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► To cite this version:

Sebastian Billows, Elizabeth Carter, Marc-Olivier Déplaudé, Loïc Mazenc, Geneviève Nguyen, et al.. Reconquer and divide: comparative standard-setting strategies among producer organizations. Agriculture and Human Values, In press, 10.1007/s10460-024-10671-3 . hal-04821902

HAL Id: hal-04821902

<https://hal.science/hal-04821902v1>

Submitted on 5 Dec 2024

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Reconquer and divide: comparative standard-setting strategies among producer organizations

Sebastian Billows¹ · Elizabeth Carter² · Marc-Olivier Déplaudé³ · Loïc Mazenc⁴ · Geneviève Nguyen⁵ · François Purseigle⁵ · Annie Royer⁶ · Allison Loconto⁷

Accepted: 28 October 2024
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Abstract

Food standards, which are used to signal adherence to sustainability goals or a specific origin, have deep political implications. Standards crafted by retailers, processors, or third-party actors such as non-governmental organizations (NGOs) often disempower farmers. Moreover, due to the liberalization and globalization of many food value chains, producer organizations (POs) lost some of their legal privileges and market protections. This paper analyzes how POs in the Global North sought to regain their control over food markets by establishing their own standards. These strategies and their consequences are considered across three dimensions: the internal life of the PO, the relevant market institutions, and the relationship between the PO and the state. Our case studies ($N=5$) performed in France and in Québec, a French-speaking province of Canada, span across a variety of food sectors. Drawing on qualitative material, we designed our explanatory framework through an abductive, iterative method. Although standards crafted by POs have, in some cases, reshaped market institutions to their advantage and have repositioned them in the governance of food markets, they come at a cost. They may create tensions within POs and clash with the agrarian values of solidarity, democracy, and autonomy. Overall, this article challenges the assumption that food standards are mainly governed by private actors and sheds light on the new alliances and new identities of POs.

Keywords Producer organizations · Food standards · Market institutions · Governance · Sustainability

Introduction

Food standards, which are now ubiquitous, have developed through successive waves (Bain et al. 2013:2). An early wave saw the development of standards guaranteeing the uniformity, consistency and safety of products (e.g., premium meat and dairy grades). In the past few decades, standards have started focusing on social, ethical, and environmental issues. This trend has been fueled by a growing concern for various social issues and a greater segmentation of the demand-side of consumer markets (Wolf et al. 2001). A new “economy of qualities” (Callon et al. 2002) has emerged through the labelling of products, which makes claims regarding how food products are made and processed (Laurent and Mallard 2020). At a broader level, the rise of new standards goes together with the rise of new forms of valuation and new market linkages that challenge the industrial market convention (Ponte 2016). However, instead of overturning the industrial food system, the proliferation of standards that aim to cover this wide range of qualities has

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led instead to the hybridization and the mainstreaming of the “quality turn” (Goodman 2003) among the industrial actors, where new claims such as “GMO¹-free” or “antibiotics-free” blur the line between conventional and alternative forms of agriculture.

Despite flimsy contributions to sustainability goals, this new wave of food standardization has had a deep political impact. Setting and enforcing a food standard “disciplines, reorganizes, and transforms not only the thing that is standardized but all those persons and things that come in contact with it” (Busch 2000:281). While second-wave standards have been heralded as a new form of non-state governance (Cashore 2002), which allows non-governmental organizations (NGOs) to push their agenda on the global stage (Bartley 2018), they have compounded inequalities across value chains. These standards were typically first driven by NGOs, but then increasingly by multi-stakeholder initiatives whereby NGOs worked closely with large, multinational brands to certify their supply chains (Cheyns and Riisgaard 2014). Existing studies have provided various illustrations of such imbalances (Dolan and Humphrey 2000; Tran et al. 2013). In key commodities such as coffee, it is typical for large manufacturers to establish their own quality standards, where supply chain security is prioritized over the values of “economic, social, and environmental sustainability” (Renard 2022). Supermarkets, which develop their own brands, have also become key players in shaping the dominant food standards. The standards they impose reduce “multifaceted societal demands” to arbitrary criteria that only the most industrialized producers can meet (Schermer 2022). Producers face a double bind: they must strive to conform to norms they have little control over while operating in difficult economic conditions (Guthman 2017).

This paper analyzes attempts made by producer organizations (POs) to craft their own standards and to thus maintain farmers’ power in the value chain. While POs’ agency in the implementation of multiple standards has already been documented (Arnold and Loconto 2021), we pose the research question of: *why do POs try to set standards themselves and what are the effects of such strategies?* We define a PO as a formal entity controlled partly or jointly by producer-members that plays a significant role in the supply chain. Like many farming co-operatives, they market and/or process the products of their members. Due to their historical role in maintaining “market autonomy” (van der Ploeg and Schneider 2022), we can expect POs to constitute the main vehicle by which farmers craft their own standards.

We analyze three dimensions of POs’ standard-setting strategies. The first looks at the internal implications and teases out the trade-off between the establishment of

successful standards and POs’ conformity to their alleged values of autonomy, solidarity and democracy. The second dimension views standards as a way to redefine the valuation of products and to capture market power, applying the “markets-as-fields” perspective (Fligstein and McAdam 2012). This framework conceptualizes markets as an arena shaped by socially constructed norms—such as cultural norms, social patterns, and institutional contexts—instead of one driven purely by economic rationality. Extending the “tripartite standards regime” framework (Loconto and Busch 2010), our third analytical dimension focuses on how standard-setting reconfigures the relationship between POs and state authorities.

To date, the scientific literature on how producers handle standards is limited to two types of cases. The first consists of POs located in the Global South selling products whose end consumers are in North America and Western Europe (Arnold and Loconto 2021; Coslovsky 2014). In these cases, POs are unlikely to have the resources to engage in standard-setting themselves. Those that have them are typically focused on building local markets or are apex organizations that have emerged from within the international sustainability standards movement (Loconto and Hatanaka 2018; Renard and Allison 2013). The second type of PO addressed in the literature is based in the Global North. These are usually small-scale initiatives, where the POs develop a standard to promote alternative forms of farming, processing, and marketing (Dufeu et al. 2020; Lamine and Rouchier 2016; Niederle et al. 2020; Paranthoën 2022). Those standards aim at bringing together a group of producers who are at the fringe of conventional agriculture so to build more-than-market ties between producers and consumers. Rather than POs in the Global South or fringe producer groups, we focus on POs in the Global North that are broad-based and active in the market for conventionally produced food.

