

**THE PERCEPTION OF SMALL RETAILER TOWARDS THE IMPACT OF SUPERMARKET
INVOLVEMENT IN AGRO-FOOD SUPPLY CHAIN:
A CASE STUDY IN BANGI**

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ABSTRACT

Supply chain system plays an important role in ensuring that there is a good flow of production distribution from producers to consumers. In Malaysia, a change from the traditional supply chain to new Agro-food supply chain have beefed up the retail sector. However, the strengthening of the retail sector is accompanied by an increase in the influx of supermarkets that give an overall impact in the form of competition for small retailers. Aspects of price, convenience, quality and food safety, and the customer relationships with retailers become the issues that are often referred when discussing about competitiveness in this retail sector. Therefore, this study aims to discuss the impact of the involvement of the supermarkets in the agro-food supply system to small retailers in terms of price competition, convenience, qualities and customer relations. A total number of 163 small retailers in Bangi were selected as respondents. This study utilized the Exploratory Factor Analysis (EFA) technique to fulfil the research objectives. Therefore, this study intends to examine whether all the variables identified are competition components for retailers. The results indicated that there are four factors that significantly affect competitiveness of small retailers. The discussion showed that the quality & safety of the products are not the main factors of competition for small retailers. Moreover, majority of respondents agreed that the presence of supermarkets in Bangi creates competitiveness to their businesses. In order to address this phenomenon, the implementation of policies and programs to help retailers are crucial. Transformasi Kedai Runcit (TUKAR) that has been implemented since 2011 should be utilized by retailers through their involvement. Modernization of small retailers had increased sales up to 30 percent, as demonstrated in previous pilot studies. The increase in sales indicated that customers wanted a comfortable, modern, bright and clean environment, similar to large format stores. The main purpose of TUKAR is to protect the welfare of retailers to remain competitive in the retail sector.

Keywords: Malaysia; competition; supply chain; small retailers; supermarket

INTRODUCTION

Food marketing in Malaysia has undergone significant changes due to the progress in the retail sector. Issues such as the use of technology, grading activities, and low production were overcome through changes in the marketing system. However, these changes led to a complex situation in the marketing system but a positive impact on individuals and society as a whole. In addition, an increase in income and urbanization has brought the existence of a "new user" who claim for quality food needs, and guaranteed clean and safe to eat.

Supply and marketing of food supply depends on the food supply chain system applied. Systematic use of supply chain system is capable of reducing the problems related to quality, efficiency and cost of production. In addition, efficient supply chain system are capable to solve the security problems associated with the issue of food supply capability (Arshad & Shamsudin, 2007). Basically, chain systems involved multiple parties to ensure the flow of products could reach the consumers. Basic supply chain systems include producers, intermediaries and consumers. However, in reality, the supply chain involves a chain of more complex systems involving wholesalers, agents, and retailers.

In Malaysia, the supply chain is at an early stage used traditional supply chain system (Arshad, 2008). These chain systems are based on activities involving various stages of production and marketing. Whereby, grading activities are minimal and controlled by the wholesalers. Weaknesses in the existing chain, it gives the idea and effort for the creating of a better chain system. Introduction of the new marketing chain system, known as the Agro-food Supply Chain Systems are capable in overcoming the weaknesses in the traditional supply chain. This chain system characterized as user orientation, global network and it has priority to grading activities (Arshad & Shamsudin, 2007).

In addition, this system focuses on the role of retailers in an effort to reduce the power of wholesalers. However, it affects the structure of the market such as market concentration, competitive pricing and marginalization of intermediaries which contained in the food chain system itself (Arshad & Shamsudin, 2007). In Malaysia, the introduction of this system affects the retail sector and caused competition issues, particularly among small retailers. Retail stores, supermarkets, night markets and premier mini are the place where consumer gets essentials goods. The sale of goods by the trader needs to be a factor to consumers in the purchase. This situation can be seen as, retail stores including farmers' markets and wet markets remains a popular retail business until the end of 2000 (Report of the 9th Malaysia Plan, 2006).

