ISSUES AND INTRICACIES OF CORPORATE RETAILING OF FRESH FRUITS AND VEGETABLES - AN EMPIRICAL STUDY IN BANGALORE

Dr. K. Ramachandra *
N. Meena Rani **

Abstract : *Corporate Retailing of Fresh Fruits and Vegetables in India began way back in 60's but started picking up only in the last decade. Food retailing has served as the backbone for large retail stores contributing 70 % of its revenue in an estimated market of USD 325 Bn in 2011. The organized food retail has attained a promising size which is bound to grow manifolds in the coming years. The corporate India takes cues from the happenings of retailing in developed countries and trying to replicate the model in India, but it cannot afford to ignore the startling reality that the retailers with big organized shelves only constitute for 6% of the total market, so 94% of the produce is still traded in conventional wet market and mom and pop stores.*

Driven by the contrasting realities pertaining to the corporate retailing of fresh fruits and vegetables, an empirical study has been taken up in Bangalore, one of the most happening retail destinations in the country, to get the large retailers' take on various issues pertaining to retailing fresh fruits and vegetables. The primary data collection tools consisted of structured interview schedule, personal discussions with the top executives and personal observation of 8 large retail organizations engaged in retailing of fresh produce in Bangalore. Qualitative and quantitative data were collected on the most pertinent issues such as procurement and supply chain, marketing strategies adopted by the retailers, prospects of growth, key challenges faced, and the respondents' personal views on various issues in modern retailing; and the data were analysed. The suggestions are made duly considering the amount of money and effort being placed in fresh fruits and vegetables segment by the large retailers, the impact on small and street vendors, and with utmost interest on the environment, consumers and the society at large.

Key words : *Corporate retailing, Fresh Produce Retailing, Food Retailing, Marketing Strategies Retail Democracy and Supply Chain*

Introduction

Corporate Retailing of fresh fruits and vegetables (FFVs) in India began way back in 60's but started picking up only in the last decade. Food retailing has served as the backbone for large retail stores contributing 70 % of its revenue in an estimated market of USD 325 Bn in 2011. The organized food retail has attained a promising size which is bound to grow manifolds in the coming years. The retail sector has witnessed considerable growth in the new millennium while a new form of organized retail sector has emerged within the retail industry. Organised retail sector largely refers to the retail chains managed by big corporate houses such as the Pantaloons group, K. Raheja group and so on. The reasons for this expansion of retail is evidently related to the liberalization and opening up of the Indian economy which had immense effects on the consumer demand, tastes and preferences as well as the buying capacities of the Indians (specially the growing middle class) over the past few years.