To complement Forney (2021), who analyzed standard-setting in the Global North at the level of a single organization in Switzerland, we conducted a multi-case analysis of five POs located in France and in Québec, Canada’s French-speaking province. The cases offer a high level of analytical leverage thanks to the diversity of their production, their sizes, and of their value-chain functions. Our abductive and comparative research design consisted of iterative steps to build and test a common framework that would hold in each case. This process relied on first-hand qualitative data combining interviews and documentary evidence.

In the next section, we elaborate further on our theoretical framework. We then describe the methodology used in our analysis of five POs. Next, we present our findings on standard-setting strategies and their impact both within and outside the organizations. Finally, we contextualize our results by highlighting the dilemmas faced by producer

¹ Genetically-modified organisms.

groups willing to regain control over food markets through standards.

Theoretical framework

Differentiated standards and the hybridization of producer organizations

The worldwide diffusion and expansion of POs in farming started in the second half of the 19th century (Patmore and Balnave 2018:70). POs were already active in the first wave of standardization, which was geared towards industrialization and mass production. We hypothesize that the broad shift, starting from the 1990s, towards food standards emphasizing specific qualities or values poses a new challenge to farmer groups. Nowadays POs use standards as a way to differentiate themselves in an increasingly competitive environment (Forney 2021). This new organizational goal might clash with the core principles that POs claim to pursue. It might accelerate their “hybridization,” whereby POs adopt certain characteristics of corporate enterprises (Bijman et al. 2013; Chaddad 2012; Hogeland 2008).

In the traditional model, POs are geared towards the values of democracy, solidarity, and autonomy (Forney and Häberli 2017), which have roots in agrarian ideology (Hogeland 2015). As alleged democratic organizations, POs operate according to the “one member, one vote” principle (Mooney 2004). This also applies to the producers’ electoral body within interprofessional organizations. Elected board representatives and elected leaders are supposed to have the upper-hand over the executives and employees who are hired to perform vital functions (marketing, sourcing, advisory services etc.). POs are also built around the value of solidarity. They are expected to be market competitive, but to limit competition among PO members. In France, some POs require members to market all their production through them. In exchange for this exclusive relationship, profits are shared among members based on their output. A third value is that of autonomy. Farmers’ independence and freedom from the domination of big actors in the agri-food industry is a central principle underlying the rise of POs (Hogeland 2015). Autonomy is understood here as a relational concept (van der Ploeg and Schneider 2022). It emerges only when and where actors have struggled to move beyond their dependency on others—particularly financial dependency or following the goals set by influences (e.g., buyers, NGO labels) that are external to the PO.

As agricultural markets become less protected by the state and as competitive pressures grow, producer organizations need to adopt new commercial strategies and raise more equity capital (Bijman et al. 2013). In the Dutch landscape,

some cooperatives dissociate the farmer association from the cooperative firm (*ibid.*). Managers and external experts are appointed as board members. In other countries, some cooperatives create subsidiaries and invite non-members to invest in them (Chaddad and Cook 2004). Although these new organizational forms seem to have helped POs achieve a more diversified product portfolio, Bijman et al. note a tension between these changes and the demand for “transparency” that is inherent to the cooperative model. Describing similar cases in the Swiss context, Forney and Häberli (2017) claim that such organizational changes can be compatible with cooperative values, as long as they reinforce the control of the farming sector over the rest of the value chain. This paper will advance the discussion on the nature and the consequences of the current wave of “hybridization” of POs by linking this movement to standards. How do POs’ attempts to set their own standards affect their alleged values of autonomy, solidarity, and democracy?

Reshaping market institutions

Standards provide criteria and rules “to measure a product, person or service’s performance or specific characteristics” and thus allow to classify things in categories, creating “uniformities and equivalences between people and things” (Bain et al. 2013). Such categorization is crucial in the qualification of food products put on the market. The standards adopted or set by POs are part of the “market assemblages” that hold agri-food markets together (Callon et al. 2002; Le Velly and Dufeu 2016). They connect the internal life of producer organizations with the market environment in which they operate. In so doing, they contribute to the POs’ role as intermediaries between producers and buyers in a supply chain (Groot-Kormelinck et al. 2022). Bernard de Raymond (2011) showed how standards were strategically used by POs in postwar France in their fight against middlemen and the market’s alleged opacity. By standardizing the grades and qualities of fruit and vegetables, producers were able to shift from traditional wholesale markets to anonymous, electronic “clock auctions” that brought them greater transparency and fast sales. Rather than achieving product uniformity or the expansion of markets, we claim that POs now use standards differently. Standards have the potential to “infuse value chains with value-laden qualities” (Loconto and Arnold 2022) that go beyond economic value per se (Beckert and Aspers 2011).

How can standards reshape food markets? If we apply Fligstein’s (2001) insights to the example of POs and standards, POs are constructed to stabilize markets, and standards are a means to protect incumbent advantage. According to this perspective, markets are governed by institutions which are in turn affected by field dynamics (Fligstein and

McAdam 2012). Field dynamics are shaped by struggles between incumbent market players and challengers. As key market players, POs take part in this struggle. Not only do they fight to maintain their market position, they also try to change the rules of the game to limit price competition and to infuse specific values into the prevailing market norms. Social movements provide a useful analogy to describe this process by which rules of exchange and forms of valuation are transformed by market players and a diverse set of players (Rao et al. 2003). In agriculture, new standards such as “grass-fed beef” have emerged thanks to the mobilization of food critics, pioneering farmers and agronomy experts (Weber et al. 2008). As Carter (2019) has shown with French wine producers of the early 20th century, forging new standards can be a way for POs to bring market norms closer to their own values. However, standards have different “stringency” levels (Reinecke et al. 2012). Some standards, such as GlobalGAP (Bernard de Raymond and Bonnaud 2014), are meant as a baseline and cater to virtually all market participants, while others have the potential to set producers apart from other market players and to shield them, at least temporarily, from price competition (Arnold and Loconto 2021; Carter (2018); Tanaka and Busch 2009). We will see how this dimension affects the ability of producer organizations to reshape market institutions.

Producers and the public-private governance of standards

At a higher level, food markets and standards are embedded in political structures Carter (2018). To analyze the governance of food markets, Loconto and Busch (2010) developed the notion of a “tripartite standards regime” (TSR) that explains how standards govern through standard-setting, certification, and accreditation.

