How Fresh? -
A Working Woman's Perspective of Vegetable Vending

*** NEELA GOLLAPUDI - ** V. JAYASHREE**

Abstract

The changing retail scene in India with the emergence of retail formats like supermarkets and hypermarkets especially in the urban areas are revolutionizing the shopping preferences and habits of the urban consumers. The youth and the working women are the major driving forces in this revolution. Malls are favourite "hang out" place for the youth whereas the urban working woman, who is hard pressed for time is looking at conveniences in shopping for the family. This paper proposes to compare the impact of supermarket vegetable vending with the traditional neighborhood green grocer. Complementary products such as fruits and flowers would also be considered as being part of vegetable vending. The paper is limiting itself to vegetable vending alone because of its impact on a family's health and vegetable buying is low cost but a high involvement purchase.

(R)evolution of Retail in India

Retail is the new buzzword in India. The humble store owners are today the focus of attention. Many believe that retail is a recent phenomenon in India but they are very badly mistaken. While barter can be considered the oldest form of retail trade, since independence, India with all its complexities has evolved to support the unique needs of the country. The inception of the retail industry dates back to times where retail stores were found in the village fairs, *Melas* or in the weekly markets. These stores were highly unorganized. These *Haats, Mandis* and *Melas* still continue to be part of our landscape and form an essential part of life and trade in various areas. The Public Distribution System (PDS) which has its origin in the 'rationing' system introduced by the British during World War II would emerge as the single largest retail chain existing in India. The Canteen Stores Department (CSD) and the post offices in India are also among the largest network of outlets in the country reaching populations across the state boundaries. The co-operative movements also championed the setting up of various stores across the country post independence. Khadi stores were also setup.

In the past decade, the Indian marketplace has transformed very dramatically. However, from the 1950s to

* Associate Professor_,Department of Business ManagementKasturba Gandhi College for Women Marredpally, Secunderabad- 500026, neela_gollapudi@yahoo.co.in

** Assistant Professor, Vignana Jyothi Institute of Management Marredpally, Secunderabad-50026 , jaya1060@yahoo.co.in

the 1980s, investments in various industries were limited due to low purchasing power in the hands of the consumer and the government's policies favoring small scale sector. Initial steps towards liberalization were taken in the period from 1985-1990. It was at this time that many restrictions on private companies were lifted and in the 1990s, the Indian economy slowly progressed from being state-led to becoming "market-friendly". The maturity of the retail sector took place with the establishment of retail stores in the locality for convenience. The first attempts in organized retailing were noticed in the textile sector. Some of the popular ones were the Raymond's, Vimal Showrooms, garden Vareli Showrooms etc. With the success of the branded menswear stores, the new age departmental stores arrived in India in the early nineties. This was the beginning of a new era for retail in India. Post liberalization, the economy opened up and a new large middle class with spending power had emerged. This helped to shape the retail sector. The vast middle class demanded value for money in its products. The emergence of the Indian housewife, who managed her home and work, led to a demand for more products, a better shopping environment, more convenience and one stop shopping. The retail industry in India gathered a new dimension with the setting up of the different International Brand Outlets, Hyper or Super markets, shopping malls and departmental stores.

The retail scenario in India is unique. It can be widely split into the organized and the unorganized sector. India has topped the AT Kearney's annual Global Retail Development Index (GRDI) for the third consecutive year, maintaining its position as the most attractive market for retail investment.

The Indian retail market — one of India's fastest growing industries — is expected to grow from US$ 350 billion to US$ 427 billion by 2010. According to Euromonitor International, the Indian Retail market will grow in value terms by a total of 39.6 per cent between 2006 and 2011, averaging growth of almost 7 per cent a year.

Modern retail accounts for about 4 per cent of the total retail market in India. This share is expected to increase to about 15 -20 per cent with the entry of a number of corporates into the segment. Modern retail formats have grown by 25-30 per cent in India in the last year and could be worth US$ 175-200 billion by 2016.

Retailers in India are the most aggressive in Asia in expanding their businesses, thus creating a huge demand for real estate. Their preferred means of expansion is to increase the number of outlets in a city, and also expand to other regions, revealed the Jones Lang LaSalle third annual Retailer Sentiment Survey-Asia.

Driven by changing lifestyles, strong income growth and favorable demographic patterns, Indian retail is expanding at a rapid pace. The country may have 600 new shopping centres by 2010. Mall space, from a meagre one million square feet in 2002, is expected to touch 40 million square feet by end-2007 and an estimated 60 million square feet by end-2008.

