Concentration in the Hungarian Food Retailing and the Supplier-Retailer Relationships in the Fruit and Vegetable Sector

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Abstract

By the concentration of food trade the relationship of the producers and traders has also changed since the supply of even larger volumes of homogeneous products are required. This is especially a problem in the case of agricultural raw material production since as agricultural production is rather scattered. Food industry is much more concentrated than agricultural production; this means that production for processing has also to adapt to the demand.

In our paper, we provide a general overview on the development of food retailing and on the extent of concentration. We present the relationship of the producer and trader on the example of the fruit and vegetable sector, provide an international overview and present the Hungarian situation too. We make use of the international and Hungarian special literature. Because of the topic of our research we had concentrated more on the Hungarian literature. We also perform concentration calculations based on statistical data. In addition the personal interviews with the food chains are also included in connection with the requirements set for the suppliers and the conditions of meeting these requirements.

Based on our investigations an important conclusion is that the supply requirements are not always real (regarding the background conditions) and retailers obviously make use of their better bargaining position – especially in the fruit and vegetable sector, which is of a rather scattered structure – but they have to adopt to the supply requirements also in the future. The small suppliers should form organisations for marketing or should join the large suppliers; besides, they should increase their knowledge and innovation skills; and should switch from a production approach to a market approach.

JEL classification: D3, L81

Keywords: food retailing, concentration, supplier-retailer relationships

1. Introduction

In Hungary since the political and economic transition (the beginning of the ninetieth) a rapid change has taken place in food retailing and it became similar to structure of the developed countries, which had already been prevailing for decades. The international food chains appeared in Hungary and at the same time or slightly later the chains in Hungarian property have also been established. Parallel to this the relationship of the producer-retailer has changed radically and we can say that this has „shocked" the producers as they had much less time for adaptation than in the countries of similar traditions. Following the accession to the European Union the food import increased and this obviously manifested itself in the food stores, however, the international food chains are not fully „responsible" for the import, since there are also other import channels. As a consequence of the above the producers feel that they are captured, however it is all about competition, the traders are not to blame for the disadvantages.

In addition to the general presentation of food retailing, and concentration analysis the paper provides an overview of a sector, that is, the situation of the fruit and vegetable sector with special regard to the sale and attempts to present the ways of a better adaptation. The main methodology of the research was studying the international and Hungarian special literature, statistical analyses, and concentration calculations as well as summarizing the experience gained from the interviews with the food chains.

2. Literature review

Situation of food retailing after the millenary

In Hungary the process of retail concentration started at the end of the ninetieth and since the millenary it has speeded up (Juhász et al., 2005; Európa Fórum Alapítvány, 2007). The characteristics of this period are the following:

- Expansion of multinational chains;
- Shift in the proportion of the retail formats;
- Transformation of the retail store-structure;
- The consumers' supply has become bipolar (there is a sharp contrast between the capital/big cities/smaller towns and villages in terms of number of shops, facilities of food outlets and price levels).

