

PROJECT
ON

“Survey of Distribution Channel of the Food Products in Kolkata Metropolitan Area and Identify New Opportunities”

By



Institute of Leadership, Entrepreneurship and Development (iLEAD)

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Funded by

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EXECUTIVE SUMMARY

Distribution channel is the path or network through which goods and services are transferred from the manufacturers to the final consumers. A distribution channel can include wholesalers, distributors and retailers. Channels are broken into direct and indirect forms, while a "direct" channel allows the consumer to buy the good from the manufacturer, and an "indirect" channel allow the consumer to buy the good from a wholesaler. The major focus of this work is to identify the distribution channel of the processed food products (Jam, Jelly, Biscuit, Sauce, Noodle, Chips) in the Kolkata Metropolitan area and adjacent areas in Howrah district, and collect demographic information about manufacturers, wholesalers, distributors and retailers of these products.

Primary data was collected from these Distributors, Wholesalers and Retailers through Questionnaire and Interview methods. Purposive Sampling method was applied to select the sample from various areas of Kolkata and Howrah districts. The major findings of this study is that the market of processed food products in the surveyed region is :

1. significantly biased in favour of cash transaction
2. wholesalers have the highest opportunity to influence the market
3. the creditors dominate the market and
4. the small manufacturers of these products face lot of difficulty to penetrate the market.

INTRODUCTION

The processed food industry in India is presently valued at \$39.71 billion (Rs. 2,476.8 billion) and expected to grow 11 per cent annually to reach \$65.4 billion (about Rs. 4 lakh crore) by 2018, according to a research report jointly published by IIM-Calcutta and Academic Foundation in October 2015. The report further confirmed that, the food and grocery constitute a substantial part of India's consumption expenditure which is 31 per cent of the consumption basket. "India's retail market is expected to grow to \$865 billion by 2023, which is presently valued at \$490 billion," the report stated. Though India is one of the largest food producers in the world it only accounts for 1.5% of total worldwide food trade. This indicates vast scope for both investors and exporters. Some of the foreign firms have successfully established backward linkages and are working with farmers and contract manufacturers.

In West Bengal the main products in the "Processed food" category are Jam, Jelly, Pickle, Sauce, Papad, Potato Chips and Flecks, Canned sliced fruits, Squash, etc. There are many established national as well as regional brands but they have captured mainly the urban and elite markets and for a quality product, there is a vast market which can be penetrated by offering products in competitive prices. Apart from a growing household market, other lucrative segments are eateries, restaurants, fast-food joints, etc. Marketing would play a crucial role and placement, publicity, commission to retailers, etc. are important aspects for the growth of this market. The aim of this project is to study the entire distribution channel of the market of the "Processed food" in Kolkata and identify opportunities to introduce new products and increase the market.

BACKGROUND OF THE STUDY

Distributors, and even representatives, sale agents, brokers and retailers have acted as a reliable source for most of the manufacturers, as the latter do not believe in selling the product directly to end users, if one goes by the interpretations of Hughes and Ahearne, 2010. While a different school of thought by Kotler and Keller, 2008 opine that a marketing channel often plays a vital role that concerns the distributors and the company. PS Kalafatis in 2000 said that increased size, improved level of product knowledge, technical competence and several other factors have increased the importance of channel intermediaries. Retailers create promotional displays and advertising, create one-stop-shopping convenience and a pleasant shopping environment, all of which increases demand for the manufacturer's product (Desiraju and Moorthy, 1997). The central position has been often occupied by the Retailers for some industries due to the successful launching of retailer brands, for better control of distribution and adding more value to the distribution supply chain (Burt, 2000; Dawson, 2000; Elg, 2003).

Changing Retailer Characteristics

Like other industries, the retailing industry too has been undergoing a sea of changes as days roll by. In the words of Hingley et al., in 2006, a blend of technological, social, economic, political factors, mergers, acquisitions and internal restructuring have intensified the level of competition. Changes have occurred in various areas of the business and, in almost all the cases, they have achieved importance. From customers point of view the retailers are the most visible entity of the supply chain. Dobson et al., in 2003 stated that any development in the supply chain level create impact on both the suppliers and the choices of the consumers.