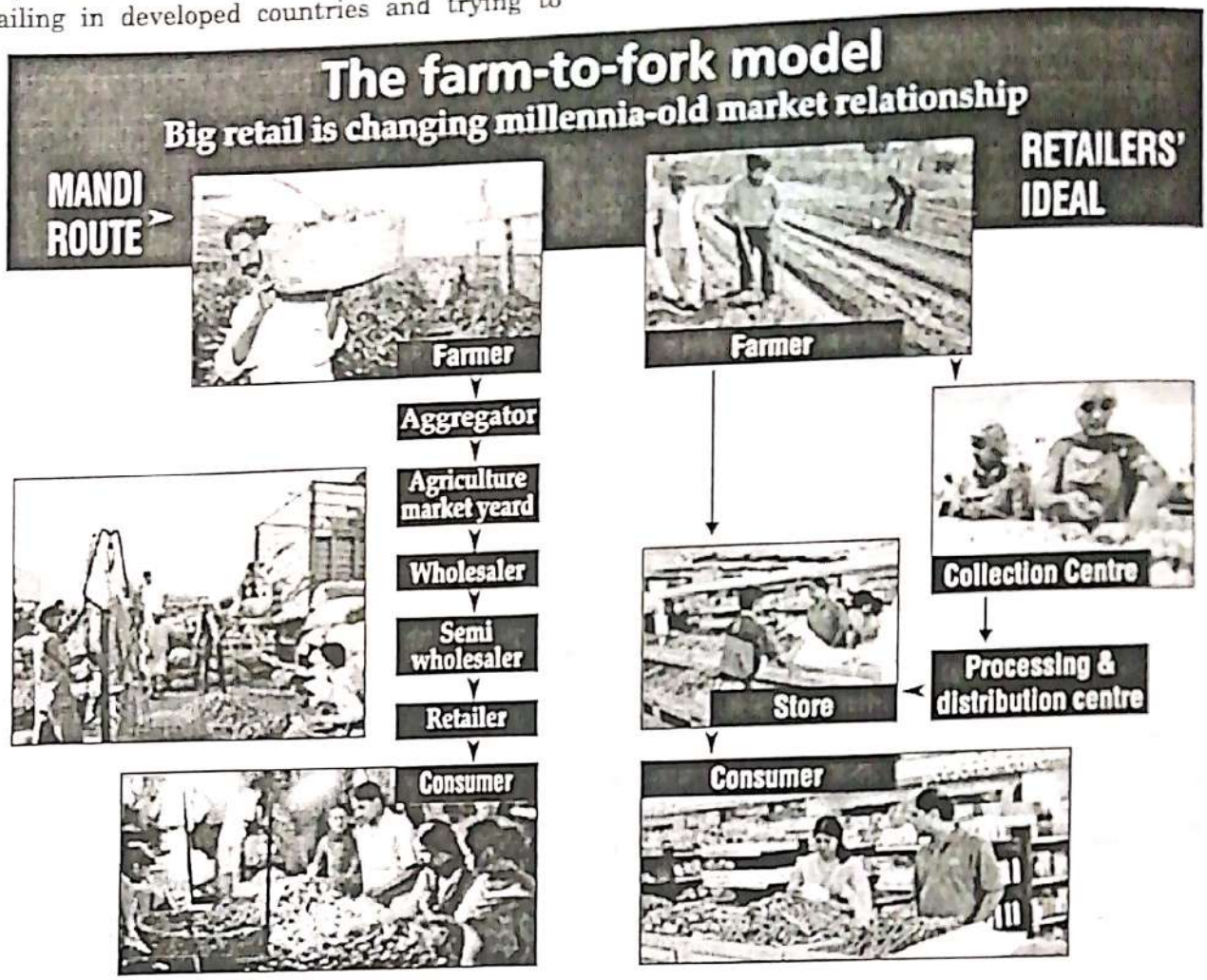
The general benefits of organized retail include improved supply-chain (depicted in Figure 1), improved marketability of farmer's produce and heightened economic activity. The critics of this emerging phenomenon point to the inevitable negative impacts of organized chains on the unorganized and small retailers who are under the threat of displacement. However the President of CII (Confederation of Indian Industry) Mr. Sunil Mittal emphasized that the traditional unorganized retail will not be wiped out by the organized form. He said, "The retail industry in the country will grow to $500 billion in the next 10 years from the existing $300

* ***Dr. K. Ramachandra*** - *Professor and Head, Department of Commerce and Management, Maharani's Arts, Commerce and Management College for Women, Bengaluru, Email: drkrc@rediffmail.com*

** ***N. Meena Rani*** - *Research Scholar, Jawaharlal Nehru Technological University, Hyderabad, Email: meenasrinivas@rediff.com*

billion, while organized retail would only account for $100 billion, so the unorganized sector would also witness growth."

The corporate India takes cues from the happenings of retailing in developed countries and trying to replicate the model in India, but it cannot afford to ignore the startling reality that the retailers with big organized shelves only constitute for 6% of the total market, so 94% of the produce is still traded in conventional wet market and mom and pop stores.



1. Figure showing the supply chain advantage of organized retailing
Source: http://careergyaan.org/downloads/scdl/20684119-Sales-Management-Project.pdf

2. REVIEW OF LITERATURE

James K. Nyoro (2004) argues that the growth of the supermarkets in various regions of the world have caused fundamental structural changes in the produce supply chains particularly in taking away market shares from traditional retailers. The author examines trends and their effects on the marketing of fruits, vegetables and dairy by largely small-scale farmers in Eastern Africa, it is found that the sourcing of FFV and vegetables by supermarkets in Kenya tends to favor the medium, large and other organized producers but the smallholders are negatively affected.