Regarding the evolution of private-turned-public standards, like organic, the current literature describes the following trajectory: early incarnations of standards are value-laden while later versions are more formalized and more auditable. Such integration into the dominant TSR waters down their original political goals (Fouilleux and Loconto 2017). Existing work on POs’ roles within the dominant TSR insists on the tension between bottom-up “learning processes” and the reification brought about by certification performed through “boxes to tick on forms” (Forney 2021). In the context of large POs that are mainly active in conventional agriculture, standards are set in an instrumental way. While they can be used to project values on the market, they are not necessarily viewed as the reflection of the deeply-held values of the membership. Therefore, we focus on standard-setting rather than on certification and

accreditation, which are secondary concerns for the larger POs that are involved in food standards.

How can POs establish themselves as legitimate standard-setters? So far, the literature on standards has insisted on the private-sector dynamics, describing for instance the rise of third-party certifiers (Hatanaka et al. 2005). Cashore (2002) views standards as a form of “private governance:” the legitimacy underpinning standards does not come from the state but rather from NGOs, consumers and businesses. However, despite the globalization of agri-food chains and market-oriented policies (Fouilleux 2003), state authorities are still active in areas such as greening agriculture, improving animal welfare or increasing monetary returns for smaller producers (Daugbjerg and Feindt 2017; Erjavec and Erjavec 2020; Esbjerg 2020). Contrary to what the literature on standards might sometimes suggest, there is no clear-cut divide between private standards and state legislation. There are already several cases of state authorities relying on private standards set by processors or retailers in the elaboration of official rulebooks on farming and food processing (Esbjerg 2020; Schermer 2022). Conversely, some standards, such as GlobalGAP, function as a repository for state regulation (Bernard de Raymond and Bonnaud 2014). Moreover, in a process similar to legal endogeneity (Edelman 2016), market players may shape legislation through mass adoption of a private standard. Once it becomes a taken-for-granted feature, it is more likely to be taken up by other market players and eventually by the state.

Data and methods

We adopted an abductive approach (Atkinson et al. 2003) to comparing case studies that emerged from empirical research conducted separately by the authors. In this sense, abduction is “a method of coming to know” (Adams et al. 2009). We organised a series of workshops, beginning with a seminar in January 2022 where the original empirical material from eight cases was presented. Our initial common finding was a shift in the ways producer organizations legitimized themselves. Through the abductive process, we reduced the number of cases to the five included in this paper and narrowed down the argument. Two cases were excluded because they focused partly or mainly on producers located in the Global South and showed different dynamics from the five final cases located in the Global North. Another case on a French sugar beet cooperative was taken away because this sector was less prone to differentiation strategies. Through this process, we made our claims more precise, linking the shift in legitimacy-granting activities to the introduction of second-wave standards (Table 1).

Table 1 Presentation of the cases

Name	Sector and location	Date of creation	Membership	Governance	Value chain functions
Producteurs de lait du Québec (PLQ)	Dairy, Québec, Canada	1983, out of the merger of two marketing boards created in the 1960s	All 4498 dairy producers of the Québec Province (mandatory participation)	The marketing board is governed by the General Assembly of milk producers (110 delegates representing 4643 producers), elected Board of directors (BoD, 10 producers), elected executive council (5 producers) and appointed management staff.	Mandatory marketing board that aims to increase farmers' power by performing technical and commercial functions, such as negotiating with downstream players. Each province in Canada has its own marketing board for milk. It sets a cap on total dairy production, with an individual quota for each producer.
The Marshville Cooperative [pseudonym]	Dairy, Northwestern France	1932	425 dairy farms	The Marshville cooperative is formally governed by an elected BoD. Like PigCoop, the salaried executives have the upper-hand. Between 1932 and 2023, the cooperative had only three managing directors. The turnover for the elected chairman is much higher.	It collects and processes 261 million liters of milk a year, roughly 1% of total French dairy production. Its main products are various types of butter, cream, cheese and baby formula. The cooperative employs 1250 people, mostly in processing and quality control. In 2013, it entered a partnership with a Chinese health and nutrition company, which markets a significant amount of its baby formula.
PigCoop [pseudonym]	Swine, mainly Brittany	1966	About 3,000 pig farms	As a cooperative, PigCoop is formally managed by an elected BOD. The chairman is a pig farmer. In practice, it is managed mainly by salaried executives. Its management is very stable. There have been only 5 chairmen and 5 managing directors since the company was founded.	It is the leading pork producer in France (5.4 million pigs per year, or about a quarter of French production). It expanded both upstream (feed mills) and downstream (slaughterhouses and meatpacking). It now employs over 7,000 people, mainly in its meat processing division.
Demain la Terre (DLT)	Fruit and vegetables, France	2004	24 production, processing and marketing companies, representing around 450 farms	DLT is an <i>association</i> . Although it includes companies of all sizes (individual or networked companies, cooperatives) positioned in different functions in the value chain, the Demain La Terre collective was founded by and is dominated by "firm-like farms" (Purseigle et al., 2017).	Initially, its vocation was to be a "club of entrepreneurs" exchanging ideas on sustainability issues in the French fruit and vegetable sector. In 2007, the PO entered a new phase. It started working on a set of standards to increase the value of the members' production. The first certified products on the market in 2011.
Bureau interprofessionnel des vins de Bourgogne (BIVB)	Wine, Burgundy, France	Acquired its present form in 1960, officially recognized in 1975	66 wine merchants, 16 cooperative cellars, and 3,577 wine-producing estates.	Like other interprofessional councils, the BIVB is a hierarchical regional decision-making body governed by a General Assembly that splits power evenly between wine growers and <i>négociants</i> in a protected agricultural region.	Technical studies on wine production and commercialization, as well as protecting and promoting the concept of Burgundian wine, with a relative emphasis on the latter.

The five final cases are all POs located in the Global North. Although their size varies, they are considered important players in their respective markets and have launched ambitious standard-setting initiatives in the past few decades. Rather than looking at standards as a way to impose alternative forms of production or more-than-market ties with consumers, we situate them within the politics of mainstream food production and processing. The POs we study have set standards with diverse characteristics which stand halfway between conventional agriculture and fringe initiatives. Some convey values related to cultural heritage while others emphasize sustainability and animal welfare.

We cover various sectors of the food market, from dairy farming to fruit and vegetable and wine. The cases

thus allow to compare across different market contexts. Although four out of five cases are in France, each farming sector covered in the paper has its own dynamics. Various TSRs are covered, ranging from privately recognized standards to officially sanctioned geographical indications of origin (Table 2).