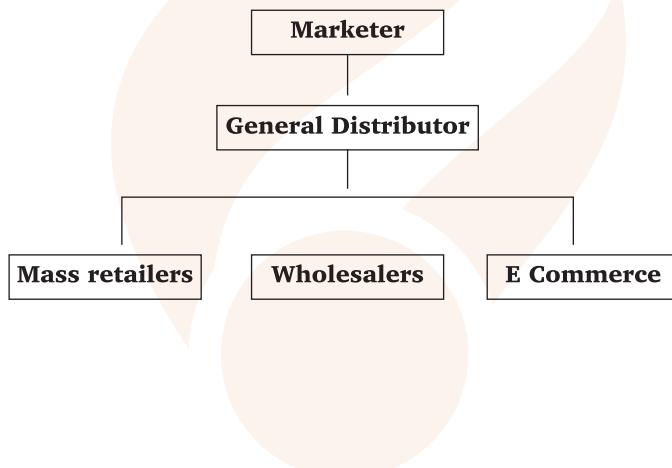
The size of retailers are the most important thing to be talked about. Surveys and data reveal that over the days large retail chains have emerged, commanding significant share in national markets. If one considers, the example of Walmart, having sales of \$405 billion in 2009-2010 and with 7820 stores worldwide (Walmart, 2010), it suggests that some retailers continue to pursue the benefits of having a large scale. Synergies in distribution and customer acquisition, enhanced infrastructure sharing, and cost savings resulting from better resource deployment are usually cited as the benefits of growing retail scale (Dragun and Howard, 2003). Apart from the traditional economy of scale, large size gives retailers potential power over many aspects of buying relationships (Dawson, 2000). Size, and the resulting buying power, allows large retailers to obtain more favourable terms from suppliers (Chen, 2003), as well as to charge suppliers directly for access to their shelf spaces, for instance through listing charges or shelf-space fees (Dobson et al., 2003).

Terms like 'hypermarkets', 'big-box retailers', 'discount retailers', 'mega-retailers' and 'category-killers' have cropped up clubbed with the development of bigness. There is commonality among these retail formats in terms of their physical size but, more importantly, these retail formats represent different retail operations on several dimensions, including breadth and depth of product assortment, level of service, price policy and customer demographic profile (Arnold and Luthra, 2000).

The success of big retailers has been based on particular management systems and philosophies, for which centralisation has been a key mechanism, both for implementation strategies and for achieving economies associated with size (Dawson and Shaw, 1989). A high degree of management centralisation,

covering central buying operations, labour policies, advertising, administration and distribution, has a number of implications related to developing and maintaining a quality image across a retail chain. According to Burt (2000), the centralised operational decisions relating to product assortment, merchandising, store layout, pricing and promotion, allow retailers to develop a clear, consistent image and market position for their customers. It can be said from the above implications and findings that this kind of a management system does build up a coherent set of core values through the retail offer and ensure that these values are delivered consistently (Burt, 2000). Similar to the concept of centralisation, researchers have also used standardisation to describe retailers' strategies (e.g., Rigby and Vishwanath, 2006). For decades, dominant chains such as Walmart and Best Buy have pursued single-minded strategies of standardisation, unifying their store format, merchandise mixes and operating and marketing processes.

Fig: 1 Process of Distribution



It can be explained in a more detailed way by the following ways encompassing several aspects of distribution which includes Market Analysis, Distribution Analysis and Client Analysis.

Table 1 : Relevance of Market, Distribution and Client Analysis

	KEY INSIGHTS
Market Analysis	<ul style="list-style-type: none"> • Moderately short channel length, low number of layers • End channels : <ul style="list-style-type: none"> – High priority: stores, beauty shops, large workshops and gas stations (only crucial for fuel additive business) – Medium priority: Fast fitters, supermarkets are becoming increasingly important, e-commerce rapidly expanding – Low priority: Small workshops • Current market potential in coastal provinces of east China • Future market growth in mid-western regions-
Distribution Analysis	<ul style="list-style-type: none"> • 3 types of distributors with different geographical reach <ul style="list-style-type: none"> – General distributor (nationwide) – Tier-1 dealer (provincial) – City dealer (city level) • Direct competitors use <ul style="list-style-type: none"> – Direct operations through headquarters, offices – Indirect operations through general distributor • Management factors largely unknown for tier-1 and city dealers
Client Analysis	<ul style="list-style-type: none"> • Product portfolio positioned in middle-high price segment • Little information about client internals (objectives) • Unaware of who end consumer is, what channels are served • Indirectly operating through single general distributor • Limited in resources (staff, finances)

OBJECTIVE OF THE SURVEY

The broader objectives of the project are :

1. To study the market distribution channels of food product items like biscuits, noodle, jelly, sauce, chips in the Kolkata metropolitan and Howrah.
2. To collect demographic information regarding manufacturers, wholesalers, distributors and retailers in different parts of the city and Howrah.
3. To find out the process of distribution, whether commission systems involved, existing system of practice in the distribution, payments recovery etc.