Grahame Dixie (2005) contends that consumer preferences for food products are constantly changing and developing, particularly in the case of horticultural products. The marketing system needs to deliver the volumes, quality and variety of safe and nutritious food products that consumers require. It needs to be sufficiently dynamic so that it can continue to provide consumers with choice by developing and delivering new products.

G.Laxmi Prabha and Amatul Baseer (2007) capture the emerging retail trends in India but cautioned that, because of the heavy initial investment required, breakeven is difficult to achieve and many of these players have not tasted success so far, However, the future is promising; the market is growing, government policies are becoming more favorable and emerging technologies are facilitating smoother operations. A large young working population with median age of 24 years, nuclear families in urban areas, along with increasing

working –women population and emerging opportunities in the services sector are identified to be the key growth of the organized retail sector in India.

Sharif Memon (2007) glances at the recent trends in India demonstrating steady growth of organized retail sector, with a variety of big business players trying their fortunes in this part and thereby expanding into retailing. The study elaborates the competitive promotional tools including Advertising, Sales promotions, Direct Marketing, Personal selling, Public Relations, Publicity, Interactive marketing, and point of purchase marketing.

Surabhi Mittal (2007) observed a shift in cropping pattern in favour of horticulture in India in last one and a half decade. Analysis of the economic feasibility of this shift, away from cereals to fruits and vegetables, shows that it is economically viable and beneficial to shift towards horticulture production, but this diversification needs to be in systematic and planned manner. The study confirms the changing consumption pattern and diversification, while highlighting that in next 15-20 years the supply might fall short of the increased domestic demand.

K.P. Mangala and P.G. Chengappa (2008) studied the performance of one of the leading food retail chains, 'Spencers', in Bangalore, that established direct procurement contract with farmers for fresh fruits and vegetables. They found that this linkage has been able to change the method of farming and the marketing arrangement followed by the food retail chains. This model is specially suited to small and marginal farmers, and improves their economic conditions by providing an opportunity to grow and supply high-value vegetables round the year at a fairly good price.

Vijay Kumar et al (2008) outline that there are serious concerns about the entry of organised retailers in the Indian food sector like its impact on farmers, 'kirana' store owners, traders, commission agents, consumers and the economy. Based on a study of the Indian food retailing industry, this article indicates that while these concerns are valid, there are more winners than losers in the process.

Dastagiri (2009) analyzes the status, growth, marketing models and future plans of public and private food retail markets in agriculture in general and horticulture and fisheries in particular during WTO regime and suggests policy measures for growth of retail markets in agriculture. The traditional markets are making way for new private retail markets in various formats such as departmental stores, hypermarkets, supermarkets and specialty stores.

Shankar Gopalakrishnan and Priya Sreenivasa (2009) contend that corporate food provision, rather than being a panacea for Indian agriculture, will likely accelerate many key elements of India's agricultural crisis. It will lead to a decline in land productivity, reduce food security, adversely affect price stability and will tend to negatively impact employment and credit relations.

Rasheed Sulaiman V et al (2010) explored the procurement operations of the organized retailers and its impact on producers of fruits and vegetables at Vontimamidi (a vegetable growing cluster that is a major procurement hub of organized retailers in Hyderabad, India). The study found that those selling their produce through organized retailers are benefitted by way of higher prices than the local market price. However, the organized retailers procure high quality produce, a majority of the producers still to depend on local mandis to sell bulk of their produce.

Sukhpal Singh (2011) perceives that foreign investment in multi-brand retail is being pushed as an important tool for controlling food prices. Considering the global experiences, the author believes that FDI in retail often has the opposite effect. The impact on low-income consumers in low-income areas has been particularly adverse.

Christian Hofer et al (2012) contend that large retailers tend to exploit weaker suppliers. The empirical analysis of data from two large retailers, Wal-Mart and Target, and a broad cross-section of their suppliers supports the preposition that suppliers that depend More on Key Retail Account (KRAs) customers (large retailers) for major share of their revenue lose their strength in the marketplace, but as the KRAs gain market share their suppliers' performance tends to increase.