Each case study is based on multiple interviews and various written sources. The number of interviews ranges from 3 (for Producteurs de lait du Québec) to 34 (for PigCoop). In some cases, such as Producteurs de lait du Québec and BIVB, interviews were carried out with elected officials and managers within the producer organizations. In others, such as PigCoop and the Marshville cooperative, interviews were

Table 2 Data

	Written sources	Interviews
Producteurs de lait du Québec (PLQ)	Online resources from the national and provincial marketing boards' websites (PLQ and DFC). MB annual reports. New articles related to MB's initiatives.	3 semi-structured interviews with various actors of the dairy supply chain or observer (processors, producers' representative, academia expert).
The Marshville Cooperative	Various documents available at the local state archive (<i>archives départementales de la Manche</i>): minutes of the general assembly, reports written by state officials etc. Internship reports written in the 1960s and 1970s. History book published by the cooperative.	11 semi-directed interviews with current or former members of the cooperative, including the chairman and one vice-chairman. 6 semi-directed interviews with executives and employees in supply management. A semi-directed interview with the executive manager of the cooperative.
PigCoop	PigCoop website and CSR annual reports. History book published by the cooperative.	34 semi-structured interviews with breeder members and salaried executives of French pig producer organizations. Of these 34 interviews, 16 were carried out with farmers and managers of PigCoop, including the chairman, another member of the board of directors and 2 salaried executives.
Demain la Terre (DLT)	Online resources from the DLT website and report written by the ministry of agriculture.	Participation in a meeting of technical advisors from "Kultive" (a DLT member company). 4 interviews with the first director of the DLT association. A semi-structured interview with the owner of "Rougeline", a DLT member company. 11 semi-structured interviews with employees of "Val de Sérigny", a DLT member company. An interview with the owner of "Planète Végétale", a DLT member company.
Bureau interprofessionnel des vins de Bourgogne (BIVB)	Various sources written on <i>climats</i> , including the BIVB's UNESCO Submission, and a book by a member of the Association des climats. Online resources from the BIVB and UNESCO. Contemporary news articles related to the <i>climats</i> initiative.	A 2.5 h long semi-structured interview with the President of the BIVB, and subsequent email questionnaires. 4 semi-structured interviews with BIVB members.

performed both with rank-and-file members and the leadership of the organization.

Findings

In this section, we compare and contrast the standard-setting strategies of the five PO cases. After presenting how each PO embraced second-wave standards to regain market power, we assess the internal and external consequences of these strategies.

Reconquering the market: from generic industrial standards to differentiation

Four out of the five POs we studied were established more than fifty years ago. All four of them took part in the first

wave of standardization, when standards were geared towards the uniformity, consistency, and safety of products. In the 1960s and 1970s, the modernization and the industrialization of the agri-food chain were considered a national priority in France (Dessaux forthcoming) and in Québec (Morisset 1985). With the exception of the Bureau interprofessionnel des vins de Bourgogne (BIVB), which adhered to a *terroir* narrative of quality, the standards established or enforced by POs contributed to the sector-wide industrialization of farm products and homogenization of farming methods. Towards downstream economic players and the general public, standards were justified based on their ability to supply safe and uniform food products in large amounts (Bonneuil and Hochereau 2008). Through their role in producing standards, producer organizations were viewed by political leaders as key partners in the modernization of the agri-food chain (Dessaux forthcoming). The industrialization of the

farming sector was unpopular among many farmers. Letting producer-run organizations take care of this process was a convenient political compromise, especially for the French Gaullist regime (Keeler 1987).

Across Canada, marketing boards were essential pillars of milk safety standards (e.g., bacteria and somatic cells count, residues of antibiotics), with increasing responsibilities since the 1980s (Grenon 2004; Ménard et al. 2022). Marketing boards are POs that market agricultural products on behalf of their producer-members. They become mandatory once a majority of producers of a delimited region and product vote in favor of their creation.² In the early 1980s, the Quebec milk provincial board, the *Producteurs de lait du Québec*, started setting, monitoring and enforcing milk safety standards, standards that have since then always been similar or stricter than those of the State (Grenon 2004). Early on, PigCoop and the Marshville cooperative also enforced standards aiming at making production more efficient and safer. The compensation for each pig delivered by a farmer at PigCoop could be lowered or increased depending on meat quality (mainly carcass weight and muscle/fat ratio). At Marshville, the price paid for each liter of milk depended on the results of lab analyses measuring germs, fat and protein content. In 1986, the cooperative took part in an initiative to establish an *appellation d'origine contrôlée* (AOC) for the local butter and cream. However, the rules for this differentiated product were light. It was enough that the milk was produced in a specific area and that certain processing techniques were not used.

These standards were part of efforts to streamline production at the sector level. *Producteurs de lait du Québec* spoke on behalf of *all* Québec dairy farmers and could thus impose norms to the entire sector. As for PigCoop and the Marshville Cooperative, they relied on industry-wide standards that were set collectively by major stakeholders, including farming unions in the case of milk. In Burgundy wine, BIVB was regional in scope and was committed to local definitions of quality from the start. However, its creation results from an effort to pool together resources and to collectively manage a fragmented landscape consisting of many different wine *appellations* (AOCs) created in the interwar period.

From the late 1990s onwards, the POs we studied started using standards differently. They were faced with the gradual liberalization of the food value chain, which accelerated in the early 1990s with the international trade negotiations leading up to the creation of the World Trade Organization (WTO) in 1995. As we will show below, POs' privileged relationship with state actors was under attack and they had to find ways to survive in a more open, competitive

environment. Early standards were not sufficient anymore. One of their roles was to distinguish streamlined products from those sold through traditional or informal commercial networks (Bernard de Raymond 2011). Once virtually all production put on the market was streamlined, a "market for standards" emerged (Reinecke et al. 2012), where multiple players across the value chain started promoting different ways to qualify food products. To conquer markets in this new competitive environment and to retain their political influence over the food value chain, POs became involved in the creation of second-wave standards showcasing their adherence to social, ethical, and environmental values.

Producteurs de lait du Québec: Over the past decade, marketing boards in the Canadian dairy sector became more involved in implementing standards. From the 2000s onward, new concerns from consumers related to social, ethical, and environmental issues have given rise to new demands placed on agriculture, particularly livestock farming. In 2015, in response to these pressures, *Producteurs de lait du Québec* joined ProAction, a mandatory nationwide certification program for all its members introduced by the Dairy farmers of Canada (DFC), which represents the 10,000 dairy farmers in the country (Les producteurs de lait du Québec 2021). ProAction covers six elements for which production standards were developed: milk quality, food safety, animal welfare, animal traceability, biosecurity, and the environment. ProAction standards were developed by external experts, and regular audits are conducted to monitor their implementation on farms (Les producteurs de lait du Québec 2024).

