



# A Review of Marketing Channel Implications in Agribusiness

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**Abstract:** *This review analyzes the impacts of transformations in agribusiness marketing channels, specifically supermarket expansion, value-chain governance, and digitalization on value distribution, smallholder inclusion, and overall system competitiveness. Using an integrative qualitative review, the study synthesizes evidence from recent academic literature, institutional reports, and policy analyses published over the last two decades. Findings show that modern retail growth enhances quality control and procurement efficiency but often excludes smallholders unable to meet stringent standards and capital requirements. Governance dynamics further shape distributional outcomes, as concentrated buyer power allows lead firms to influence pricing, compliance costs, and coordination structures, reinforcing asymmetries unless counterbalanced by supportive policies, transparent contracting, and stronger farmer organizations. Digitalization offers new pathways for efficiency and market access through e-commerce platforms, traceability systems, and data-driven coordination, yet its benefits remain uneven due to digital divides, limited infrastructure, and unclear data governance frameworks. The results highlight that*

*modernization alone does not guarantee inclusivity. Building resilient and equitable agrifood systems requires integrated strategies that combine technological innovation with fair governance arrangements, institutional support, and targeted policies that enable smallholders to upgrade and participate in evolving market channels.*

**Keywords:** Buyer Power, E-commerce, Digitalization, Inclusivity, Supermarket Revolution

## Introduction

Marketing channels, the network of intermediaries, institutions, and linkages that move agricultural products from producers to consumers, are a fundamental component of agribusiness systems. They determine how value is distributed across actors, how efficiently price signals are transmitted, and how effective quality and safety standards are enforced. In this way, they shape both the competitiveness of producers and the inclusivity of market participation. A recent study emphasizes that channel structures and governance arrangements are not static but evolve in response to globalization, technological innovation, and shifting consumer demands (Reardon et al., 2019).

In the past decade, agrifood systems have witnessed rapid transformations in their marketing arrangements. The expansion of modern retail and supermarkets has evolved procurement practices, often requiring higher quality and safety standards (Vishnu & Kumar, 2019). This trend has increased opportunities for commercial producers but has also raised concerns about the exclusion of smallholders who lack the capacity to comply with

stringent requirements (Minten et al., 2017; Reardon & Timmer, 2015). Parallel to this, the midstream segment, including wholesalers, processors, and logistics providers, has undergone what has been termed a “quiet revolution,” with small and medium enterprises playing a growing role in aggregation, cold storage, and distribution (Reardon et al., 2019).

A complementary body of literature highlights the importance of contract farming and vertical coordination as mechanisms for linking farmers with modern markets. Reviews indicate that contractual arrangements can enhance access to inputs, credit, and stable buyers, resulting in higher incomes and reduced risks. Yet outcomes are far from uniform, with contract success heavily influenced by governance structures, farmer bargaining power, and institutional support (Bellemare & Bloem, 2018; Ton et al., 2018). At the same time, the proliferation of food quality and safety standards has reshaped channel governance. Private standards have enhanced consumer trust and enabled entry into export markets, but they also risk marginalizing farmers unable to meet compliance requirements (Gereffi & Lee, 2016). Moreover, uneven price transmission along value chains underscores the persistence of power asymmetries and infrastructure gaps that disadvantage smaller producers (Emediegwu & Rogna, 2024).

The digitalization of agriculture represents another defining development in marketing channels. Digital platforms, e-marketplaces, and blockchain-enabled traceability systems are increasingly promoted as solutions for reducing transaction costs, improving transparency, and expanding market access. While scoping reviews underscore the potential of such innovations, they also highlight persistent digital divides in connectivity and literacy, as well as limited evidence on sustained impacts for smallholder inclusion (Choruma et al., 2024; World Bank, 2021). In addition, the disruptions triggered by the COVID-19 pandemic further underscore the importance of resilient marketing systems. Lockdowns and mobility restrictions disrupted logistics, labour availability, and access to markets, exposing vulnerabilities in conventional channels. At the same time, adaptive responses such as the adoption of direct-to-consumer models, localized procurement, and digital marketing illustrate the capacity of agrifood systems to innovate under crisis conditions (Hobbs, 2020).

By consolidating findings across these domains, this review contributes to a deeper understanding of how marketing channels influence distributional outcomes, competitiveness, and market access in the agribusiness sector. It further identifies persistent knowledge gaps and provides insights to inform future research, policy design, and strategic interventions aimed at building inclusive and resilient food systems. Undertaking this review is therefore justified by the need to synthesize dispersed evidence on evolving marketing channel dynamics, assess their implications for smallholder inclusion and competitiveness, and guide policies that can foster more equitable and adaptive agrifood systems.