METHODOLOGY

The project is based on a field survey in which several primary data is being collected compiled and analysed to understand the behavior of several channel members who function as link between marker and consumer. Primary data has been collected from the Distributors, Wholesalers and Retailers who deal with the “Processed food products” like Jam, Jelly, Sauce, Noodle, Biscuit and Chips. The survey was conducted during the period from 30.11.2015 to 14.12.2015. Data has been collected using Questionnaire & Interview method through Purposive Sampling method from various areas of Kolkata and Howrah districts shown in the following table. One blank questionnaire is given in the Appendix.

Data were collected by students of iLEAD, Kolkata, following a briefing session. The project was brought to a successful completion. through honest approach and great determination by the students working both as a team as well as individually.. Each student had been given on average three areas of the city and Howrah to meet the wholesalers, manufacturers, distributors and retailers. To monitor the overall data collection and check the authenticity of the data, team had to report after every three days on the progress of the project heads. The reporting sessions were helpful in updating progress, providing feedback to the members based on field observation, discussing data inconsistencies, and problems faced by them.

FINDINGS

Table2 reveals an uneven distribution of different pattern of channel members.

Table 2: Area wise distribution of Distributors, Wholesalers and Retailers (in %)

Area	Distributor	Wholesaler	Retailer
Burrabazar	26.09	8	10.53
Central Kolkata	-	-	7.89
North Kolkata	21.74	20	7.89
South Kolkata	4.35	36	11.84
Park Circus	-	16	35.43
Salt Lake	-	-	7.89
Howrah	47.83	20	18.42

Product Oriented Classification – It has been found that Distributors are having a better penetration among the surveyed products whereas; wholesalers and retailers are more strong in selling Biscuit and jam-jelly respectively. Further, distributors, wholesalers and retailers are least in control of chips which denotes that the product has got a very weak acceptance among the target population. It can be assumed that, biscuits and Jam-jelly are the commonly demanded products from the retailers. Naturally, wholesalers are stocking more number of both small and big brands of biscuits. It may further be concluded that for the self- interest, retailers are pushing the Jam-jelly and biscuit brands.

Table3 : Product wise distribution of Distributors, Wholesalers and Retailers

Product	Distributor	Wholesaler	Retailer
Biscuit	25%	84%	24.05%
Jam, Jelly	16.67%	8.33%	65.82%
Sauce	50%	4.17%	5.06%
Noodle	16.67%	4.17%	3.79%
Chips	8.33%	4.16%	1.26%

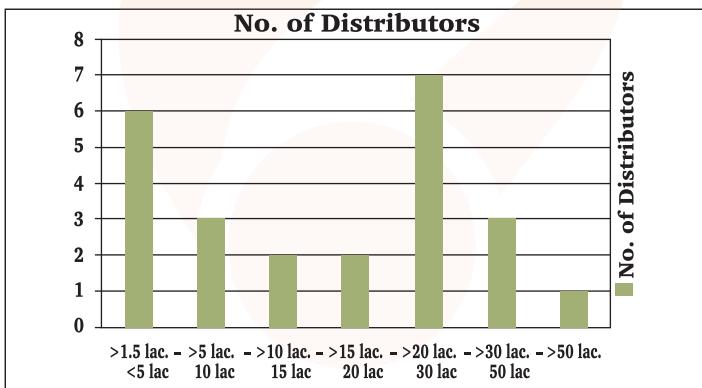
The above table denotes that, Wholesalers are having a dominating control on the biscuit market and weaker presence in jam-jelly, sauce, noodles and chips market. Similarly, Distributors have more control on sauce market, moderate in biscuits and noodles market but least on chips market. Even, retailers have strong control on jam-jelly market but moderate control on biscuit market and very weak control on sauce, noodles and chips market.

The primary data reveals few categories of observation for Distributors, Wholesalers and Retailers.