Retail activities continue to grow and become one of the sub - sectors contributing to the national economy. Initial landscape of the retail sector began with traditional stores, markets, stalls and this continued to retail stores such as supermarkets and hypermarkets (Wel et. al, 2012). In 2000, the retail sector has recorded a contribution of RM31,081 million to the Gross Domestic Product (GDP) (The 8th Malaysia Plan, 2001). The increased in consumer demand has contributed to the rise of the retail industry revenue. This situation had been identified through the increase in retail businesses such as grocery stores, supermarkets in the period of 2000 and above (Arshad, 2008).

In 2004, the retail sector showed encouraging performance in contributing to the national income. An increase of 10 % in this sector shows a positive situation in contributing to the national income (New Straits Times, March 8, 2004). The retail sector has provided more than 700,000 jobs, with total revenue of RM 57 billion (Mui et al., 2003). This situation is due to the increasing number of local and foreign retailers through the opening of new outlets.

According to the Business Times, in 2010, growth in the retail sector was 8.4%, which is equal to RM77 billion. The increase in supermarkets and hypermarkets is a driving factor for this condition (Hassan & Rahman, 2012). Changing circumstances, such as urbanization, rising incomes, lifestyles and consumer perception of product quality led to an increase in the growth of supermarkets, especially in urban areas that have a high population density (Arshad, 2008). In Malaysia, the number of modern retailers started to increase in the year of 2000 through the expansion of modern retailers from local and overseas companies (Shamsudin & Selamat, 2005). Table 1 shows the number of foreign hypermarkets and departmental store by states in Malaysia.

Table 1: Number of foreign hypermarket and departmental store

States	TESCO	GIANT	AEON BIG	JUSCO
Johor	5	8	3	4
Melaka	2	2	-	2
Negeri Sembilan	3	1	-	1
Pahang	-	1	1	-
Perlis	-	-	-	-
Kedah	5	2	-	-

Selangor	13	18	9	9
Perak	5	2	-	3
Terengganu	-	3	-	-
Kelantan	1	-	-	-
Pulau Pinang	5	1	2	2
W.P Kuala Lumpur	4	3	4	5
W.P Putrajaya	-	-	1	-
Sabah	-	3	-	-
Sarawak	-	4	-	-

Source: Foreign Trade Division (2013)

Under the National Key Economic Areas (NKEA), large-scale retail companies such as Transformers, Carrefour, Eonsave, and Giant are encouraged to venture into the retail sector. With over 10 % of Malaysia 's GDP is contributed by domestic consumption, NKEA Wholesale and Retail provides the basis for the sector to increase the amount of the Gross National Product (GNP) of the country with RM 156 billion and create a total of 454,190 new jobs by 2020 (Economic Transformation Program, 2010). The involvements of supermarkets bring benefits to consumers through the supply of quality food at reasonable prices.

In addition, the response from local customers have prompted more foreign investors to build more supermarkets in the country and contributing to the development of the retail sector. According to Tan Sri Muhyiddin Yassin (2003), many international business companies are still keen to open hypermarkets in the country despite the government temporarily freeze the opening of business. Freezing action by the government aims to control the number of modern retail stores which seem to impact competition in the retail industry (Wong, 2007). In Malaysia, the major growth drivers in the retail sector are liberalization, improvement in the domestic production, food imports and increasing reliance tourist flows (Pricewaterhouse Coopers, 2004/2005).

According to the report "Thailand 's Shopping Habits Survey " in 2001, the existence of supermarket retailers have taken over the function as the major premise of shopping options for residents in Bangkok . This condition also causes a competitive situation to small retailers. This is due to the convenience factor, and prices that affect the consumers' decision making to purchase. Factors such as price, comfort, quality and customer relations have influenced competition in the retail industry. As a result of this, small-scale retailers are declining due to competition with large-scale retailers (Arshad, 2007). Therefore, this study discusses on issues related to competition in the retail sector as a result of changes in the agro-food supply system from the perception of small-scale retailers.

LITERATURE REVIEW

Food supply chain management in Malaysia have experienced significant changes in the system. The implementation of the traditional food marketing system were based respectively on the producers and distribution functions. Production involves various types of intermediaries such as wholesalers, agents and retailers. However, wholesalers are still mastering the supply chain and obtain higher returns than producers and retailers (Arshad, 2008). In addition, a large number of intermediaries have led to the increase of costs and selling prices. Added value aspects are not emphasized since marketing strategy is minimum (Arshad & Shamsudin, 2007). To overcome the problems occur in the traditional marketing system, changes have been made through the introduction of new supply chain system. This chain system basically provide consumer oriented, offering quality products, value-added aspects, wholesaler and retailer consolidation function (Arshad, 2008). Weaknesses in the existing chain have led to an effort to create a chain system that is more consumers oriented. Participants in the market such as manufacturers and wholesalers are encouraged to increase grading, labelling and utilizing high technology in order to increase the value added output (Reardon et. al, 2006). In addition, retailers are encouraged to act as an agent who is capable of offering products to consumers and to break the wholesaler monopoly.