## Literature Review

### Structural Transformation: The Supermarket Revolution and Modern Retail

The rise of supermarkets and other modern retail outlets represents one of the most

notable structural transformations in agrifood systems. Scholars often describe this as the “supermarket revolution,” reflecting both the rapid diffusion of modern retail outlets and their reconfiguration of procurement systems, supplier relations, and consumer markets. Unlike traditional markets, modern retail channels are characterized by a higher level of vertical coordination, standardized procurement practices, and more stringent quality and safety requirements (Reardon & Timmer, 2015; Reardon et al., 2019). A systematic review by Hartmann-Boyce et al. (2018) demonstrates that supermarket-based interventions such as changes in product placement, promotion, and pricing substantially influence purchasing decisions, revealing the power of modern retail to shape dietary outcomes. Finally, Richards (2024) synthesizes recent developments in food retailing across developing economies, emphasizing that the supermarket revolution embodies both concentration and diversification, with implications for competition, growth, and food security.

Empirical evidence suggests that supermarket expansion creates new opportunities for farmers and agribusinesses. The spread of modern retail outlets into lower-income communities also fosters localized agribusiness development and strengthens linkages between consumer demand and upstream supply, particularly in perishable commodities (Hollis-Hansen, 2019). In Indonesia, Ichikawa et al. (2017) found that younger, better-educated vegetable farmers with access to irrigation, roads, and storage facilities were more likely to integrate into supermarket supply chains, with significant income advantages over those confined to traditional channels. Similarly, panel data from Kenya showed that smallholders engaged in supermarket contracts experienced a 40% increase in household income and a measurable reduction in multidimensional poverty, underscoring the potential of modern retail to drive inclusive growth (Ochieng & Wu, 2020).

Despite the promise of supermarkets and modern retail to stimulate agricultural commercialization, growing evidence indicates that these benefits are distributed unevenly, shaped by structural and institutional barriers that systematically exclude many smallholders and weaker agribusinesses. Studies in Southeast Asia reveal that many smallholders lack the financial capital, technical capacity, and infrastructure necessary to comply with the volume and quality demands of supermarkets, resulting in reliance on intermediaries or continued dependence on traditional markets (Ortenblad et al, 2023). Supermarket procurement systems tend to favor producers who can meet strict quality, volume, and certification requirements, effectively excluding smaller or resource-poor farmers unable to comply (Boateng et al., 2023). Moreover, supermarkets’ increasing reliance on private standards and their concentrated buyer power shift compliance costs and risks upstream, reinforcing dependency and exclusion among small-scale suppliers (Das Nair et al., 2018). Even collective marketing mechanisms, designed to foster inclusion, remain constrained by institutional and social barriers that limit participation by vulnerable producers (Magakwe, 2024). These dynamics illustrate how supermarket expansion can embed new hierarchies within agrifood systems, producing an uneven modernization where access and benefits accrue mainly to those with pre-existing advantages in capital, organization, and institutional support.

In response to these challenges, recent research has identified innovative business

models that can bridge the gap between smallholders and modern retail systems. Evidence from vegetable value chains in Indonesia suggests that upgrading traditional procurement systems through farmer cooperatives, aggregation hubs, and intermediary-led models can help farmers meet supermarket requirements while reducing risks of exclusion (Utomo et al., 2023). Similar findings from Kenya indicate that intermediary-based and group contracting arrangements enhance smallholder participation in supermarket supply chains by lowering transaction costs and improving compliance with quality standards (Ogotu, 2019). Likewise, studies on regional food hubs in Europe show that aggregation and shared logistics can strengthen producer coordination and facilitate entry into high-value retail markets (Berti & Mulligan, 2016).

It shows that the "supermarket revolution" represents a major change in modern food systems, affecting how food is sourced, consumed, and marketed. The growth of modern retail has created important opportunities for farmers to sell their products, increase their income, and reduce poverty, especially for those who can meet high-quality and volume requirements. However, these benefits are not shared equally. Many small-scale farmers face challenges due to limited capital, poor infrastructure, and difficulty meeting standards, which often excludes them from these new markets. Recent studies suggest that inclusive business models like farmer cooperatives, collection centers, and partnerships with intermediaries can help overcome these barriers by lowering transaction costs, improving coordination, and making it easier for small farmers to join supermarket supply chains.

