Nationwide (ASIN Law)
- Philippine Food Fortification Act

Administrative Orders

- DepEd Order 13, s. 2017: Policy and Guidelines on Healthy Food and Beverage Choices in Schools in DepEd Offices
- DOH AO No. 2021-0039: National Policy on the Elimination of Industrially-Produced Trans-Fats and Acids for the Prevention and Control of Non-Communicable Diseases

Policies and actions

- Philippine Plan of Action for Nutrition 2017-2022
- Philippine Plan of Action for Nutrition 2023-2028
- Philippine Development Plan 2023 – 2028

Local Ordinances

- Quezon City Anti-Junk Food and Sugary Beverages Ordinance
- Healthy Food Procurement Act

- Type of retailers**
- Retail establishments (modern/traditional)
 - Restaurants/food outlets
 - All types of food businesses
 - Food manufacturers

Laws

- Food Act, B.E. 2522 (1979)
- Public Health Act, B.E. 2535 (1941) Amended B.E. 2560 (2017)

Regulations

- Ministerial Regulation on Food Selling Place Hygiene B.E. 2561 (2018)
- Ministerial Regulation on Control of Business that Harms to Health B.E. 2560 (2017)
- Notification of MOPH (No. 237) B.E. 2544 (2001). Re: Labelling of Ready-to-Cook Foods and Ready-to-Eat Foods
- (No. 367) B.E. 2557 (2014) Re: Labeling of Prepackaged Foods
- The Bangkok Metropolitan Administration (BMA) Ordinance re Food or Ice Retail in Private Places Control B.E. 2518 (1975)
- Hawkers Control B.E. 2519 (1976)
- Street Stalls Control B.E. 2519 (1976)
- Selling in Public Places and Footpaths B.E. 2545 (2002)
- Markets B.E. 2546 (2003)
- Food Selling Place and Food Storage B.E. 2565 (2022)
- Local Ordinance re Food Selling Place and Food Storage

Policies and actions

- Clean Food Good Taste
- Clean Food Good Taste Plus
- Nu Nitch Restaurants Star
- Q / Organic Thailand Product Corner
- Q Restaurants
- Street Food Good Health
- Healthy Market
- Go Green Plus
- Pracharat Market (Green Market)
- Farmer Market
- Less Sweet Order
- Local Food and Farm Co-operatives
- Healthier Choice Gift Baskets
- Bangkok Street Food

Guidelines / Standards

- Clean Food Good Taste Standard
- Clean Food Good Taste Plus Standard
- Healthy Market Standard
- Street Food Good Health Guideline
- Food Sanitation Rules/Standard
- Thai Industrial Standard
- Healthy Menu Guideline
- Market Standard
- Q Standard
- Healthier Choice Logo Guideline
- Bangkok Food Safety Standard
- Occupational Standards (for restaurants, cafés)
- Good Manufacturing Practice (GMP)
- Good Agricultural Practice (GAP)

Types of retailers

- Modern trade supermarkets / hypermarkets
- Modern trade convenience stores
- Traditional convenience stores
- Fresh / wet markets
- Street food – hawkers, stalls, carts, trucks
- Co-op
- Restaurants
- Cafes / coffee shops
- All types of food retailers

Nutrition / health objectives

- Nutrition (N)
- Food safety (FS)
- Hygiene & sanitation (HS)
- FS + HS
- N + FS + HS

Facilitators to Policy Change and Policy Opportunities

Availability of direct and indirect policy interventions and incentives

Several policies support healthier food retail: food pricing, labeling, and composition.

Facilitators to Policy Change and Policy Opportunities

Availability of direct and indirect policy interventions and incentives

Policy incentives (fee waivers and tax breaks) were seen as effective in accelerating implementation and encouraging compliance

Facilitators to Policy Change and Policy Opportunities

Stimulating consumer awareness and demand for healthy diets

Raising public awareness about nutrition helps drive support for healthier food retail policies by enabling informed choices. Retailers, responding to consumer trends, increasingly support policies promoting healthier options as demand for healthier lifestyles grows.



Barriers to Policy Change and Policy Opportunities

Nutrition as low priority queue

Governments have implemented limited food retail policies, mainly targeting food safety, hygiene, and stunting rather than overnutrition.



Barriers to Policy Change and Policy Opportunities

Government silos

Silos across government agencies are observed across four countries.

Absence of a designated authority or agency and a lack of commitment to policies promoting healthy food retail for better nutrition



Barriers to Policy Change and Policy Opportunities

Corporate power

Stakeholders identified corporate power, evident in lobbying, advertising, and supply chain control, as a key barrier.



Barriers to Policy Change and Policy Opportunities

Complexity of food supply chain

Complex food supply chains pose challenges to healthy food retail policies, driving up fresh food prices, lowering processed food costs, and causing inconsistent availability and distribution

Opportunities for Policy Changes

strengthening
coordination
mechanisms

developing
alternative policy
options to
promote a
healthier food
retail
environment

empowering
consumers for
healthy retail
food choice

promoting
corporate
accountability for
healthy food
environments

framing the
inter-linkages
between retail
and nutrition

CALL TO ACTIONS

Products

Increase stocking and availability of healthy food options

Do strategic placement or highlighting of healthy food options

Limit sweets or confectionery at checkout counters



Retailers can...



Marketing

Create marketing campaigns to highlight healthy food

Offer discounts or free samples of healthier food products

Ensure that nutrition information and labels are displayed

Collaborations

Support the call for healthy food environments

Collaborate with nutrition and health-related projects by the government, health organizations, and academe

Attend workshops, forums, or seminars on healthy food environments



OUR NEXT STEP

*Do you want to be
part of the change?*

*Join us as we create healthier
food environments!*



“Harvesting Knowledge, Cultivating Change”

SHAPE-Asia’s Vision:

Shaping Healthy Asian Food Systems and Policy Environments



International Graduate Program of
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Thank you!

Dr. Elaine Q. Borazon

Assistant Professor - National Sun Yat-sen University
elaineqborazon@gmail.com / elaineqborazon@mail.nsysu.edu.tw