The incorporation of these standards by milk marketing boards constitutes an adaptation of the supply management system. In a free market, processors can incorporate consumers' demands into milk delivery contracts for marketing purposes. In the Canadian supply management system, processors do not contract directly with producers; all milk produced is "pooled" and sent to the nearest dairy plant. There are no direct commercial relations between producers and processors, the marketing board serving as the exclusive intermediary. Incorporating consumer demands could be seen as a way of addressing this gap. Moreover, the involvement of boards in social standards may also be motivated by the social contract that binds the Canadian dairy sector to the federal government and to consumers. This contract entails the government controlling borders and setting milk prices, while producers limit their production and manage any surpluses. Consumers, in turn, accept a regulated milk market. Maintaining this social contract hinges on consumers and politicians' perceptions of the supply management system. In Québec, and more largely in Canada, the supply management system depends on border control, which is regulated by the federal government. Other Commonwealth

² At least 50% of the producers must participate, with two-thirds of those voting in favor.

countries stripped marketing boards of their powers in the previous decades (Royer et al. 2014) and the free trade agreements signed by the Canadian federal government are putting more and more pressure on the system. The marketing boards' taking into account expanded social concerns demonstrates a willingness to adapt the system to keep it relevant socially and politically.

The Marshville Cooperative: In the late 1990s, which at that time in Europe, was also a context of trade liberalization of dairy products, the Marshville cooperative started adopting new standards aimed at differentiating further its products. Like other dairy processors, the Marshville cooperative feared the consequences of the liberalization of the dairy sector at the European level. The establishment and enforcement of new standards by the PO is also connected to the downfall of regional and national collective negotiation mechanisms over prices and quality grades. At the 1998 general assembly, the managing director laid out a new strategy, that of focusing on high-end products catering to the “multiple and highly diverse expectations” of consumers³. From then on, the cooperative focused on high-end dairy products that could be vaunted on the basis of their conformity with a range of standards and certification mechanisms: *terroir* butter, cream, and cheese, religiously certified milk products, highly hygienic baby formula made out of milk produced in family-sized farms with sustainable practices, etc. In the early 2010s, the cooperative, on its own initiative, requested the rules for the local cream and butter *Appellation d'origine protégée* (AOP)⁴ to be tightened. On top of the geographical origin criteria, new standards relating to farming methods were added: a certain level of grazing became mandatory, certain types of feed, such as urea, were banned, and milk had to come from a herd composed of at least 30% of the local cow breed. The change in this standard was justified on sustainability grounds: the cooperative's official publications present grazing and keeping farms reasonably sized as a way to protect the fragile local landscape of wetlands.

PigCoop: While the Marshville cooperative decided to focus entirely on various lucrative market niches, PigCoop tried to capture the entire spectrum of the pork market. This new policy emerged at the end of the 2000s. The stated aim of this policy was “to sell as many of [their] animals as possible on the French market” (interview with a member of the board of directors). This market was more lucrative and more stable than export markets, but required differentiated

products and an ability to co-opt retailers. Without abandoning the market for basic pork, PigCoop introduced a flurry of new specifications, the most important being “welfare pork” (i.e., non-castrated pigs) from 2012 and “antibiotic-free pork” from 2014. The latter specification itself comprises several levels (antibiotic-free 42 days after birth, antibiotic-free zero days, RFID-chip animal identification). Unlike the “niche” specifications of the Marshville cooperative, which are aimed at consumers with greater purchasing power, these “volume” specifications remain firmly anchored in the conventional, industrial model: production costs must be kept very low. The concern with reconciling differentiation and mass production is reflected in the choice of differentiation strategies that offer technical and economic advantages (such as the non-castration of pigs, which reduces feed costs and health risks) and in rationalization and optimization work at all stages of the pig chain, as the Chairman of PigCoop explained:

It's great to differentiate, but you can't completely deviate in terms of price. So, we have to be as efficient as possible, particularly... in all the stages of the rocket, whether in production or in processing.

Demain la Terre: Demain la Terre, an organization bringing together fruit and vegetable farms, was created in 2004 and quickly focused on the production of specifications typical of the second wave of standardization. Many new members joined this PO out of frustration with more traditional organizations (cooperatives, the fruit and vegetable interprofessional organization, or the Chambers of agriculture), that claimed to represent the sector as a whole. From 2007, the leadership worked on a labelling scheme to tap into what it perceived as a new demand for more sustainable products that were neither organic nor conventional. The association launched a corporate social responsibility (CSR) program for all its members and sold its first certified products in 2011. Demain la Terre's vision of sustainable development is embodied in two “without” technical specifications: one “without undetected chemical pesticide residues” and the other “cultivated without chemical pesticides.” The special feature of Demain la Terre is its close collaboration with three distribution channels—supermarkets, wholesalers and collective catering. While each producer negotiates its own contracts, Demain la Terre negotiates framework agreements with supermarkets offering preferential conditions to its members.

Bureau interprofessionnel des vins de Bourgogne (BIVB): Even the Burgundy wine growers and *négociants*, who were pioneers of quality standards in the early 20th century, started reconsidering their practices. The *appellation d'origine contrôlée* (AOC) wine regulation was

³ Minutes of the 1998 general assembly, 2088 W, box 76, *Archives départementales de la Manche*.

⁴ French *appellations d'origine contrôlées* (AOC) were renamed as *appellations d'origine protégées* (AOP), following an initiative by the European Union to harmonize national protected denominations of origin schemes.

inspired by the Burgundian notion of *terroir*, and Burgundy was a central player in creating the initial AOC regulation in 1919. This place-based protection proved so successful that it inspired the adoption of this (somewhat watered down) tripartite standards regime at the European Union level, through the Protected Geographic Indication. While this validates the French *appellation d'origine contrôlée* model it also makes the field of geographically protected wines even more crowded. BIVB, then, had an incentive to create a new, distinct wine standard to protect its “first-mover” status (Fligstein 1996:660). This new standard was the place-based concept of *climat*. Elite producers introduced a new protected quality standard aligning authenticity, quality, and uniqueness with a new (or “rediscovered”) Burgundian-specific conceptual standard of *climat*. Currently, *climats* refers to 1,247 UNESCO-protected micro parcels, representing approximately 40% of Burgundian *appellation d'origine protégée* production (Personal Interview BIVB, 2023), including all grand cru and premier cru production. At the heart of *climats* is the unique, singular identity of Burgundian vineyards, with an emphasis on an unchanging “authentic” heritage and distinctiveness of place. Whereas *terroir* was about distinctiveness and authenticity, *climats* are smaller, historical, more precisely defined parcels of land unique to Burgundy. These parcels are more unique and hence more valuable than the broader geographical concept of *terroir* (Carter 2023:10).