Food dominates the shopping basket in India. The US$ 6.1 billion Indian foods industry, which forms 44 per cent of the entire FMCG sales, is growing at 9 per cent and has set the growth agenda for modern trade formats. The prospect for growth of the branded segment is huge, as nearly 60 per cent of the average Indian grocery basket still comprises non-branded items.

Of the 12 million retail outlets (which is the largest in the world), over 5 million sell food and related products. Some of the large players in this market are Kishore Biyani's Food Bazaar, Mukesh Ambani's Reliance Fresh, Godrej Agrovet, the Aditya Birla Group, and the Tata Group (which acquired 70 per cent stake in Innovative Foods from the Amalgam Group) among others.

The Indian retailing sector is at an inflexion point where the growth of organized retail and growth in the consumption by Indians is going to adopt a higher growth trajectory. The Indian population is witnessing a significant change in its demographics. 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 going to be the key growth drivers of the organized retail sector.

Initially, this was about Indian corporate houses rolling out malls and supermarkets, but with Wal-Mart coming into the Indian market, the era of the superstore is dawning. Unlike the kirana stores that served us for decades, this new breed of retail chains is heavily dependent on IT.

The biggest competitor for Bharti-Wal-Mart is likely to be Reliance Retail, the retail wing of Reliance, which had planned to establish 10,000 stores by 2010. It had already opened 11 pilot stores under the "Reliance Fresh" format in Hyderabad.

Key Drivers of Retail Change in India

The local *bania* has gradually transformed into a small supermarket. This transformation is not restricted to metro cities but has rapidly spread to smaller cities and towns. The people driving this change are the Indian consumer. Some of these key drivers are:

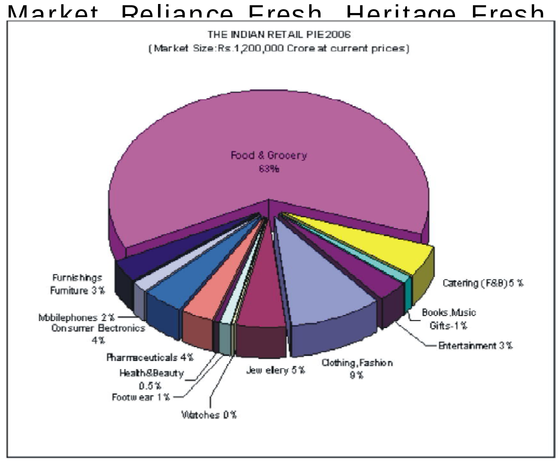
Changing Income Profiles: The income classification done by the NCAER shows that a steady economic growth fuelled the increase in disposable income in India. The average middle-class family's disposable income rose by more than 20% between 1999 and 2003. According to the NCAER data, the middle income and the upper-middle income categories are likely to witness the most significant expansion in the coming decade. The upper and middle class are likely to increase their share in the population from 19% in 1995-96 to 42.6% in 2009-10, a substantial increase, while the middle-income category is likely to witness an increase from 32.9% to 39.8% in the same period. The building up of the middle class and the higher income echelons will provide a demand for the niche and branded products.

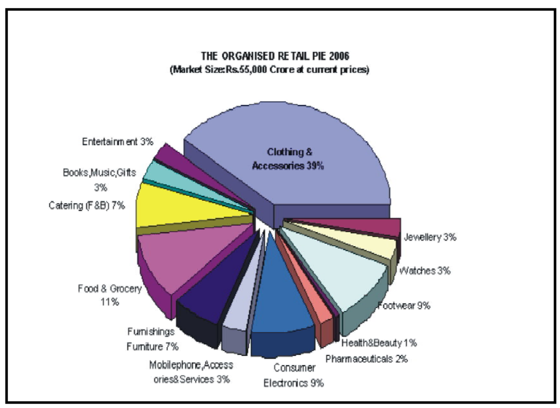
Changes in Consumption Patterns: The change in income has brought about changes in the aspirations and the spending patterns of the consumers. The buying basket of the consumer has changed. Penetration of credit cards is also on the increase in India.

Growth of young earning Indians: Nearly 70% of the Indian population is below the age of 34. These youngsters are redefining the service and consumption patterns. They are expected to spend close to a lakh crore in a year. Television and media have helped these young consumers to stay tune with the surroundings and make the world a small place to live in. the new face of emerging India is that they are value conscious, fashion driven, time savers and shopaholics.