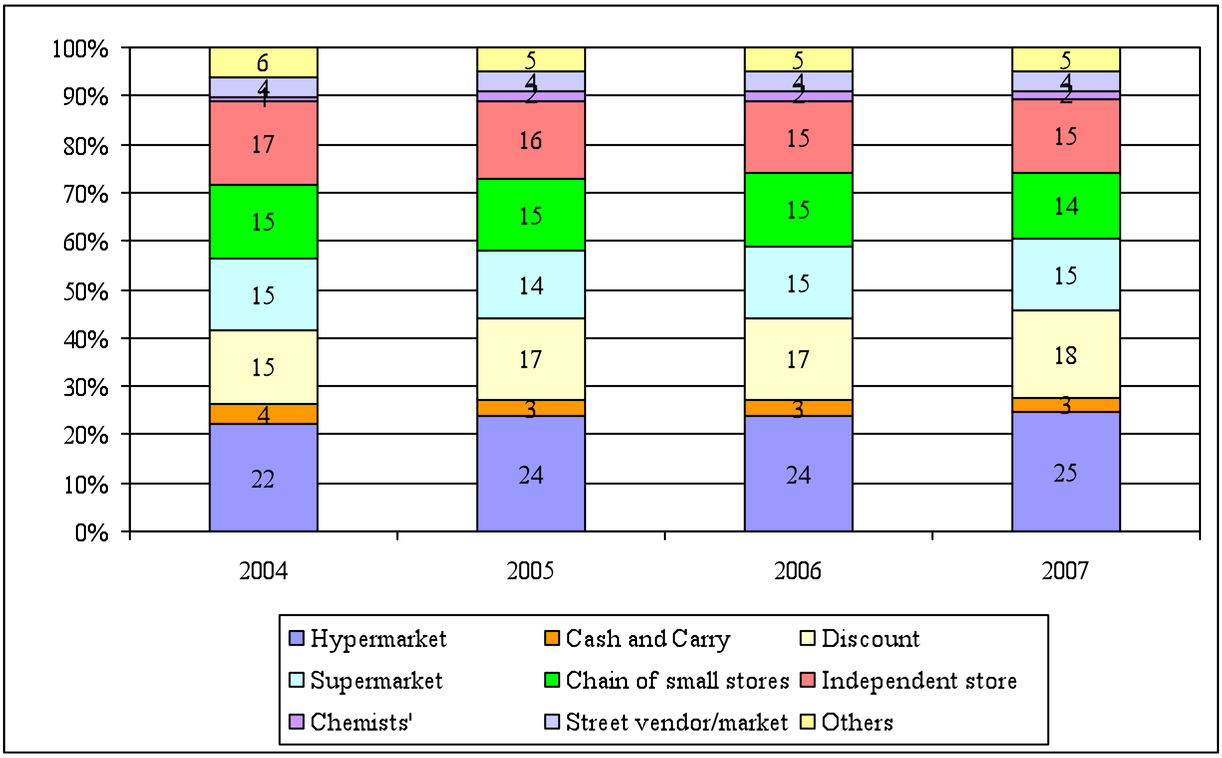
The sales of non-specialized and specialized food retailing have more than doubled in the seven years between 2007 and 2000. During the same period the total sales of retailing increased by a smaller extent, that is, by 80.4%.

In the period analysed significant restructuration of the sales channel could not be seen; there was no significant change regarding any of the channels between 2004-2007 (Figure 1). This shows that the market is saturated, in fact the available means/trade marketing have no impact on the consumers. Regarding the 2000 data (hypermarkets 14%, supermarkets 15%, discounts 16%, Cash and Carry 6%, chain of small stores 5%, independent stores 29%) the expansion of the hypermarket category is remarkable. At the same time the increasing share of the chains of small stores and the decrease of the independent small shops are also important.

Figure 1

Development of the sales channels, 2004-2007

(%)



Source: GfK Hungária, Commercial analyses 2007

In spite of the concentration of the Hungarian food retailing the share of other small stores is still large at present. This can be explained by the fact that food retailing is bipolar; there is a striking difference between the food retailing structure in the capital/large towns/settlements and the villages; therefore, the food chains aim to access the markets of the large settlements. This holds true even if the foreign food chains having accessed the market most recently (Lidl, ALDI) target rather the small settlements, that is, settlements with a population of a few thousands.

Concentration of retailing

The book of Schenk – Tenbrink – Zündorf (1984) presents in detail the retail concentration. The concentration is based on the complex and joint effect of economic factors, within the enterprise among the enterprises as well as outside of the enterprises. There are 3 groups of factors that play a role in the evolution, growth and decrease of concentration; there are the various **segments of concentration**:

- segment I (extern development),
- segment II (intern development),
- segment III (segregation of the enterprise).