DISTRIBUTORS

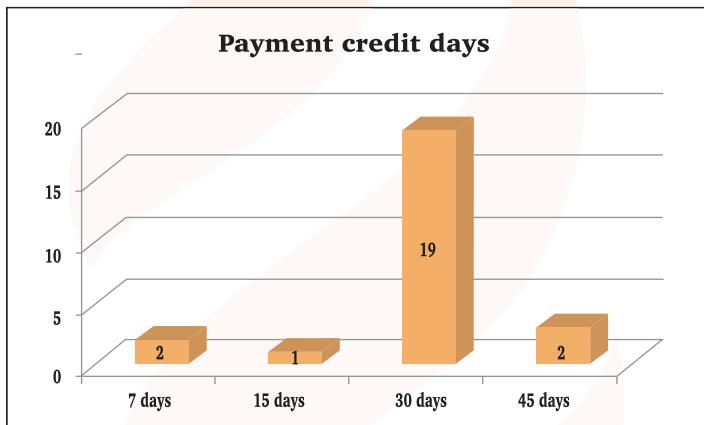
The studied population of distributors basically operating from North Kolkata and North Howrah have identified of promoting Biscuit Brands of Bisk firm, Britannia, Raja; Noodles brands of ITC & Nestle, Sauce brands of Delmond, Chemica, Priya, Topse, Kissan, Maggi, Yeppi; Potato chips marketed by Ganesh, Fritolay, Pepsico and Jelly from Weikfield, Shera, Fruit Plaza. They are dealing with such kind of products for more than 5 years based on intermediary and short term agreements and mostly using their own vehicle using an average area of 500sq.ft. or more. They are operating equally both on Business to Business (B-B) and Business to Consumer (B-C) levels with an average payment credit cycle of 30 days. The average primary sales of the respondents are being identified that falls into different categories. Interestingly, there is a mismatch in yearly secondary sales generated upto max. Rs.50lac. supported by average 8 salesman who are enjoying varying degree of profitability ranging from 3 – 5% (avg. 5%) that is shown in the contemporary trend of sales. These people are more versatile and handle more generic products and love to experiment with new products. Interestingly, they are operating on an extended business credit period of 60 days (avg. 30days) that enables them to maintain their yearly secondary stock even upto Rs 2.5 crore (avg. 50lac.) supported by an average primary of Rs.50 lac.

Fig 2: Value of primary stock holding by Distributors



The previous bar graph illustrates the value of primary stock holding by Distributors. It comes to knowledge that the highest range falls within a category of 20 to 30 lakhs, followed by a group which is higher than 1.5 lakhs but less than 5 lakhs, in line, the next category falls within 30 lakhs to 50 lakhs, the next group talks about the range varying between 5 to 10 lakhs, 20 lakhs to 30 lakhs, 15 to 20 lakhs and 10 to 15 lakhs.

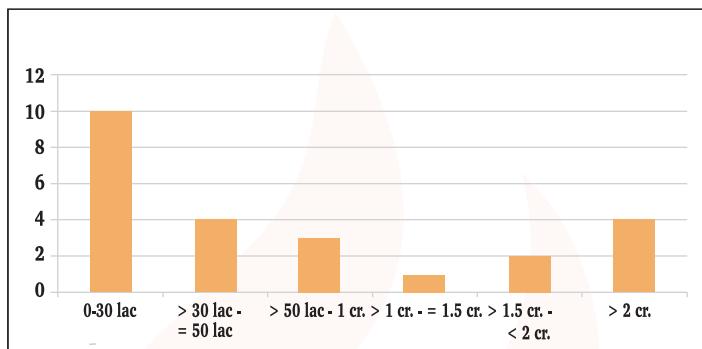
Fig 3: Disparity of payment credit days enjoyed by Distributors



The above diagram illustrates the disparity of payment credit days, and it is quite understandable that the credit days have been illustrated as 19, 3, 2 and 1 respectively. The X axis denotes the no. of days, while the Y axis denote the no. of people. On an average, distributors are enjoying minimum 4.06% and maximum 7.84% as commission with an average storage capacity of 176.66sq.ft. They do their business transaction with their next channel member by cash.