### **Governance, Value Chains, and Buyer Power**

Governance within agrifood value chains encompasses the institutional arrangements, coordination mechanisms, and decision-making structures that regulate relationships among chain actors and determine the allocation of value. A central theme in the literature is the role of buyer power, particularly in contexts where large retailers, processors, and exporters operate as lead firms. These actors frequently dictate pricing structures, procurement modalities, and compliance with quality and safety standards, thereby exerting significant influence over how risks, responsibilities, and economic rents are distributed across the chain (Bonanno et al., 2017). Additionally, contemporary agrifood systems are increasingly characterized by buyer-driven governance, wherein lead firms such as major retailers, processors, and exporters exert significant control over production standards, sourcing practices, and value distribution. This governance structure reflects the consolidation of market power in downstream segments of the value chain, shaping both producer behavior and market access (Barrett et al., 2022). Guimarães et al. (2023) suggest that lead firms' governance structures and buyer-driven coordination mechanisms dominate the study of agrifood global value chains, highlighting how buyer power shapes both sustainability and upgrading opportunities.

Empirical analyses of agricultural value chains emphasize that coordination, control, and safeguarding practices vary across commodities and contexts, and that informal, relational exchanges persist alongside more formal buyer-led contracts, with implications for which marketing channels survive or are displaced (Mishra & Dey, 2018). Studies on

enabling transformations suggest that buyer power can be inclusive when complemented by supplier development, finance, aggregation, and enabling public policy; however, in the absence of these enablers, it tends to exclude smallholders and fosters parallel informal channels (Hidayati et al., 2023). Research on sustainability-based chains shows governance increasingly hybridizes public, private, and civil-society roles to secure trust and verify credence attributes, meaning marketing channels that trade on sustainability require governance designs that build multiple forms of trust and monitoring capacity (Grohmann et al., 2023). Finally, systematic reviews of trust in agri-food value chains underscore trust as a core mediating mechanism affected by digitalization, governance design, and buyer practices that condition cooperation, compliance, and the stability of marketing channels (De Vries et al., 2023).

Governance in agrifood value chains is a dynamic process occurring at multiple levels, influenced by power imbalances, institutional settings, and changing coordination methods. In many cases, buyer-driven governance prevails, promoting efficiency and standardization but also centralizing control and value in later stages of the chain. The extent to which governance is inclusive depends on the availability of supportive mechanisms such as supplier assistance programs, policy frameworks, and trust-based relationships that can help balance buyer power and encourage fairer participation throughout the value chain.

### **Digitalization and Platform-Enabled Channels**

The rapid digital transformation of agrifood systems has redefined the structure and functioning of marketing channels, particularly through the emergence of platform-enabled and data-driven exchange mechanisms. Digitalization represents not merely the adoption of new technologies but a fundamental shift in how producers, intermediaries, and consumers coordinate transactions and share information across value chains. It influences the efficiency, inclusiveness, and governance of agribusiness markets, prompting both opportunities for integration and new forms of dependency. As Macaumbao and Bandera (2025) emphasize that advanced technologies help to improve accuracy, operational efficiency, and strategic foresight.

From a positive perspective, digitalization has improved the efficiency and responsiveness of agribusiness marketing systems by reducing transaction costs, enhancing transparency, and shortening the distance between producers and consumers. The expansion of e-commerce platforms has allowed agricultural producers to bypass multiple intermediaries, enabling more direct and profitable connections with end markets (Zhang & Berghäll, 2021). Similarly, the integration of Internet-of-Things applications and agricultural data platforms has enhanced real-time coordination of production, logistics, and marketing activities, creating more adaptive and information-rich supply chains (Uyar et al., 2024). Emerging digital traceability and blockchain systems have further improved quality control and consumer trust, opening access to high-value export and certified markets (Charlebois et al., 2024). In developing economies, these technologies have supported smallholder inclusion and sustainability when accompanied by digital-literacy

initiatives and supportive infrastructure investments (Morepje et al., 2024). Collectively, these findings highlight how digitalization fosters more efficient, transparent, and market-responsive agribusiness channels.

On the other hand, the digital transition also introduces governance and equity challenges that reshape power relations within agrifood value chains. The increasing dominance of a few digital platforms has led to oligopolistic control over data, pricing mechanisms, and market access, effectively transferring decision-making authority from producers and intermediaries to platform operators (Sauvagerd et al., 2024). This concentration of power risks marginalizing smaller or less technologically capable actors, reinforcing barriers to entry and dependence on platform-imposed rules (Martens & Zscheischler, 2022). Moreover, Jouanjan et al (2020) highlight that fragmented and unclear data governance arrangements have raised concerns among farmers about the regulatory environment governing the data collected on and about farms, potentially affecting their willingness to adopt digital solutions. This lack of clarity in data ownership and usage frameworks can hinder the overall effectiveness of digital agriculture initiatives. In rural and resource-constrained contexts, limited infrastructure and institutional support continue to hinder equitable participation, leading to uneven benefits from digital market integration (Abdulai et al., 2023). Thus, while digitalization offers pathways for efficiency and inclusion, it simultaneously reconfigures governance and market power, underscoring the need for balanced policies and platform governance frameworks that ensure fair and inclusive agrifood marketing systems.