Murali Patibandla (2012) perceived that foreign direct investment (FDI) plays an important role in India's growth dynamics by expanding markets, reducing transaction and transformation costs of business through adoption of advanced supply chain and benefit consumers and suppliers (farmers). The author found that some of the wholesalers and small Kirana stores adopted innovative practices in procuring and selling goods in response to competition from the large retailers which will improve the overall organization of the markets.

3. DESIGN OF THE STUDY

It is estimated that India will need substantial

investment to develop infrastructure for supporting retail development. A significant portion of this will need to be earmarked for up gradation of the supply chain for fruits & vegetables. An 11th Plan working group has estimated a total investment of Rs. 64,312 crore in agricultural infrastructure. A storage capacity gap of 35 million tonnes has been assessed, requiring an estimated investment of Rs. 7,687 crore. A major portion of this investment is expected to come from the private sector, for which an appropriate regulatory and policy environment is necessary. Concerns are also raised that the growth of organized retailing leads to displacement of small and street vendors, changing cultivation practices, monopolization, hijack of retail democracy and the like.

Driven by the contrasting realities pertaining to the corporate retailing of fresh fruits and vegetables, an empirical study has been taken up in Bangalore, one of the most happening retail destinations in the country, to get the large retailers' take on various issues pertaining to retailing fresh fruits and vegetables. The primary data collection tools consisted of structured interview schedule, personal discussions with the top executives and personal observation of 8 large retail organizations, picked by convenient and judgmental sampling method, engaged in retailing of fresh produce in Bangalore. Qualitative and quantitative data were collected on the most pertinent issues such as procurement and supply chain, marketing strategies adopted by the retailers, prospects of growth, key challenges faced, and the respondents' personal views on various issues in modern retailing. As the study is largely based on data collected from 20 executives representing 8 retail organizations, the findings are to be generalized with care and discretion.

4. DISCUSSION OF RESULTS

I: Respondent Profile

The survey gathered the opinion of 20 executives representing 8 organisations engaged in fresh produce retailing in Bangalore. While the basic data of respective organizations was gathered from top and middle level executives like general manager, merchandise head, category manager and the like, the opinion on various issues in modern retailing has been solicited from other executives too. About 80 percent of respondents are males, aged between 25 and 50 years, designations ranging from general manager to store manager and category in-charge.

The following table provides a bird's eye-view of the operations in sample organizations.

Table1: Table showing the brief profile of respondent organizations

	Bigbazaar	*Foodworld*	*Bigbasket*	*Heritage Fresh*	*More*	*Namdhari*	*Nilgiris'*	*Smart Retail*
Year of Commencement	2006	2001	2010	2006	2005	1998	2000	2007
No.of outlets	15	37	Online	12	4	20	60	26
Total Floor Area in SFT	60000	40000	NA	36000	30000	40000	60000	48000
Space provided	7-8%	10-15%	NA	20%	15%	40-45%	7-8%	15-20%
Revenue generated	10%	15-20%	40%	20%	14%	60%	12%	NA
Margin in F&V	10-12%	11%	30%	18%	10-12%	10-15%	14%	16%
loyal customers	75%	50-60%	90%	NA	70%	70-80%	50%	60%
Procurement FFVs: -Own/ leased lands farmers wholesalers/mandi -Others	 Nil 60-65 20-25 10-15	 Nil 40 60 Nil	 Nil 80 20 Nil	 25 20 55 Nil	 Nil 25 40 35	 60 35 5 Nil	 Nil 100 Nil Nil	 Nil 80 20 Nil
Profile of customers	A,B & C	A,B & C	A & B	A & B	A,B & C	A&B	A&B	A,B &C
Change in last 2 years	Slightly decreased	Stable	Improved	Increased by 10-15%	Stable	Slightly declined	Stable	Declined by 4%
Turnover per month in MTs	1500-1600	550-600	200	500	1000	2000	300-400	1500
Measures for promotion of FFVs	Wednesday bazaar, weekend offers, loyalty card etc.	Weekend offers, Deal of the Day etc	Month end Offers,	Wednesday and weekend offers	Wednesday offers, lucky draw, loyalty card	Few	No aggressive promoton	Wednesday and weekend offers