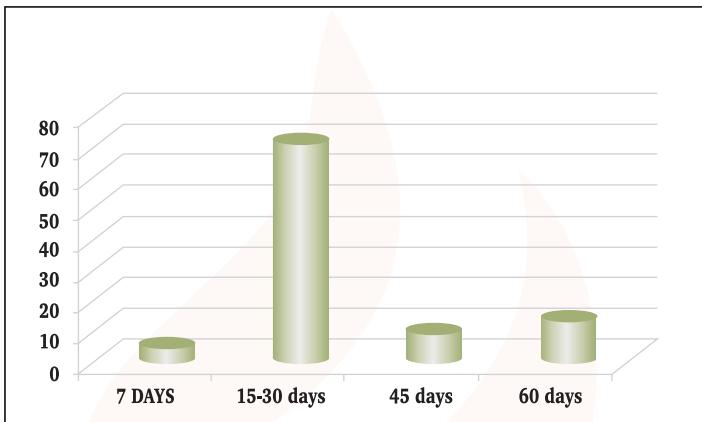
WHOLESALE

The respondents operating from Burabazar, Park Circus, Howrah, Ballygunj, Bhawanipur and Kalighat have identified of promoting Biscuit Brands of Britannia, Raja, ITC & Parle; Noodles brands of ITC & Nestle, Sauce brands of Kissan, Maggi, Heinz, Yeppi; Potato chips marketed by Ganesh, Fritolay, Pepsico and Jelly from Apollo. They are dealing with such kind of products for more than 20 years based on intermediary and short term agreement and mostly using their own vehicle using an average area of 150-200sq.ft. or more. They are operating equally both on Business to Business (B-B) and Business to Consumer (B-C) levels with an average payment credit cycle of 30 days. The average yearly primary sales of the respondents are being identified which falls into three categories i.e. 1.5- 10lac., 10 – 20lac. and more than 20lac. Interestingly, there is a mismatch in secondary (yearly) sales that is generated upto max. 15lac. supported by 4-6 salesmen and they are enjoying a varying degree of profitability ranging from 2 – 15% (avg. 5.95%).

Fig 4: Disparity in Primary Stock Value of Wholesalers

The primary stock value of wholesalers is being illustrated in the above diagram, the ranges vary from greater than 2 crore, 1.5 to 2 crore, 1 to 1.5 crore, greater than 50 lakhs to 1 crore, 30 lakhs to 50 lakhs and zero to 30 lakhs.

On an average they are dealing with 1279 customers with an average store facility of 911.5 sq.ft. and they are enjoying a profit margin that varies from 5-7%.

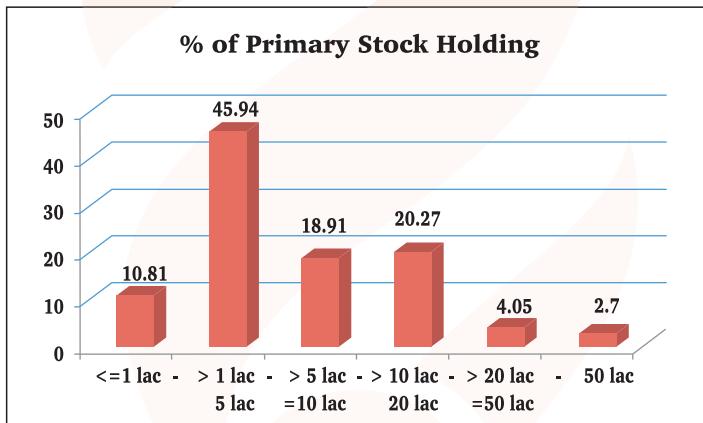
Fig 5: Disparity in Payment Credit Days of Wholesalers

Percentage of distribution is being illustrated in the above diagram, which does lend an eye to the disparity in Payment Credit Days of Wholesalers. The period between 15 to 30 days holds highest position, which is followed by 60, 45 and 7 days.