According to Schenk (1991, and personal interview) concentration is an organic part of the market economy. The problems encountered in measuring retail concentration are the following:

Problems with the definition:

- what kind of retailing (e.g., "retailing of consumers' goods", "food retailing" → mixed wholesale and retailing);
- what kind of concentration;
- business-based enterprise concentration (merge only, or shares) or total enterprise concentration (demonstration of uneven distribution);
- state or process of concentration.

General problems due to the applicability of the data

- bordering in terms of object, region and time (requirement of homogeneity, relevant markets);
- selection of the concentration characteristics (sale, number of employees, capital, surface, etc.) and the bearers of the characteristics (based on the VAT statistics or on the commercial census);
- selection of the proper concentration measurement.

Special problems with the applicability of the data:

- in the concentration ratio the values of dates and periods;

- statistical classification of the retailing (institutional) enterprises according to the value creation centre, analogously: functional commerce cannot be interpreted.
- Problems in the regional comparison:
    1. countries of various sizes and population, various retailing structures and partly various forms of businesses. Kesko in Finland → 26.4% “market share”;
    2. various “market shares” Wal Mart 106,1 billion USD sale in the USA- 5,5%, “world market share” → 1,42%; Metro 60,9 billion USD sale → in Germany 7,5%, “world market share” → 0,82%;
    3. various strategies by countries and businesses.
- Problems in the comparison by time:
    1. upward/downward processes in the size categories;
    2. vertical concentration is not recognized (“hidden concentration”) in the cases of minority shares, formation of franchise systems and purchasing cooperation (in fact the number of decision centres is smaller than the number of enterprises in the statistics);
    3. sale statements, as a minimal value (not price adjusted).

Problems of interpreting the results:

- the other enterprises cannot be identified in the absolute concentration ratios;
- the absolute number of enterprises cannot be identified in the relative concentration ratios;
- concentration decrease or increase cannot optically be identified in the Lorenz curves crossing each other;
- “invisible” concentration in the cases of several enterprises, which have similar sales (narrow oligopolies);
- based on the concentration no conclusion can be drawn for the competition.

3. Research method

In our paper we used three main methods for introduction the characteristics of Hungarian food retail sector and the possibilities of fruit and vegetable producers as suppliers. First we have analysed the concentration of Hungarian retail sector by cross tables and calculation of Lorenz curve. We have the experience that concentration data available in the trade literature and the press serve principally for guidance only, because the data are not entirely comparable, due to the different basis data and to the mixed profile of the products marketed by the companies ranked under food retail trade.

In the second part of our research we have drawn up the typical sales channels of fruit and vegetables in Hungary using the available statistical data and experience of experts working in the related sector. Here we have used the information gathered during the personal interviews and also the opinion of special experts researching the Hungarian fruit and vegetable sector.

In last we have carried out in-depth interviews with purchasers of large retail chains and salespersons of PO-s (TÉSZ) in order to learn the methods of fruit and vegetable purchasing and gather their opinion about the small scale suppliers, about their weaknesses and strengths, in order to draw up a possible future for small-scale suppliers. We think that in case of qualitative research where we are interested in the "how" and "why" the personal, in-depth interviews are the best solution.

As we wanted to summarise the opinion of as much retailer chain as it was possible, we have used the interviews of three different research periods.

First we carried out interviews by phone with retailers in 2006 about the reasons of growing food import in Hungary. In 2008 we also conducted personal in-depth interviews in order to learn the problems of the Hungarian food sector and during this we gathered the opinion of the retailers about the agricultural and food industrial suppliers. In 2009 and 2010 we continued the research about different partnership aspects between the agricultural or food industrial suppliers and the food retail sector. During this research we visited Pos, fruit and vegetable processor firms and also retailers.

During these researches we could interview almost all the retailers working in Hungary except ALDI. We also visited two fruit and vegetable producer PO-s, six fruit and vegetable processors (three small or medium scale firms, three large firms).