Retailing is a business activity which has been long practiced. This activity is very broad, which involve small business entities to large business entities. Retailers are often associated with the concept of selling goods to end users (Baron et. al, 1991). According to Bellinger et. al. (1976), retailer's activity includes the formation process of selling to the consumers. This was viewed as a primary target by the seller. In addition, this was associated with activities relating to the sale of goods and services to end users such as private, family and more.

The retail market structure in Malaysia had changed considerably. At the initial stage, the sector was dominated by small retailers who carried out business and transaction among the nearest neighbourhood. Malaysian retail landscape begins with traditional grocery stores, mini markets, night markets and wet markets (Wel et al. 2012). Due to urbanization, demand and changes in lifestyle, modern retail sectors gained attention among consumers (Wong, 2007). Shamsudin & Safety (2005), the development of modern retailing began in the early 1990s. Growth in the retail sector continued with the existence of new modern retailers. This can be seen through the increasing numbers of supermarkets in Malaysia (Wong, 2007). Although the number of supermarkets is little compared to the normal retail stores, contributions of the retail sector involve a great value. Arshad (2008), exist a significant strengthening of large retailers such as supermarkets and hypermarkets in Malaysia.

Changes in agro- food chain system aim to develop the retail sector as a whole in enhancing the role of the retailer. However, the inclusion of supermarkets has created competition to small retailers. The advantages of the efficient management system in supermarkets are offering quality items at lower price and easy availability. Reardon & Berdegué (2006) stated that there are three aspects of the competition "downstream" between supermarkets and small retailers such as price, quality, security and comfort. Referred to the model stated by Reardon & Berdegué (2006), it discussed about the relationship between the customers. This study also discusses about the relationship aspects between customers. The relationship aspects between customers have been discussed by Lombart & Louis (2012); Dhalbolkar et. al (2006); Goldman & Hino (2005) and Zinkhan et. al.

Trappey and Lai (1997) stated that, offering a low price is important for consumer who purchase in the supermarket. Minten and Reardon (2010) found that the prices of food in supermarkets in Delhi are cheaper than food available from small retailers due to low cost involvement. This is due to supermarket has the advantages in the acquisition of retail, technology and management of inventory (Reardon et al. 2003). However, the ability of supermarkets to offer low prices is usually not consistent. Conlisk et. al. (1984), the market price of supermarket is practiced cycle concept to attract users to get the goodies. Occasionally small retailers are also able to offer lower prices compared to supermarkets. Fox and Sethuraman (2006) stated that small retailers can save cost because retailers positioned near customers' housing areas involve low operating cost. Higher prices setting in traditional markets will influence consumers to purchase goods from supermarkets (Farhangmeh et al. 2000).

Supermarkets and traditional retailers in developing countries also compete in the aspect of consumer comfort to attract consumers. Consumer comfort refers to time, place of purchase, and the facilities provided to facilitate consumers. Reardon & Berdegué (2006) argues that transaction costs bear by the consumer is a comfort aspect need to be considered while making purchase. Dibb et al. (2005) stated, comfort is not the only factor taken into consideration but also time factor, cost reduction, consumer stress and spending.

In addition, operating hours also influence consumers when considering the place of purchase (Kaufman, 1996). Reardon & Berdegué (2006) stated that the costs bear by the user will determine the consumers' purchase decisions and reflect the consumer comfort. Consumers who buy products through traditional retailers tend to make frequent purchases due to the distance factor. However, purchases from supermarkets occur only at a certain time. Although there are no regular purchases, but consumers tend to purchase higher quantities of goods from supermarkets compared when purchasing at traditional markets (Lusch, 1982).