Mode of collaboration with small players	No	space sharing	customized supplies	No	Seasonal franchise	Sourcing and space sharing	No	No
Plan tdie up foreign/ large domestic players	Probably yes	Probably yes	Perceives no value addition	No	No	Informal ties with Wal-Mart,	No	No
Dump/ waste management	7-8%	8-10%	<1%	7%	4%, aim to get 3%	4-5%	5%	8%, aim to get 6%

Source: Primary data

Analysis and interpretation

As per the data shown in table 1, it is understood that all the organizations forayed in to organized retailing of fruits and vegetables, in Bangalore, in the new millennium, except Namdhari Fresh, which commenced its operations in 1998. Nilgiri's is having highest number of outlets followed by Foodworld and "Smart Retail", while online retailer "Bigbasket" has no store at all. In terms of procurement from own/ leased land, total floor/ shelf space provided for fruits and vegetables, revenue generation from the segment and quantum of fresh produce being handled, Namdhari Fresh is far ahead of its competitors, but it largely focuses on middle and upper strata of society who are more health and quality conscious.

Bigbasket, the online retailer, seems to be making highest margin in the group, apparently with the absence of store management costs, followed by Heritage Fresh. Half of the respondent retailers are reaching out to all types of customers- A, B and C class, (Bigbazaar, More, Foodworld and Smartretail), while the others focus on niche segments. Bigbasket and Heritage Fresh saw improvement in prospects over last two years with rising consumer awareness and deeper penetration, three retailers stated their business to be stable, while the remaining three firms witnessed decline in business due to intensifying competition.

About 50% of the respondents do not see any major gain or possibility on continuing basis to collaborate with the small/ unorganized retailers, whereas the rest are already into formal or informal collaboration with the small retailer through space sharing, seasonal franchising and the like. As to collaboration with large/ foreign retailers, many appear to feel that the decision depends on future opportunities and exigencies. The average quantum of dump/ waste across the firms is at 6%, which the organisations are striving hard to bring it down to 3-4%.

Mr Radha Krishna, category manager at Bigbazaar, says that dump is inevitable so as to give touch and feel experience to the customers; however, 'the same can be reduced over time by proper grading and packing', he adds. Though most of the organizations are procuring the fresh produce directly from farmers, the quantum is insignificant, a vital step towards achieving greater supply chain efficiency. However, the middlemen/ wholesaler/ mandi/ the wet market continue to exercise significant control over the trading of fresh produce.

All the retailers are actively promoting the category with special day offers, weekend offers, reward points on loyalty cards and the like, however Namdhari fresh remained indifferent to the practice of aggressive promotion.

II: Summary of responses from sample organizations on marketing strategies of Fruits and Vegetables:

- **Pricing policy**

Many organizations follow benchmark pricing which is arrived by considering farm gate prices, transportation costs and the like. However, Bigbazaar follows Everyday low price strategy- EDLP, though prices are further reduced on Wednesdays and weekends, and claims selling F&V at 20% below the market rate on average. Heritage Fresh is firm on not selling anything for loss, as pricing is somewhat technical issue for the firm. The company's category head Mr BV Manjunath Reddy says that retail business considers costing of every visible and invisible area of operation to achieve optimum efficiency and derive profit. More pursues a highly competitive pricing strategy, while Nandhari Fresh prices its products according to market trends.

- **Supply chain infrastructure available in Bangalore**

The sample organizations are not on equal footing with regard to supply chain infrastructure. Namdhari Fresh has robust infrastructure including pre-coolers, packing house, cold-storage, collection centers, distribution center, packing house, own transportation and the like, Heritage Fresh having distribution center, collection center, packing house & ripening chambers, that outsourced

transportation, Bigbazaar is equipped with cold storage, farmer consolidation center, distribution center, foldable craters, own refrigerated vehicles and the like. Some use rented godown facility at Safal mandi near Hoskote, and outsource transportation so as to optimize investment and costs. Firms with strong infrastructure are trying to minimize the time span between harvesting and store despatch.