Reshaping the internal governance of POs: stringency and the distribution of returns

While these standards are designed to consolidate market positions and retain power over the definition of market norms, they have deep internal consequences. As seen in the previous section, the narratives underlying the second wave of standardization view demand as more segmented and make a sharp distinction between differentiated market niches where specific qualities are put forward, and the market for basic commodities where price is assumed to be the main driver of consumer behavior. In some of our cases, these narratives of segmentation and hierarchization directly conflict with the egalitarian principle that is supposed to guide the governance of producer organizations. The intensity of these tensions depends on the stringency of the standards (Reinecke et al. 2012) and on how the market rewards of differentiated standards are distributed.

Our findings on Producteurs de lait du Québec, BIVB and Demain la Terre reveal the importance of stringency. Non-stringent standards are more inclusive and more compatible with the democratic principles underlying POs. At Producteurs de lait du Québec, the introduction of new standards was consistent with the democratic values of the PO

because they did not set a very high bar and were applied in a uniform way. These standards were not designed for positioning specific products in the market; they are generic in order to prevent competition among members and to serve as a signal for the entire industry. Their goal is to position the entire provincial dairy sector as caring about the environment and animal welfare, to make it stand out *vis-à-vis* competing products such as plant-based products, and to gain legitimacy with citizens and governments. One interviewee mentioned that at the inception of the ProAction label, “there was certainly the idea of keeping supply management relevant and defensible for consumers and politicians.” The success in the implementation of the new standards is also due to the homogeneity of the membership and the follow-up provided by the marketing board. The economic regulation function of Producteurs de lait du Québec, which is involved in the supply management system, would play a role in this outcome. As one interviewee put it: in the ProAction scheme, “all producers should be targeted, not just the most innovative. Supply management could then act to help the most resistant conform.” While not inherently troublesome, there are nonetheless producers who believe that the standards are insufficient and are being implemented too slowly.

At BIVB, the uncertainty over the stringency and inclusivity of the new standard is problematic. Initially, the manner Burgundy chose to protect their first mover advantage was defined by elite producers—especially by the top-tier *Grand Cru* producers—to further enhance and entrench their social and market status. The process of labelling *climats* by UNESCO was dominated by these high-status *négociants* and enlightened *propriétaires* which were part of the Association des Climats. Non-elite actors were largely excluded from this process, and thus they were largely excluded from being granted initial *climat* recognition. Today, the decision made by BIVB to advocate for a more inclusive, dynamic application of the term creates tensions. The President of BIVB explained:

The Climats Association only wanted to recognize the Climats of the registered zone, BIVB argued that the concept was broader, and that historical work amply demonstrated this. The UNESCO recognition induced biases, and BIVB refused a [strict] geographical restriction of use.

How should these organizations respond to winegrowers who use the term *climat* but are not within a *climat* perimeter and do not make a grand cru or a premier cru? The Association des Climats argues the concept applies only to grand and premier crus, whereas BIVB does not agree with this interpretation, and thus they do not agree that these growers

are necessarily in violation of the standard. For these, the President noted:

We could do a ‘passing examination’. But we have not gone so far as to define the procedure for this ‘examination.’ In practice, we must recognize that the notion of climat is alive, and that without trivializing it we can make it dynamic...but our organizations [the Association des Climats and BIVB] do not necessarily have the same points of view (Personal interview, 2023).

In terms of stringency, Demain la Terre is an intermediate case. Its standard is broad enough to attract many members, but is still expected to differentiate them from basic fruit and vegetable. As long as a member pays its dues and satisfies the criteria, it can use one of the two labels established by the association (“without undetected chemical pesticide residues” and “cultivated without chemical pesticides”). But members are unequal in their ability to shape the standard in the first place. To a great extent, Demain la Terre relies on the resources of its members. The governing bodies of the PO are dominated by the largest producers, who are among the founding members. These producers are capable of allocating human resources to the technical committees where the specifications are designed. This creates a risk that the standards promoted by Demain la Terre and the negotiation of the framework partnerships with supermarkets favors their interests at the expense of smaller members. The former director of Demain La Terre explained:

When the company is small, it is difficult for the manager, who is on all fronts, to find the time to attend meetings. So, it’s more difficult, with small companies, to maintain a regular relationship, especially technical ones.

The cases of PigCoop and Marshville reveal the importance of how the economic returns derived from second-wave standards are distributed. As opposed to Demain la Terre, BIVB, and Producteurs de lait du Québec, both are directly involved in the processing and marketing of their members’ produce and have to make decisions as to how members are allocated to specific standards and how they are compensated. The Marshville’s cooperative caters to many different product niches. There are nine different types of milk that require specific certification both at the farm and processing levels (interview with the milk collection manager). In the eyes of the cooperative’s sourcing staff, the members belong to different groups depending on which type of milk they can supply. While some types of milk are more lucrative than others, the compensation received by members is

comparable across all categories. They receive a basic price per liter of milk that is already high by market standards. On top of that, as long as their farm is located in the *Appellation d’origine protégée* zone, they receive a fixed premium if their cows have sufficient space to graze around the farm and a variable premium depending on the rate of cows from the local breed. Organic producers and those whose milk is used for raw cheese receive extra premiums to cover their higher costs. In the past 10 years, the dairy farmers at Marshville have been among those in France who have received the highest compensation for their milk. These high rewards allocated fairly have made the farmers compliant with the cooperative’s drive towards highly demanding standards. In the following quote, a longstanding member described the cooperative’s segmentation strategy in a deferential way:

Clearly, these are managerial choices. [The director of the cooperative] has three objectives: quality, quality and quality. That’s what he always tells us. The plant is a juxtaposition of several workshops: butter, cream, Camembert and Pont-l’Evêque for the PDOs, and then Mimolette and infant milk powder. Very different activities, but all of them—well, not all, but as many as possible—with a lot of added value. As a farmer, I’m already dependent on the strategy that’s put in place, certainly by the Board of Directors, but also very much by the Director, I think.