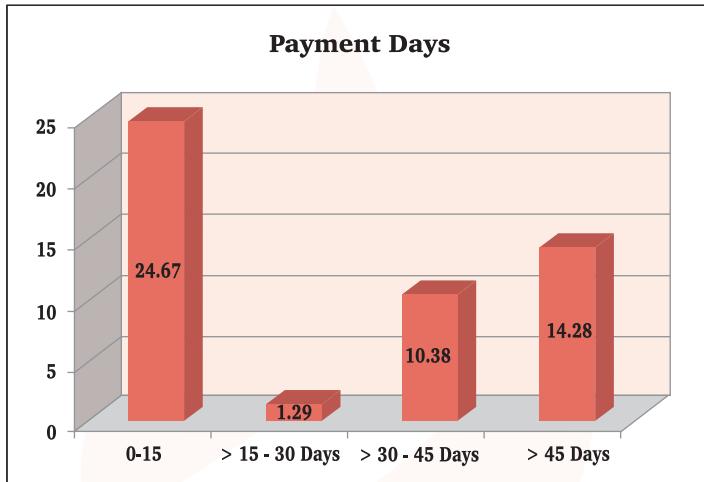
RETAILERS

It has been found that on an average, retailers are operating from a storage facility of 229.88sq ft. For generic products retailers are enjoying a profit margin varying from 10-25% whereas in case of branded product it ranges between 3-8%. The retailer value shows the disparity in Primary Stock Value of Retailers. Retailers are more concentrating on jam-jelly market but moderately on biscuit market and poorly on sauce, noodles and chips market. It may be a compulsion and not a choice which is mostly decided by the final customer and not by the retailers even being the last member of the distribution channel. The studied population of retailers are basically operating from all corners of Kolkata at their corresponding retail premises with an average yearly turnover of 11lac. with a profit level of 10 - 15%.

Fig 6: Disparity in Primary Stock Value of Retailers



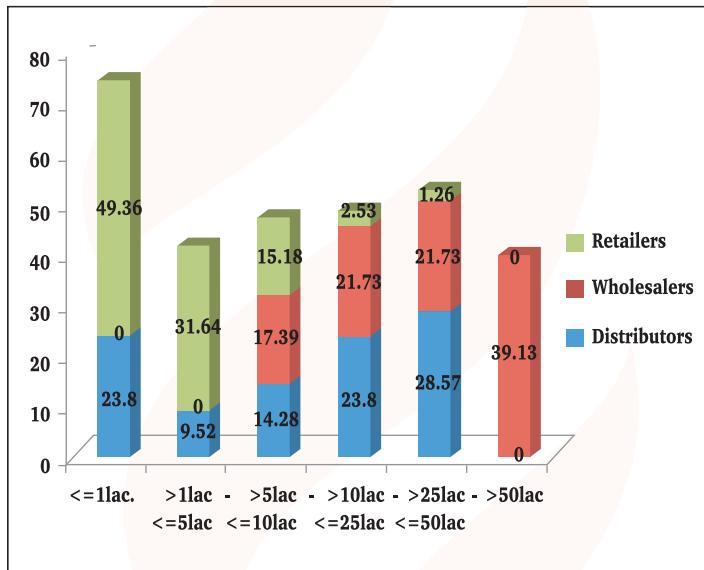
The ranges as reflected in the above diagram show that the solely dominating position has been acquired with a percentage of 45.94, which is succeeded by 20.27, 18.91, 10.81, 4.05, and 2.7 respectively, belong to the category of greater than 1 lakh, yet less than 5 lakhs, more than 10 lakhs, but less than 50 lakhs, greater than 5 lacs, but equal to 10 lakhs, lesser than or equal to one lakh, greater than 20 lakhs and equal to 50 lakhs, and finally greater than 50 lakhs.

Fig 7: Disparity in Payment Credit Days among Retailer

Here in this diagram, as we talk about the disparities in Payment credit days among the Retailers, the most dominant factor is the range between 0 to 15 days, greater than 45 days, greater than 30 to 45 days, and lastly 15 to 30 days. The values represented in the diagram are 24.67, 14.28, 10.38, and 1.29 respectively.

While discussing the secondary sales of wholesalers, distributors and retailers it has been noted from the primary data analysis that the wholesalers are holding highest monetary value of the items. Moreover, the retailers are able to sell least value of identified goods because of their restricted activity. Although the distributors have a good secondary sales but they are more committed to a single company.

Fig 8 : Disparity in Primary Stock Value of Wholesalers, Distributors & Retailers



INTERPRETATION

1. Financially compromised distributors and most of the retailers do business on cash payment and also suffer from identity crisis and fail to compete in a highly competitive market.
2. Small companies selling generic brands or big distributors selling less accepted brands of those products are offering more profit percentage to the retailers.
3. Distributor – retailer relationship plays the dominating role in the successful promotion of a brand.
4. Small retailers are interested in more cash transaction to earn and save more and these techniques are also benefitting them in exempting their business from tax.
5. Intensity of sales of those items doesn't depend on space concern of a shop rather; they depend on the access of number of customers of retail.
6. Retailers have reportedly informed regarding their inconveniences regarding a competition they face with the fair price shop i.e. Ration Shop who sells the same item at reduced price.
7. Distributors are more confined in Burabazar, Howrah(North) and Shayambazar and Ballygunj.
8. This market is mostly dominated by creditors.
9. Small manufacturers have least access to big distributors due to weak acceptance related to poor commission and poor reputation of the manufacturing brand.
10. Mainly, retailers are directly approaching the customer and they have no option to forward the product to the next member of the distribution channel but they have the highest possibility to push certain generic

products of our study provided their interests are being taken care off. Wholesalers have the highest option to influence the market of our survey.