- **Strategic importance of Bangalore market**

All the respondents consider Bangalore market to be strategically important for F&V segment for further expansion, new investments, establishing more advanced and sophisticated formats of retailing. The reasons cited include vibrant market, vast human and material resources, scope for wide range of F&V, nearness to sourcing and market, high purchasing power and quality consciousness of consumers and the like

- **Perception towards competition within large retail sector**

Few retailers like Smart Retail & Bigbazaar downplay the competition from large retailers claiming that the competitive pricing, quality and wide range of products they offer work in their favor, while organizations like Namdhari Fresh would want to keep a close watch on the competitors as they grow strong. Online retailer Bigbasket believes that though competition is growing, there is a space for everyone in the market, the market is not mutually exclusive and healthy competition is good for the consumer.

- **Perception towards competition between organized and unorganized sector**

Many believe that breaking wet market is the toughest challenge. According to Mr Radha Krishna, out of 120 truckloads of fresh produce arriving at Bangalore every day, only 20 trucks go to organized stores, while 100 trucks are sold in the conventional wet market. Dr D Vishnuvardhana, the Director of Smart Retail perceives push cart and street vendors to be a bigger challenge to organized retailers and it is growing stronger given the unique advantages that they enjoy- personal touch, accessibility, credit facility, low cost of operations etc. Niche marketers like Bigbasket, Namdhari, etc. are undaunted of competition from small retailers, believing that their quality, range and service are the key differentiators.

- **Rejection issues**

The respondent firms have a well defined procurement policy, which is being conveyed to the farmers/ supplier/ vendor. In case of Bigbazaar, the procurement policy is not very stringent and detrimental to the interests of farmers, but no compromise on quality. Continuing farmer education is taken up to meet quality standards and customer demand. Smart Retail procures only "A" grade goods and rejects others at source to maintain high standards of products sold to the customer. Bigbasket procures most of the produce since farmers bring high quality as per standards set by the company, while Heritage Fresh rejects 20-30% of produce brought by the vendors after meticulous quality checking.

- **CRM practices**

All the firms covered under survey adopt Customer Relationship Management (CRM) practices, by being well accessible to the consumers through e-mail, toll-free number and dedicated customer service departments in the respective stores so as to resolve any issue with the customers in an amicable manner. However, it was found that the firms are not being proactive in conveying latest information, offers etc to the customers through SMS alerts, e-mails etc. Heritage Fresh did that during initial phase of their entry into Bangalore market and the activity has been revived after long gap. Bigbasket follows no frills return policy, to take return of goods if the customers are not satisfied, without questioning. As an innovative customer service initiative, Bigbazaar launched "Seva" a pilot project at select outlets in Bangalore, in which cutting and processing vegetables is done by staff without extra cost.

- **Perceived opportunities and challenges in FFV retailing**

Table2: Summary of respondents' views on opportunities and challenges in FFV retailing

Opportunities	Challenges
• Huge potential • 80% market uncovered • Grabbing another 10 to 15% wet market by entire organized sector makes significant difference • scope for growth in turnover	• breaking wet market • rising competition from small and large players • dump reduction • possible decline in production of F&V in Bangalore region due to shift in occupational patterns and urbanization, climate change and the like

• Ever increasing consumption of F&V by consumers • Rising demand for imported F&V • Scope for reducing wastage due to improved post-harvest infrastructure • Increasing quality consciousness among consumers • Favorable policy environment • Process excellence achieved by the organizations benefits everyone in the fray	• Wastage at store (inevitable for providing touch and feel experience) • constantly meeting rising customer expectations • huge competition and declining margins • increased demand for organic F&V