4. Discussion

4.1. Concentration in the Hungarian food retailing

Based on the most recent data available of the Hungarian Central Statistical Office (KSH) the concentration ratios are shown in Table 1.

Table 1

Shares of sales revenue of the enterprises with the largest sales revenues

2006, %

Type of retail	**Item**	**5**	**10**	**20**	**50**
		Shares of sales revenue of the enterprises with the largest sales revenues			
Retailing	99834	20	26	31	36
Non-specialized food retailing	16946	48	60	65	70
Retailing of food, beverages and tobacco (specialized food retailing)	7220	13	16	21	28

Source: Hungarian Central Statistical Office (HCSO)

In the following table the data of the enterprises are categorized by the number of employees.

Table 2

Non-specialized food retailing

Operating enterprises, 2006

Number of employees	**Enterprises**	**Net sales revenue**
	distribution, %	
0	0.77	0.01
1-4	84.37	9.89

5-9	9.15	4.70
10-19	3.38	4.35
20-49	1.32	4.27
50-99	0.51	3.96
100-199	0.27	3.90
200-249	0.06	1.76
250-299	0.01	-
300-499	0.05	1.93
500-999	0.05	5.16
>1000	0.06	59.67
Total	100.00	99.61

Source: Hungarian Central Statistical Office (HCSO)

Remark: In accordance with the rules of the statistical law no data are published if the data is available but the number of data supplying enterprises is less than three.

In the category of more than 1000 employees the share of small stores selling food products was 0.06% within the total number of enterprises, however, they accounted for 59.67% of the total net sales revenue. The micro-enterprises (0-9 employees) accounted for 94.29% of the total number of enterprises but regarding the sales revenue they accounted for only 14.60%. As for small enterprises (0-49 employees) this share was 98.99, that is, 23.22%. The share of medium size enterprises was 0.84% in the number of the enterprises and regarding the sales revenue it was 9.62%. The large enterprises accounted for 0.17% of the total number of enterprises but as for the sales revenue they accounted for 66.76% (Table 3).

Table 3

Retailing of food, beverages, tobacco (specialized food retailing)

Operating enterprises, 2006

Number of employees	**Enterprises**	**Net sales revenue**
	distribution, %	
0	0.87	0.05
1-4	88.81	43.01

5-9	7.62	21.03
10-19	1.90	11.88
20-49	0.62	8.00
50-99	0.15	10.37
100-199	0.01	-
200-249	0.01	-
Total	100.00	94.34

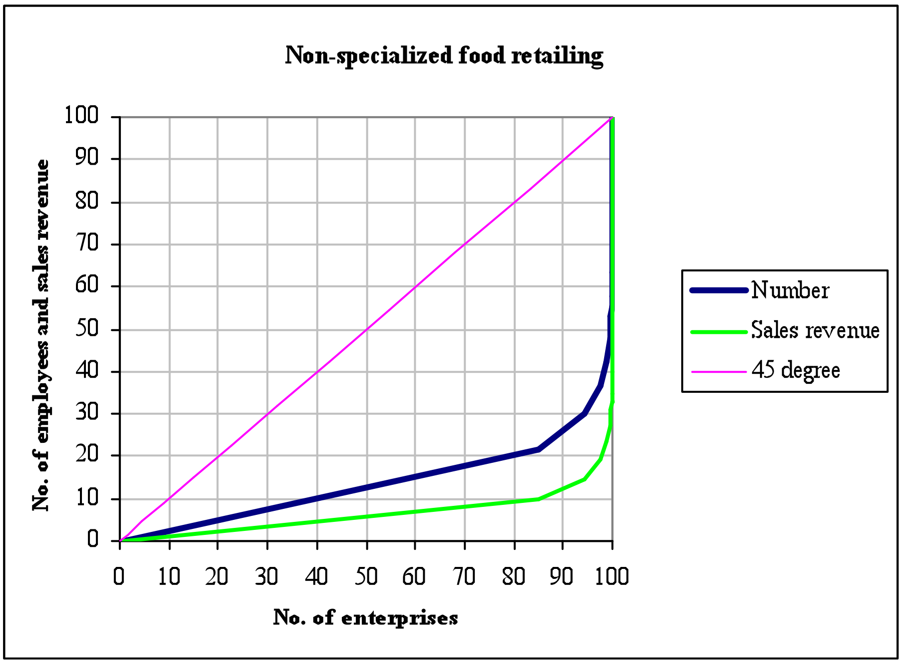
Source: Hungarian Central Statistical Office (HCSO)