Product quality or production is an essential feature. Productions of the quality products give satisfaction to consumers after purchasing. According to Reardon & Berdegué (2006), utilizing a system of private standards in the assessment of the goods sold in the supermarkets may provide quality products. While, Phan & Reardon (2006) through the studies in Vietnam, showed that modern retailers such as supermarkets convince consumers by selling the goods through the usage of security procedure. Although there are more consumers who are buying food products and fresh products from modern retailers, but still there are significant purchases in traditional markets due to quality and good service (Goldman et al, 2002). Zinkhan et al. (1999) reported that the majority of respondents chose to purchase fresh products from traditional markets compared to supermarkets due to fresh and the quality of product.

Competition between small retailers and supermarkets also involves the formation of customer loyalty. Abu (2004) stated that personal interaction between retailer and customer can influence customer loyalty. Customers are more likely to choose a place that is able to offer a service that is easy to interact (friendly). There are studies which discussed about customer relationship and loyalty. Lombart & Louis (2012) stated that, retailers' personalities are also able to influence consumers to make purchases and maintain the loyalty. For large retailers such as supermarkets,

consumer satisfaction is important in bonding good relationships. Conversely, traditional retailers are the one who maintain the long term relation among the customers. Moreover, traditional retailers are still concerned about the close relationship with customers. These factors show a good relationship and establish customer loyalty. Chamhuri & Batt (2009) found that, personal relationship between retailers and customers, can establish trust.

METHODOLOGY

This study involves questionnaire as a tool to collect data. Besides being an educational town, Bangi is also known for its business activities (Directory Bandar Baru Bangi, 1998). The study focuses on small-scale retailers in Bangi who involved in retail sales based on agro- food products. This means, this research involves only small-scale food-based retailers. Small retailers in this research are peddlers, hawkers and small-scale retailers.

This study also used a random sampling method through convenience sampling. The sampling method is random sampling which allows all members of the respondent earn the equal opportunity to be selected as the sample (Hussin et. al, 2014). Based on the sampling method, a total number of 163 small retailers have been chosen as respondents for this study. The number of respondent chosen is compatible with the objectives of this study. Past studies was done, involved 150 respondents consisting of retailers (Md Ali et. al, 2009; Mohd Roslin & Melawar, 2008). There were no specific report on the number of small-scale food-based retailers in Bangi, therefore convenience sampling is acceptable. The questionnaire consists of open and close-ended questions.

RESULT

BUSINESS PROFILE

This study was conducted on three types of retailers (Table 2). The majority of respondents are small shop owners, which total of 110 respondents (67.5 %), followed by hawkers, a total of 29 respondents (17.8 %) and the rest is a stallholder who represented a total of 24 respondents (14.7 %). The number of respondents who rented premises is more than 50 % of a total of 95 retailers, whereas 40.5 % of those 66 retailers have their own premises.

More than half of the retailers (83) have business size approximately 1000 square feet which is 50.9 % and only 20 retailers (12.3 %) having business size of more than 2000 square feet. The rest were 60 (36.8 %) where the size of the business is between 1000 to 2000 square feet. Among the categories of traded goods are groceries, food, agricultural products and others. A total of 77 respondents (47.2%) were involved in business groceries and 72 respondents (44.2%) were involved in food businesses. A total of 12 respondents (7.4%) are based on agricultural business.

FACTOR OF COMPETITION

Table 3 shows the results of the factors analysis. Factor 1 with the Eigenvalue of 2.983 include three items where the percentage of variance of 24.9 %. Alpha Cronbach`s value for this factor is 0.794. This factor refers to the relationship between retailers and customers. These factors are the main factors affecting retailers` competition with the mean factor of 4.46. Factor 2 with the Eigenvalue of 1.631 include 4 items such as supermarkets offering low prices, supermarkets offer a promotional price , small retailers selling prices according to the market and the price of fresh goods in supermarkets are reasonable. Alpha Cronbach`s value for this factor is 0.655. This is the second main factor affecting retailers. Mean factor is 4.09.

The third factor has three items with the Eigenvalue of 1.606. Variance percent values for this factor was 13.4 %. Alpha Cronbach`s value is 0.599. This factor is the least important factor affecting competition for retailers with the mean of 3.95. The fourth factor refers to customer comfort. These factors have the Eigenvalue of 1.134 with the percent variance of 9.45 %. This is third factor that most influence competition for retailers that has a mean value of 4.00.