Source : Primary data

III: Respondents' views on various issues in modern retailing

Table 3: Respondents' views on various issues in modern retailing

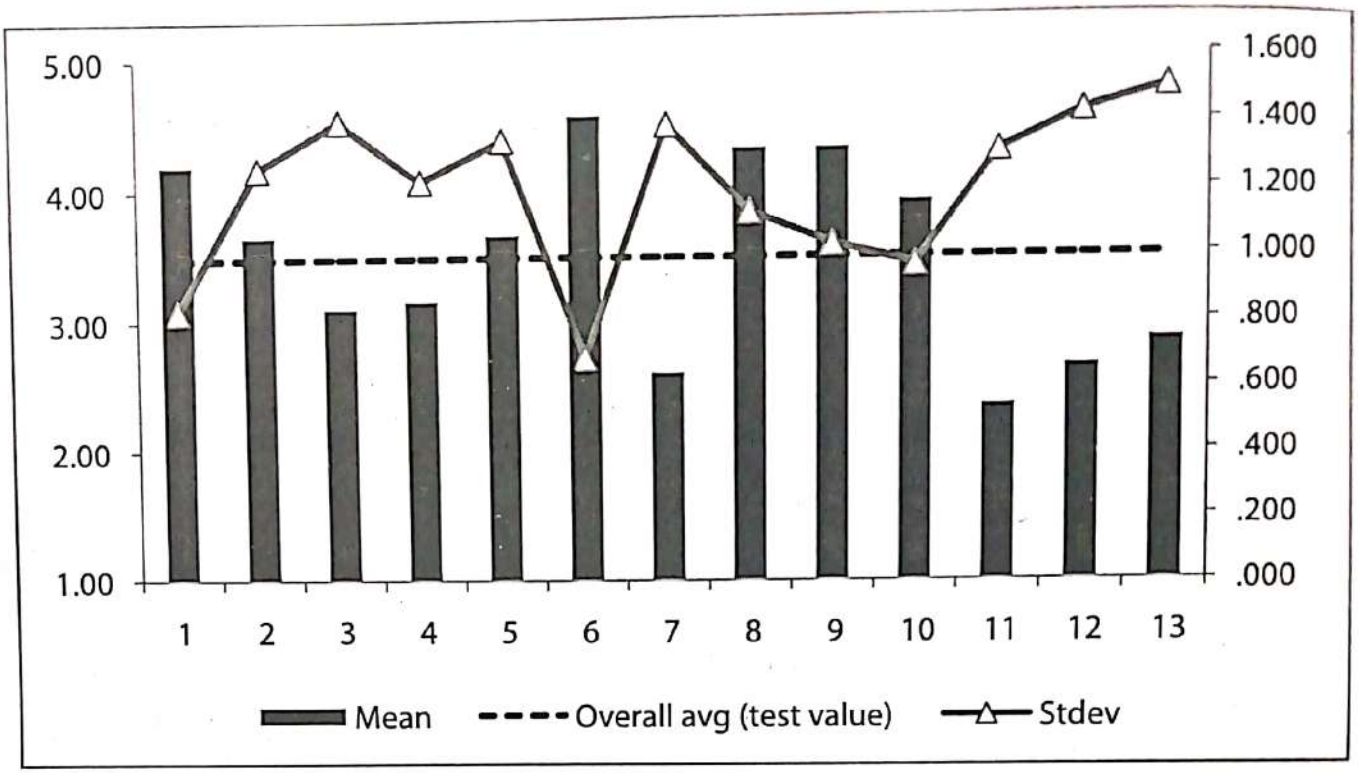
SA-Strongly Agree, A-Agree, N-Neutral, DA-Disagree, SDA-Strongly Disagree, Std.dev-Standard Deviation, Sig value- Significant Value

Sl No	Perception towards impact of organised retail stores on various aspects of retail landscape in India	SA	A	N	DA	SDA	Mean	Mean Diff	Std. Dev	sig value @5%
	FDI in retailing will be beneficial for economy and consumers	9	6	5	0	0	4.20	.720	.834	.001
	FDI in retailing will lead to better products and services to consumers at low cost	7	4	5	3	1	3.65	.170	1.268	.556
	Corporate retailing will lead to concentration of resources and wealth	3	7	3	3	4	3.10	-.380	1.410	.243
	Corporatisation of retailing will lead to price rigging	2	8	3	5	2	3.15	-.330	1.226	.243
	Corporate retailing of FFVs will lead to change in cropping patterns of farmers	6	7	4	0	3	3.65	.170	1.348	.579
	Large retailers provide better services to consumers compared to small traders	13	5	2	0	0	4.55	1.070	.686	.000
	large retailers dictate terms to the farmers/ producers	2	4	4	4	6	2.60	-.880	1.392	.011
	Large retailers operate with greater efficiency	13	3	1	3	0	4.30	.820	1.129	.004
	Large retailers will create huge employment opportunities	12	4	2	2	0	4.30	.820	1.031	.002
	Large retailers are More ethical in their behavior	7	5	7	1	0	3.90	.420	.968	.067
	Large retailers encourage wasteful spending	1	4	3	5	7	2.35	-1.130	1.309	.001