Remark: In accordance with the rules of the statistical law no data are published if the data is available but the number of data supplying enterprises is less than three.

The micro-enterprises accounted for 97.30% of the total number of enterprises but regarding the sales revenue they accounted for only 64.09%. As for small enterprises the share of the total number of enterprises was 99.82% as for sales revenue it was 83.97%. Large enterprises are not characteristic in this sector.

In the following two figures the Lorenz curve shows the concentration of food retailing.

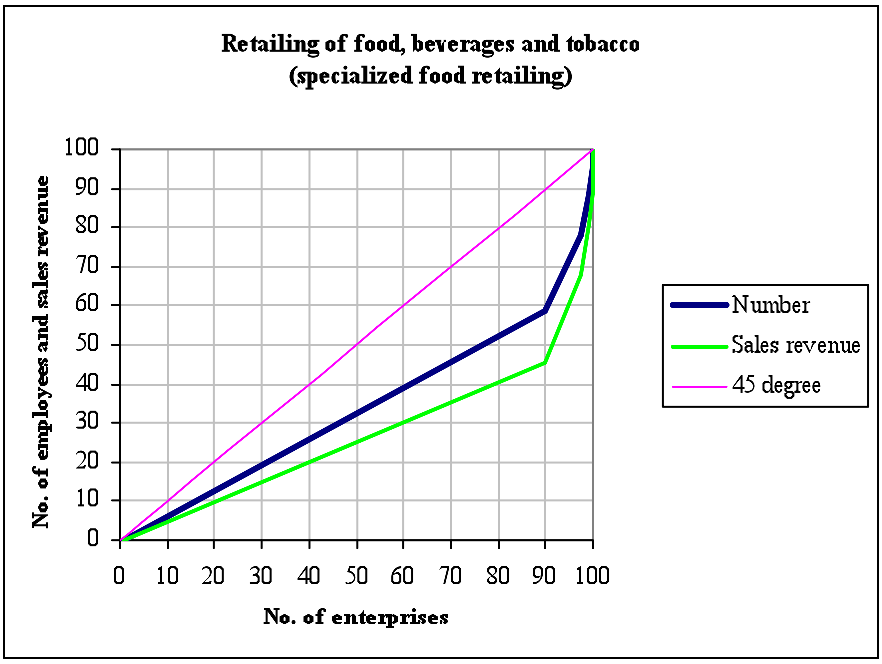
Figure 2



Source: Own calculation based on the data of the Hungarian Central Statistical Office (HCSO)

Similar to the concentration table in Figure 3 it can also be seen that the concentration of non-specialized food retailing is much higher than those of the specialized food retailing.

Figure 3



Source: Own calculation based on the data of the Hungarian Central Statistical Office (HCSO)

4.2. Fruit and vegetable trade – international and Hungarian situation

Fruit and vegetable products are special products; compared to other products they have extraordinary characteristics.

1) They are perishables and after a long time of storage it is difficult to sell them. Owing to these characteristics the proper logistical background is very important (refrigerating lorries, pre-cooling after harvesting, etc.).

2) They are undifferentiated products, which can only hardly be distinguished from other similar products, however there are initiatives to solve the problem by introducing brand names.

3) Seasonality: At present the consumers require these products throughout the whole year and this leads to the increase of the import. In numerous cases this is the cheaper solution since the Hungarian consumers are really price sensitive.