Table 2: Business Profile

Sample no, n = 163		No. of responden	Percentage (%)
Retail business type	Stall	29	17.8
	Retail	24	14.7
	Small shop	110	67.5
Premises	Private	66	40.5
	Rent	95	58.3
	Others	2	1.2
Business size	Below 1000 square feet	83	50.9
	1000-2000 square feet	60	36.8
	Above 200 square feet	20	12.3
Types of business	Retail foods	77	47.2
	Food	72	44.2
	Agriculture product	12	7.4
	Lain-lain	2	1.2
Year of business	5 years below	106	65.0
	6-10 years	42	25.8
	11-15 years	13	8.0
	16-20 years	1	0.6
	21 years above	1	0.6
Monthly income (RM)	RM 5000 below	120	32.5
	RM 5001 - RM10000	15	40.5
	RM 10001 - RM 15000	14	17.2
	RM 15001 - RM 20000	11	7.4
	RM 20000 above	3	2.5
Number of employee	Less than 2 person	102	62.6
	3-4 person	41	25.2
	5-6 person	18	11.0
	7-8 person	1	0.6
	More than 9 person	1	0.6
Distance of the premises from the supermarket	Less than 2 km	73	44.8
	3-4 km	23	14.1
	5-6 km	28	17.2
	7-8	21	12.9
	More than 9 km	18	11.0
Permanent customer	Workers	28	17.2
	Students	30	18.4
	Neighbourhood	105	64.4
Main competitors	Supermarket	80	49.1
	Local retailers	51	31.3
	Stall	18	11.0
	No competitors	14	8.6
Do supermarket caused competition ?	Yes	137	84.0
	No	26	16.0

Table 3: Factor Analysis

Constructs	Factor			
	1	2	3	4
Relationship between retailers and customers	0.835			
Supermarkets prioritize customer feedback	0.823			
Supermarkets have a variety of strategies and strengthen relationships with customers	0.794			
Supermarket offers low price		0.810		
Supermarket offers promotion price		0.691		
Small retailers selling prices according to the market		0.658		
Prices of goods fresh in supermarkets are affordable		0.579		
Retailers practicing good storage system to ensure product safety			0.773	
Small retailers use product certification			0.737	
Stocking fresh product always sufficient in small retailers			0.671	
Small size retail outlets easier for users to find items				0.793
Easier for consumers to get the product in accordance based on current quantities with small retailers				0.758
<i>Eigenvalue</i>	2.983	1.631	1.606	1.134
<i>Percent variance</i>	24.858	13.595	13.387	9.452
<i>Cumulative variance</i>	24.858	38.453	51.840	61.292
<i>Cronbach`s alpha</i>	0.794	0.655	0.599	0.434
<i>Factor mean</i>	4.46	4.09	3.95	4.00

CONCLUSION

Factor analysis indicated four factors which influence competition among retailers – price, comfort, quality assurance and food safety, and the relationship between retailer and customers. Results from the factor analysis showed that the relationship between retailers and customers gave the highest mean. This shows that these factors are the main aspect of the competition. This finding shows that consumers purchased goods sold by small-scale retailers due to the trust that they have with these retailers. In addition, factor analysis also showed that quality assurance and safety of the product gave the lowest mean value. It reflects that quality and safe product does not influence competition among retailers. This finding is consistent with Zikhan (1999) whom indicated that consumers purchased goods that are sold by small-scale retailers due to the trust that they have with these retailers. In addition, 84% of retailers in this study agreed that the existence of a supermarket affect competition to them.

Based on the research conducted, it was found that the involvement of supermarkets in the retail sector has an impact on the competition aspects to small retailers. Small-scale retailers have experienced great pressure from competition with modern retailers. Supermarkets operate in larger –scales have the tendencies in dominating the retail industry. Policy implications and recommendations need to be implemented in order to rectify this issue. Transformasi Kedai Runcit (TUKAR) that has been implemented since 2011 should be utilized by retailers through their involvement. Modernization of small retailers had increased sales up to 30 percent, as demonstrated in previous pilot studies (Economics Transformation Program, 2010). The increase in sales indicated that customers wanted a comfortable, modern, bright and clean environment, similar to large format stores. The main purpose of TUKAR is to protect the welfare of the retailers and to remain competitive in the retail sector.

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