11. Basically, retailers are operating their day to day distributional activity using public transportation system whereas, distributors and wholesalers are carrying the same activity by using own vehicle.
12. All the channel members and the retailers follow a standard procedure of storage and have the ability to deal with rodents.
13. The retailers maintain a manual system of report maintenance which differs from the Wholesalers and Distributors as they have more confidence on softwares.
14. Quantity and price discount are two basic mode of sales promotion in the case of product promotion practiced traditionally by the product promoters.
15. To reach the customers, retailers mainly depend on word of mouth or the marketing tools applied by the marketer firms which differ from the other two identified channel members, as they have more confidence on marketers supported promotional mix policy.
16. The survey also included 4 manufacturers who disclosed little information which have perfect resemblance with the distributors.
17. Biscuits can be better sold by wholesalers whereas, jam-jelly by retailers and sauce by distributors.
18. Biscuits have a bigger market among all the products irrespective of their generic or branded characteristics. Jam-jelly and sauce rank 2nd and 3rd position as far as their presence is concerned in respect of sales in Kolkata are concerned. Noodles and chips being the branded product are poorly controlled by the distribution system. It also denotes that Biscuit, jam-

jelly and sauce are better accepted as they are of daily necessity compared to noodles and chips which are having a modern outlook.

19. However it can be concluded that a marketer interested to sell biscuit must design promotional schemes that can satisfy wholesalers keeping in mind that this market offers a larger scale as it attracts least unit price among our target products in Kolkata and nearby market. Similarly, for jam-jelly, retailers are the best to be taken care of and it is so relevant to design an attractive scheme for distributor to sell sauce.

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APPENDIX**DISTRIBUTORS'/WHOLESALERS'/RETAILERS' ENQUIRY FORM**

- 1.** Name of the Distributor:
-
- 2.** Telephone No. / E-mail / Website:
-
- 3.** Office Location:
-
- 4.** Area of operation in Kolkata:
-
- 5.** No. of years or months of operation in Kolkata:
- 6.** Average Primary Stock holding/ yr (Rs. value):
-
- 7.** Average Secondary Stock holding/yr (Rs. value):
-
- 8.** No. of average customer deals monthly:
- 9.** Type of product deals:
-
-

Sl. No.	Type of Product	Branded/Generic	Name of company
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			

10. Quality standards specified on the products if any : Yes /No

Specify :

11. Type of customer deals with : B-B /Channel /B-C

12. What is your payment cycle : 30days / 45days / 60days

13. Is there any debt recovery policy : Standard / Case to case basis

14. No. of salesman working at present: Full time / Contractual

15. Do you receive any incentive from the company for promoting
the product: Yes / No

16. What is the maximum % of commission you offer to your salesman :

.....

17. Do you conduct or attend any fair for promoting or selling
your product :

18. Do you export any product outside India (mention the country name
with average rupee wise business in a year) :

19. Type of trade incentive receives at present : Quantity /Price /Other

20. Kindly mention any preference of trade incentive :

21. Type of report maintenance : Manual / Software

22. Mode of delivery logistics : Public / Hired / Own .

23. Mode of operation : Bank / Cash / Other mode

24. Average credit days receives from the manufacturer :

25. Average credit days offers to the next channel members :

26. Type of agreement with the marketer : Short term / Long term /
Intermediary

27. Maximum % of profit enjoys on products : Generic / Branded

28. Minimum % of profit enjoys on products : Generic / Branded

29. Method of promoting products : Company Sponsored / Self / Combined
 /Word of mouth

30. Store area in sq. ft. :

31. Facility of freezing (mention type & no.) :

32. Problems of rodents / insecticides / other (if any) :

33. Do you have a facility of repackaging (if any mention) :

34. Do you want to expand your business within 1yr. Yes / No
(if yes describe the nature and amount):

.....

35. Suggestion :

.....

36. Signature with date :