By contrast, PigCoop’s strategy of segmenting its production resulted in tensions with its members. The leadership has used standards as an opportunity to categorize all of its members into several tiers. The specifications are organized into a hierarchy, with successive levels that farmers have to pass through in order to receive the highest premiums. While 90% of PigCoop pig farmers produced “welfare pork” in 2022, only 47% also produced pork without antibiotics 0 or 42 days after birth, and only a very small minority have animals fitted with RFID chips. The gradual increase in income as farmers move up this pyramid is supposed to attach them more to the cooperative. This is an important point because since the early 2000s, pork production in Brittany has been declining. Specifications have become “the entry point into farms” (interview with the director of another pig producer organization). Yet, this strategy has not been entirely successful. The multiplication of specifications has resulted in higher structural costs (IT, control, logistics). PigCoop’s profits are low, rarely exceeding 1% of total sales. This explains why, while PigCoop prides itself on paying pig farmers more than its competitors, the differences remain small (in 2022, according to data from the cooperative, a PigCoop pig was sold at an average of just 1.5% more than a non-PigCoop pig). Since 2021, PigCoop’s base price

has even been lower than the market price. The “upmarket move” has not resulted in a significant income increase for the cooperative and its breeders. The fact that PigCoop member farmers are not paid significantly more than those from other Breton pig POs, even though they have to accept stricter specifications and controls than in the latter, fuels considerable tension within the cooperative. After an initial attempt in 2023, a group of 308 PigCoop members sought the following year to overthrow the current leadership of the cooperative at the elections to renew its board of directors. Among their main grievances was the fact that PigCoop “no longer pays the market price for pigs. And there’s no sign that this is going to stop, quite the contrary.”⁵

Co-opting other large institutional players

The effects of standard-setting strategies on the internal life of POs are compounded by external factors. Crafting successful standards depends on the relationship between POs and their commercial and political environment.

While all standards covered in this paper are new to some degree, some fit in existing publicly-regulated TSRs. Although these frameworks grant legitimacy and durability to the new standards, they impose constraints that make these norms more selective and potentially divisive. In its promotion of *climats*, BIVB was constrained by the UNESCO World Heritage listing procedure, which puts a clear boundary on the territory that can claim this status. The same goes for the Marshville Cooperative, which used a revised *appellation d’origine protégée* as the backbone of its standardization strategy. From a formal standpoint, the *appellation* is managed by a “management and defense organization” (*Organisme de défense et de gestion*—ODG) rather than the cooperative itself. The chairman of this organization is the vice-president of the cooperative and is very sensitive to its interests. According to this man, the negotiations between the ODG and the Institut national de l’origine et de la qualité (INAO), the French national board supervising geographical indications, were very tense. As he told us, INAO’s representatives had a much stricter picture of what constituted a *terroir* dairy product worthy of legal protection:

They wouldn’t listen.

Interviewer: What did they want at the time?

They wanted us to get closer to Camembert [a local cheese protected by a very strict AOP], to the Camembert specification, they would have wanted the same thing.

Interviewer: So 50% of the local breed [in each farm]...

Yes, at the time it was 50%, but now they’d even like to go up to 80% or even 100%.

Finally, after years of negotiation, the percentage from the local breed was set at 30% pooled across all the farms supplying milk for the certified product. Had this compromise not been found, it would have created a rift within the cooperative between traditionally-minded farmers and the more productivist ones.

Resorting to private TSRs gives more flexibility but requires co-opting other large players in the value chain, such as major competitors or retailers. In that respect, PigCoop and Demain la Terre faced similar challenges. Through purely private standards, they aimed at products that were less differentiated than in the case of BIVB or the Marshville Cooperative. But their efforts were dependent on supermarkets. Despite its effort to segment its production, PigCoop remains a weak player compared with mass retailers. Unlike certain meat processors, PigCoop has not developed powerful brands, and most of the meat it produces, whether fresh or processed, is sold under retailer brands. Through its “without...” standards, Demain la Terre has managed to make its label popular among a certain segment of consumers. This makes it harder for supermarkets to impose their own labelling schemes. However, Demain la Terre shares the “undetected chemical pesticide residues” segment with another collective, Nouveaux Champs. Created in 2017 the latter set up a different standard called “Zero Pesticide Residues” (ZRP). Initially limited to the fruit and vegetable sector, the ZRP label has gradually been extended to other sectors (wine, pasta). 93% of ZRP-labeled products are sold in supermarket distribution channels, targeting the same consumer categories as Demain la Terre-labeled products. Because ZRP-labeled products have conquered certain markets, some Demain la Terre members, notably of carrots and onions, had to adopt the competing label in order to continue to market their products.

However, the separation between the public and private TSRs is not always clear. In some cases, private standards are introduced by POs to influence regulation. This is obviously the case for Producteurs de lait du Québec. Through its new ProAction certification program, this PO strives to avert any loss of consumer and citizen confidence. This program, through its various actions, aims officially to position Canadian milk as one of the finest in the world, but also implicitly, to maintain public support, thereby establishing a reservoir of goodwill for a positive public opinion and the preservation of this regulatory framework, even in the face of criticism. In doing so, the PO demonstrates the efficacy and relevance of its economic regulation model, as well as

⁵ Leaflet “Donnons un avenir à [PigCoop]” (“Give a future to PigCoop”), published by a French investigative media, May 2024.

its capacity to address evolving societal expectations and emerging agricultural trends. Demain la Terre's corporate social responsibility (CSR) program and its two "without" standards have helped it building privileged relationships with political decision-makers. Bypassing the sector's main professional and inter-professional organizations, the club's representatives are regularly invited for meetings at the highest levels of government. From the Ministry of Agriculture to the President, via the Ministry of the Economy, the business leaders at the head of this club promote their vision. In 2018, they launched a cross-sectorial initiative. Through a collective called "Third Way", they joined forces with three other associations that promote similar initiatives in the animal, cereal and wine sectors: the "*Bleu-Blanc-Cœur*", "*Blé de nos campagnes*" and "*Vignerons en développement durable*" networks. This political influence is leveraged to change farming policy. In 2015, the French Ministry of Agriculture recognized the equivalence between the DLT label and the level 2 of the "high environmental value" certification (*Haute valeur environnementale niveau 2*), which satisfies the environmental criteria to receive funding under the greening mechanism of the European Union's common agricultural policy.

Discussion and conclusions

While food standards have created imbalances between farmers, retailers, and consumers (Arnold and Loconto 2021; Dolan and Humphrey 2000; Tran et al. 2013), our findings show that in the Global North, producers may craft their own standards and use them to their advantage. The organizations representing them have been active in standard enforcement and standard setting for decades. More recently, they have been key players in the shift from standards whose goal was to streamline production towards second-wave standards putting forward sustainability or place-based definitions of quality. POs have thus used such standards since the 1990s to reconquer increasingly liberalized and globalized food markets. Some, however, have been more successful than others.