4) The large plantation costs, the long period until production these are the reasons why product innovation and the response given to new customers' demand takes longer.

5) The volume of the yield cannot be estimated in advance, the environmental conditions have having a large effect on the yields cannot be influenced by the producer (weather conditions), these all constitute an uncertainty for both the suppliers and the consumers and require a large flexibility.

In general from the conditions of supplying to retailing four are emphasized:

The product should be supplied1) in acceptable volume, 2) in acceptable quality, 3) in acceptable time and at 4) acceptable price.

1) Volume

The fruit and vegetable purchase of the food chains is often centralized, in general only large volumes can be supplied to them (mainly of brand „A") since the retail enterprises do not want to pay additional costs for dealing with several producers. The only solution is the formation of producers' organisations (POs) and integration of the producers. In the cases of some niche market products individual producers can also supply but this is only possible in the case of some products.

2) Quality

The obvious characteristics of the products which can be tested without their consumption are colour, aroma, withering, various damage, spots etc., but there are other characteristics which are more and more important such as nutrition value, pureness of pesticides, originating from organic production, etc.

In addition, there are services, which improve the “quality” of the product, such as packaging or pre processing (washing, skinning, slicing). One part of these procedures is carried out during the post harvest treatment but the others are actually food industrial procedures. In Hungary the procedures of post harvest are not satisfactory and this often makes the market access difficult and deteriorates the quality.

For certifying and assuring the quality of the product there are various rules, standards, and certifications in the forms of international, enterprise, or civil initiatives. Numerous commercial chains set their own requirements to the suppliers. Such standards are for example, BRC, EUREPGAP, or Filière Qualité Carrefour by the help of which the commercial chains are able to assure high quality and security. Most recently other aspects have also appeared, such as the sustainable agricultural production, organic products, social aspects, environment protection, phyto-sanitary requirements, etc.

3) Time

The products have to be delivered in accordance with the requirements of the chain. This is only possible with proper skills (proper lists of species, special skills in production technologies) and high level logistics. The producers’ organisations (POs) can more easily manage these tasks.

4) Price

The competition in retailing is getting more and fiercer, which actually means that the producers have to hold the sack. The producers are complaining of the low prices. In Hungary we can also see examples for sales at prices lower than the purchasing price.

The retail chains have a great number of financial requirements for the suppliers, for example, additional costs of commercials, contribution to the opening of the store, listing fee, shelf fee, registration fee, administrational expense, price change expenses, bonuses, extra bonuses, progressive bonuses etc. (Nethírlap, 2006). These requirements are not only characteristic for Hungary but these are also generally accepted all over Europe.