## Research Method

This paper used a qualitative literature review based on an integrative review of primary and secondary sources. Relevant academic journal articles, institutional reports, and policy documents were systematically examined to synthesize current knowledge on the transformation of agribusiness marketing channels. Sources were selected through targeted searches using keywords such as agribusiness marketing, value chains, supermarket revolution, and digital agriculture. Emphasis was placed on studies published within the last two decades to capture recent structural and technological shifts. The analysis involved thematic categorization of findings related to governance, market integration, digitalization, and inclusivity, allowing for a comprehensive yet comparative understanding of trends and challenges in modern agrifood systems.

## Results and Discussion

The transformation of agribusiness marketing channels is characterized by three interrelated trends: the rise of modern retail and supermarkets, evolving governance arrangements shaped by buyer power, and the accelerating digitalization of value chains. These forces have improved efficiency, quality assurance, and market connectivity, yet they have also introduced new challenges related to inclusivity, equity, and institutional adaptation.

The expansion of modern retail and supermarkets has enhanced efficiency and

consumer preference, while simultaneously marginalizing smallholders who lack access to capital, infrastructure, or the capacity to comply with strict quality standards. Empirical evidence indicates that integration into supermarket supply chains can raise farmer incomes and reduce poverty, but these gains remain uneven and context-dependent. As such, modernization must be viewed not as a uniform process but as a differentiated transformation shaped by local contexts and governance dynamics. The persistence of traditional markets in serving low-income consumers underscores the importance of coexistence rather than displacement. This indicates that achieving inclusive agribusiness development requires complementary strategies, strengthening traditional markets while enabling smallholders to participate in emerging modern retail systems.

Moreover, governance structures and buyer power play a major role in determining who gains the most from value chain participation. In buyer-driven systems, large firms usually control prices, product standards, and trading conditions, giving them greater power while leaving small producers with limited influence. This imbalance often creates dependency and restricts farmers' ability to make decisions, especially when there is weak government oversight. However, these systems can also bring benefits if managed well, such as providing farmers with training, guaranteed markets, and better product quality. The main challenge is to create fair and transparent arrangements that support both efficiency and equity. This requires deliberate policy interventions, fair contracts, effective dispute mechanisms, and stronger farmer organizations to increase their collective bargaining power.

Digitalization emerged as a transformative yet uneven force within agrifood marketing systems. Digital platforms, e-marketplaces, and blockchain-based traceability tools have reduced transaction costs, improved transparency, and created new avenues for market access. However, persistent digital divides driven by unequal connectivity, literacy, and access to technology continue to constrain inclusivity. Evidence suggests that hybrid models combining digital tools with physical intermediation and institutional support are more effective in linking smallholders to formal markets than stand-alone digital solutions. Realizing sustainable and inclusive outcomes requires implementing targeted policies to reinforce institutional frameworks, advance digital infrastructure, promote collective action among farmers, and harmonize modernization efforts with social and economic equity considerations.

## Conclusion

The evolution of agribusiness marketing channels reflects a broader transformation driven by globalization, modernization, and digital innovation. These shifts have redefined how agricultural value is created, governed, and distributed across actors. Although modernization and digitalization have improved efficiency and expanded market access within agribusiness, persistent structural inequalities and power imbalances continue to hinder inclusive participation. Advancing equitable and sustainable market integration, therefore, requires strengthened institutional support, transparent governance, and strategic investments in digital infrastructure and literacy.

This study's insights have practical applications for policymakers, agribusiness firms, and researchers. Future research should deepen empirical analysis of how digital platforms, supermarket procurement systems, and buyer-driven governance on smallholder inclusion, pricing, and upgrading, with comparative and longitudinal studies across commodities and regions. More evidence is also needed on the growing role of midstream actors and on how hybrid governance models that combine public regulation, private standards, and digital traceability can improve both efficiency and equity. Practically, policymakers and industry stakeholders should prioritize investments in rural infrastructure, digital connectivity, and farmer digital literacy, alongside support for cooperative and aggregation models that reduce transaction costs and improve compliance with standards. Regulatory interventions that promote fair contracting practices, transparent pricing, and accountable data governance are essential to balance buyer power. Inclusive business models that integrate digital tools with physical intermediation and capacity-building efforts can further ensure that marketing channel modernization delivers broad-based and sustainable benefits.

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