Food and Food Services

The food and grocery market in India is estimated to be at Rs. 615,000 crores. The organized food and grocery sector constitutes only 11% of the total market. The food and groceries sector can be divided into fresh groceries, branded packaged foods, personal hygiene products, toiletries and dry unprocessed groceries. In case of fresh food groceries, the Indian consumer prefers buying fresh vegetables, fruits milk and meat. There are now many options for the consumer, the local market or from the street side vendor or from mobile vegetables vendor or of course from organized outlets. Key players in the food and grocery market in Hyderabad include Food World, Food Bazaar, Subhiksha, Trinethra Super Market, Reliance Fresh, Heritage Fresh,





Nutritive Value

Fresh vegetables provide a variety of vitamins and minerals, they are low in fat, and they provide fiber. USDA nutritionists recommend 3 to 5 servings from the vegetable group each day. Count as a serving 1 cup raw leafy vegetables, l/2 cup of other vegetables that are cooked or chopped raw, or 3/4 cup of vegetable juice. Go easy on the fat and salt added during cooking or at the table in the form of spreads, sauces, dressings, toppings, and seasonings.

There are no set rules for buying vegetables because they all have individual characteristics and values. Experience in personal selection is the best teacher

Vitamins

It has not been proven that vitamins can prevent cancer. The current theory is that every day free radicals attack healthy cells. When these healthy cells are weakened, they are more susceptible to cardiovascular disease and certain types of cancers. Antioxidants, such as vitamins C and E, and carotenoids, which include beta-carotene, lycopene, and lutein, help protect healthy cells from damage caused by free radicals. More studies need to be done, but the most promising vitamins are called antioxidants. Antioxidant vitamins are Vitamin C, E and beta carotene and are found mostly in fruits and vegetables.

Even though we don't know if the vitamins themselves provide the most protection against cancer, we do know that eating fruits and vegetables are good for us. It is recommended that we eat 2-3 servings of fruits and 3-5 servings of vegetables each day. The added benefit to our health when we eat fruits and vegetables is that we are eating less fat in our diet and this helps us to maintain a healthy body weight. Both also provide protection from cancer. The indiscriminate use of pesticides to terminate the life of the target pests has contaminated all quarters of the environment affecting the health of humans and animals. This is sometimes due to the persistent, bio-accumulative and bio-magnifying nature of certain pesticides known as POPs. At heightened, biomagnified concentrations, these insect and plant poisons become potent human toxins.

Man-made toxins find there way surreptitiously into our food. A recent Toxics Link study showed that there are unacceptable levels of chemical contamination on vegetables due to deposition from air and groundwater sources.

Women in our country may have the greatest impact on our nation's health. They are usually the family caregivers and the ones who plan and prepare all of the meals and foods eaten by a family. A woman's influence on health and the family eating habits will not only impact her, but also her family and future generations.

Research Methodology

Hypothesis:

H1: Patronization of supermarkets is based on convenience for purchase of vegetables

H2: People who patronize supermarkets equate price and quality

H3: People who patronize supermarkets are multi-taskers

H4: People who patronize supermarkets are prestige conscious

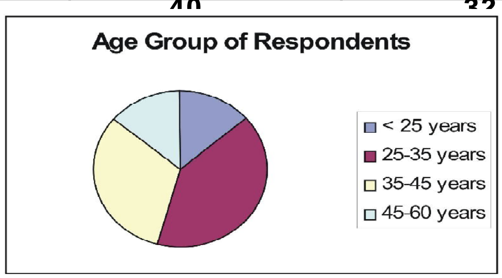
The present exploratory study on purchase of vegetables from supermarkets has been carried out in the twin cities of Hyderabad and Secunderabad, with a sample size of 100. Five prominent retail outlets carrying vegetables were selected and a survey was conducted among the patrons of these stores after they made their purchases. The survey was conducted in middle class localities. The respondents were selected according to convenience and a questionnaire was administered to them through a personal interview. The survey was conducted on weekends and also week days. The interview schedule consisted of 25 questions relating to the demographics, purchase behavior, ability to multitask, price-quality schema and prestige sensitivity. A five-point Likert scale (Strongly Disagree to Strongly Agree) was used to analyze the responses. Based on the responses, a profile analysis of each item was carried out.

Limitations of the study

1. The sample size of 100 can only give a 'birds eye view' of the perceptions of women, and hence in no way conclusive.
2. The selection of the sample based on convenience is a major limiting factor of this study , because it might not be truly representative
3. The present study did not compare between road – side, push cart and other kinds of vegetable vending with that of super markets.
4. The time and place of data collection, immediately after the purchase could lead to a positive bias by the respondents.