	Growth of large retailers result in elimination of small traders	3	4	0	9	4	2.65	-.830	1.424	.017
	Large retailers operate in More environment friendly manner	5	1	4	6	4	2.85	-.630	1.496	.075

Source: Primary data

Chart 1: Mean, test value and standard deviation of Respondents' views on various issues in modern retailing



Analysis and Interpretation

Table No: 3 and subsequent graph show the respondents' views on various issues of modern retailing. The mean ranges between 2.35 and4.55, while the mean of the means (test value) is 3.48. SD ranged from .834 to 1.496. The statements such as 'FDI is beneficial to the consumers and economy', 'large retailers are capable of providing better services to the consumers than conventional retailers, operate with greater efficiency and provide huge employment opportunities', etc. are strongly agreed with means of 4.2, 4.55, 4.3 and 4.3 and statistical significance of .001, .000, .004 and .002 respectively. Most of the respondents denied the statements such as 'large retailers dictate terms to the farmers; they encourage wasteful spending and drive out small retailers' with mean values of 2.60, 2.35 and 2.65 and statistical significance of .01, .001 and .017 respectively. Majority of them disagreed or strongly disagreed to the statement that large retailers are more environment friendly than the small vendors, admitting that they need to come out with more concrete initiatives to conserve the nature of precious resources.

5. SUMMARY OF FINDINGS

The study revealed growing significance of fresh fruits and vegetables category in grocery and food retailing of organized retailers. The respondent organizations have provided minimum of 7 % and up to 40% of store space of food division for fresh produce, with corresponding share of 10%- 40% of revenue generated. It can be seen that the retailers with lesser value of dump are retaining higher margin. The retail chains had mixed experience as to business prospects and margins in the last two years. Collaboration with small producers, vendors, fellow corporate entities and foreign retailers would pick up as the competition intensifies. The firms are eyeing greater pie of wet market with promotional efforts alongside suitable customer friendly moves and CRM practices. Supply chain efficiency is yet to go up substantially as the procurement is still largely dependent on middlemen, mandi or wholesale market. Investments in supply chain and infrastructure for handling fresh produce

are yet to take off.

6. SUGGESTIONS

- It is suggested that organized retail sector be given further boost for ensuring more investments in front-end and back-end fresh retail supply chain, with specific time limits and riders, which substantially reduces farm losses and boosts the quantum of fresh produce available for consumption and exports.
- Strict vigilance to be exercised against possible cartelization of retail sector by the large players and suitable amendments in laws should be brought in so as to prevent and deal with the abuse of power.
- Large players should explore all possible means to develop and make use of alternative sources of energy as growth in fresh produce availability should not lead to deepened energy crisis. Similarly, more foot prints into large stores should not mean more carbon footprints on the mother earth.
- Better store management practices, and training and sensitisation of employees in the modern formats could further rise the footprints and build loyal customer base.
- The large and small players can work together in possible areas through arrangements like franchising, joint procurement and the like, instead of working against each other, on fair and transparent terms, with suitable legislation in place to prevent conflict.
- There is every need for growth of large retail sector to tap the untapped potential, to bridge the gap between growing demand for quality fresh produce and supply levels, and to build the much needed retail infrastructure. But it should be economically viable, socially desirable and environmentally sustainable.
- Foreign Direct Investment in retail sector is bound to change the rules of the game, and any exploitation and oppression through acts like contract farming, contact farming and paradigm shift from food crops to commercial crops at the instance of MNCs must be constantly watched and promptly deterred.

7. CONCLUSION

Organised retailers do have a more significant role to play in meeting the growing demand for fresh produce in time to come. It can be achieved and sustained by building and strengthening supply chain infrastructure, working together with the other stakeholders through inclusive policies and programs, improving operational efficiency, and most importantly, providing the quality to produce to the customer at affordable prices.

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