A first measure of the success of these strategies is whether the standard set by the PO gains institutional power (Fligstein 2001) over the rest of the value chain. Do competitors and downstream players take up the new standard? Widespread adoption by an incumbent PO can turn a standard into the legitimate, taken-for-granted way of doing business for all market participants. This has been the case for Producteurs de lait du Québec, who have set new criteria for what constitutes milk that is suitable for the provincial market. Other standards are more stringent and have set producers apart, enabling them to occupy lucrative market

niches and protecting them, at least temporarily, from price competition (Arnold and Loconto 2021; Carter 2018; Tanaka and Busch 2009). The new standards set by BIVB and the Marshville cooperative are a good illustration of this. In some cases, market structure prevents the producer organizations from fully benefiting from its standard-setting strategy. The size of the PO compared to its market and its marketing channels is an essential dimension. While the Marshville cooperative managed to integrate several market niches, its small size prevented it from radically changing the legitimate ways of doing business in the dairy sector. Burgundy *négociants* and wine growers were the most successful due to their large size relative to the market and their incumbent status. By market structure, we also mean the organization of the supply chain. Demain la Terre and Pig-Coop both have a large size relative to their market but they are constrained by supermarkets acting as gatekeepers to their markets. This finding about supermarkets constraining producer organizations in their attempts to redefine quality is consistent with another case in the literature (Schermer 2022).

Another measure of success is whether standard-setting strategies helped producer organizations function differently from private enterprises and live up to their alleged agrarian values of solidarity, democracy, and autonomy (Forney and Häberli 2017). Whether they are successful or not, these standard-setting strategies come at a cost, that of further hybridizing producer organizations. "Hybridization" is the process whereby POs adopt certain characteristics of corporate enterprises (Bijman et al. 2013; Chaddad 2012; Hogeland 2008) and where members lose their power to non-elected managers.

In terms of solidarity and democracy, differentiated standards might create a rift within the PO, setting apart the producers who are capable of meeting the standard from those who are not. This hinges both on the standard-setting process (who is to intervene in the standards-setting process and who is to be included in the standard) and the allocation of market rewards. Our findings identify a trade-off between the standard's stringency (and potential to differentiate the PO on the market and to legitimize new forms of valuation) and its inclusivity. As in the case of Producteurs de lait du Québec, inclusion and homogeneity allow to share the potential benefits among all members and to adhere to the egalitarian principles underlying producer organizations (Mooney 2004). But such standards are rarely stringent enough to truly set apart the PO from the rest of the market. More exclusive standards reap higher economic rewards through market differentiation and by making value claims more credible but risk creating a multi-tiered PO. This enriches Arnold and Loconto's (2021) finding that adopting standards may create "residues" and make certain members

“invisible.” While Arnold and Loconto view this as a socio-technical process, we show the organizational politics that might limit or reinforce this outcome. In the case of *climats* and Burgundy wine, the PO has acted as a way to share the reputation associated with a stringent standard with a higher number of producers. This political goal of sharing the rewards of second-wave standards has been at play as well at the Marshville cooperative. By contrast, the leadership of PigCoop made a deliberate choice to separate its membership into different tiers with different levels of compensation. At Demain la Terre, the loose organizational structure was an asset to swiftly promote the new “third way” market segment for fruit and vegetable, but also meant a lack of transparency and democratic control over the design of the technical specifications.

Regarding autonomy, second-wave standards have had mixed results. On the one hand, they have enabled large groups of producers to conquer newly liberalized markets and to retain a degree of decision-making power over the prevailing market norms. On the other, adherence to standards always requires some degree of cooperation or accountability towards other players (see Forney 2021), whether they are third-party certifiers, state authorities, market competitors, processors, or retailers. Our findings qualify the claim made by Forney and Häberli (2017) that POs’ marketization strategies, and the ensuing loss of solidarity and democracy, necessarily lead to more control of the farming sector over the rest of the value chain. Overall, the foray of POs into second-wave standards has changed their organizational identity and has altered the way they interact with the state. Setting new second-wave standards emphasizing values such as sustainability or *terroir* is not just directed at the market. It has also been a way for certain POs to rekindle their links with the state and the citizenry and to maintain their special status despite the liberalization and globalization of food markets. At the same time, making these standards successful has implied a new relationship with state authorities and a new public role that still sets them apart from privately-owned businesses operating in the food value chain. Rather than providing consumers and citizens with safe, mass-produced food commodities while defending agrarian interests, as they did before the 1990s, they now advertise their role as organizations sourcing locally-produced, sustainable, and culturally-rich products. They are increasingly less protected by exemptions from the laws of the market and have focused instead on influencing the private and public norms that define food quality.

Therefore, when POs set second-wave standards, public regulation is still on the horizon. In the case of the Marshville cooperative and BIVB, the POs strategically used (and adapted) state-backed certification mechanisms to promote their own definitions of quality. In the cases of *Demain La*

Terre and Producteurs de lait du Québec, the goal of private standards was to influence regulatory decisions or legislation, either by increasing the POs legitimacy in the eyes of the citizenry, or through a logic of legal endogeneity (Edelman 2016). Just as the first wave showed how private standards for industrial quality and safety were entangled with state regulations to prevent fraud and protect human health, this second wave of standards are pre-empting state regulation by introducing realistic quality standards that both consumers and governments are willing to accept. What is interesting about these POs is the scale of their standardization. The entrance of a number of mid-sized, cooperatively-owned organizations in the regulation of food shows that there may be a middle ground for promoting change between the generic commercial power of large agro-industries and the alternative niches of alternative agrifood networks. The POs we studied demonstrated the trade-offs that are common to mid-size or member-owned enterprises: the desire for stricter standards that can meet consumer or government concerns must be balanced against the need to maintain coherence and solidarity among members. The capacity of these POs to thus gain legitimacy for their standards from both the consumers and governments is crucial to their survival. This supports earlier studies that suggest that the state is always present in the tripartite standards regime (Fouilleux and Loconto 2017; Loconto and Busch 2010). Contrary to what some scholars have suggested (Cashore 2002; Hatanaka et al. 2005), the rise of second-wave standards did not mean a triumph of private governance of food markets, but rather a reshuffling of public-private relationships.

Author contributions All authors participated in the seminar and workshops where the theoretical framework was developed. SB was the convener of the first seminar organized in February 2021. SB and AL developed the first conceptual framework and methodology, all authors contributed to improving them. SB, EC, MOD, LM, GN, FP, and AR collected and analyzed data for the five empirical cases presented in the article. SB wrote the first draft of the manuscript based on all author contributions for each case, and all other authors commented upon it. All authors read and approved the final manuscript.

Funding Open access funding provided by Université Paris Dauphine-PSL. Parts of the empirical research were funded through an INRAE junior researcher grant (EcoSocio department) and a grant provided by Agence Nationale de la Recherche (ANR-18-CE26-0016).

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