Data Analysis

Age:				
Age	< 25 years	25-35 years	35-45 years	45-60 years
No. of	14	40	32	14



Respondents

Findings : Majority of the shoppers fall in the age group of 25 to 45 years. 62% of them were working women, 38% being homemakers.

Frequency of Purchase

Frequency of Purchase	Once a week	Once in ten days	Once in two weeks	Any other
No. of Respondents	60	10	8	22

Findings : The frequency of purchase of vegetables happens to be weekly (preferring to buy in weekends) and to a lesser extent daily. This indicates that though it is important for vegetables to be fresh, the working woman is making a compromise with respect to frequency of purchase.

Income per Month

Income Per Month	< Rs. 10,000/-	Rs. 10,000 to Rs. 20,000	Rs. 20,000 to Rs. 30,000	>Rs.30,000
No. of Respondents	18	24	46	12

Findings : Majority of the respondents polled fell in the total monthly income group between Rs.10,000/- to Rs.30,000/-.

Family Size

Findings : On an average, the size of the family is around four members

Education

Findings : Most of the women are well educated.

Mode of Payment

Findings : Most of the respondents feel that mode of payment is not an important factor in purchase of vegetables at supermarkets.

Variety of Vegetables

Findings : Majority of the respondents feel that more variety of vegetables is offered in supermarkets. They also believe that there is flexibility in respect to the quantity of purchase to be made.

Convenience of timings

Findings : A majority of them believe that the store timings are convenient. Heritage Fresh and Trinethra open stores at 7a.m. and are open up to 10 p.m.

Section-wise display and Self-service

Findings : There is ease of purchase at super markets because of section-wise display and self-service .

Convenience of pre-packaging

Findings : Because of the prepackaging of vegetables, most of the women find it very convenient to shop at supermarkets and it lessens their work to store.

Trust

Findings : 86% of the respondents trust the measure of vegetables in the market.

Multi-tasking ability

Findings : Majority of the respondents are not multi-taskers and hence look for conveniences and shop at supermarkets or places where such conveniences are provided.

Price-Quality Schema

Findings : 66% of the respondents agree that price determines quality. The higher the price, the higher the quality. Thereis a positive perception abouthigh price and better quality. The survey bears this out.

Prestige Sensitivity

Findings : The survey points out definitely that shopping at supermarkets is not related to prestige. Women do not find it prestigious to shop at supermarkets. The reason they shop at supermarkets is the convenience offered.

Conclusions

Vegetables are available from your local supermarket, but freshness there may be more hype than reality. All supermarkets buy vegetables when slightly under ripe and shipped to warehouses where they are treated with gases as a preservative and stored in environments where temperatures and humidly levels are tightly controlled.

Vegetables purchased at the roadside stands are the best. Nothing beats the flavor of a freshly picked vegetable. Try a comparison test of store-bought tomatoes versus those from a roadside stand to know the facts. The flavors simply do not compare. In fact, all vegetables taste better when fresh and have higher nutrient values. The longer something sits on a shelf or in a refrigerator, the less nutritional value it offers.

The high proportion of patronage of super-markets to buy vegetables is due to a majority of the women going out to work. The survey clearly establishes that many women are not adept at multi-tasking, which requires them to be ambidextrous. So being, the working person is more easily attracted to conveniences. Super markets with their convenient store-timings, layouts, week-end shopping and retailing of other complementary products, thus become an attractive destinations to today's urban woman , hard pressed for time and leisure, be it a house-wife or a working woman.

One can safely conclude that woman's preference for pre-packed vegetables, the flexibility of purchase in addition to 'clean' vegetables is another reason for patronage of vegetables at the super-market, as it reduces the tedium and time of cleaning, sorting and storing.

The changing life style choices and consequently the food habits of today's consumer could be another reason for the extreme patronage of super markets. Today's educated woman seems to be sacrificing freshness of veggies to that of convenience. The choices that she makes today are going to have a long-term impact on her and her family's health.

By eliminating poor lifestyle choices, nourishing our bodies with healthy foods, and replenishing items that we may be lacking, we can truly enjoy all that family life has to offer! With the right frame of mind and an approach to nutrition that includes the entire family, everyone can experience better quality of life, and avoid the consequences of ill health that frequently result from making poor dietary choices.

Currently there is no mechanism to ensure safe food to the consumer. The study therefore believes that there is an urgent need to educate the consumer about how to select fresh veggies. Improving the services of the roadside vendors, 'Rythu-Bazaars' etc., would be a better way out for a healthy family nay a healthy society.

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