4.3. Fresh fruit and vegetable sales channels in Hungary

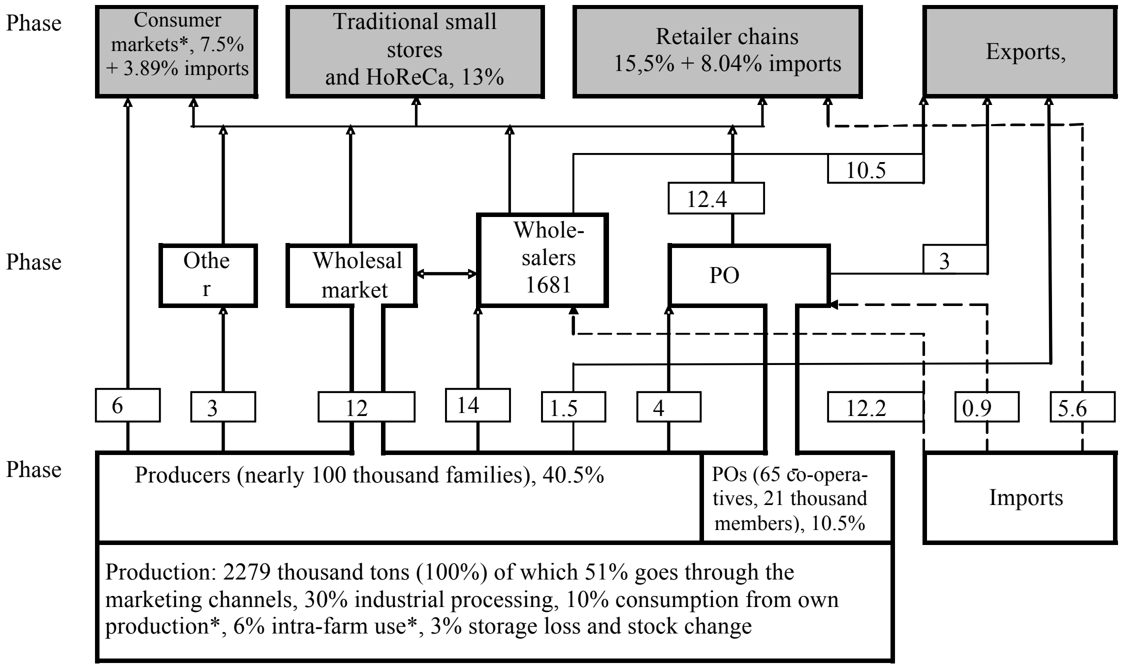
The fresh fruit and vegetable gets from the producer to the customer in two characteristic ways:

- Traditionally in the small stores and physical consumer markets the products of the individual producers can be found (these products mainly arrive through wholesalers and the Budapest Wholesale Market, however sometimes smalls direct sale can also be seen, in particular in the consumer markets),

- Mainly the producers' organisations (POs) or the large-scale producers can supply to the food retailing chains. The small producers – if at all their products access these markets– deliver to the chains through wholesalers (Figure 4).

Figure 4

Phases and sales channels in the fruit and vegetable sector[1]



*averages of 2002-2005

Source: Calculations of the Market Information Department of AKI on the basis of the data of Hungarian Central Statistical Office (HCSO), ACNielsen, in-depth interviews and experts' opinion.

The export of fresh fruit and vegetable accounts for 15% of the production; in which 1.5% is direct sale of the producers, 3% POs, 10.5% exporting wholesalers. 65% of the import supplementing the domestic supply was transported to Hungary by wholesalers, 5% by POs and 30% directly by retail chains.

[1] The data in the figure refer to 2005 and in some cases to the averages of 2002-2005. The data sources are the database of HCSO (KSH), experts' opinion, in-depth interviews and the data of the ACNielsen market research company.

The largest share of the total production of individual producers is sold to the wholesalers and to the wholesale markets (12 and 14%). In the database of HCSO 1681 fruit and vegetable wholesaler companies are registered; from which the 10 most significant ones – of about HUF 1 billion sales revenue, or more – sell products also in the Budapest Wholesale Market, which covers 80% of the total products marketed in wholesale markets.). 6% of the production of individual producers is marketed in consumer markets at the third level, and 1.5% of their products are exported directly.

The POs sell the products of their members directly in the third phase, that is to the retail stores, which are the end of the marketing, or they transport their products to external markets, sales in the second phase is not characteristic.

In the physical markets, which are the final phase, 20.9% of the fresh fruit and vegetable are sold; through the traditional small stores and HoReCa 36.1% of the fresh fruit and vegetable products are sold to the consumers. In the third and final phase the most significant are the retail chains, which sell 43% of the products.

The shares and direction of the sale channels have not changed since 2002-2005. On the basis of indirect data[2] it can be estimated that within the domestic sale the share of modern retailing that is, hypermarkets, supermarkets and discount chains increased to 53% by 2007, while that of traditional retailing decreased to 47%.

In the future it can be expected that the pushing forward of the modern sale channels (hyper and supermarkets and discount chains) will continue and the traditional sales channels (small general stores, fruit and vegetable stores, market) will be pushed into the background. These tendencies will decrease the market access chances of individual producers, therefore, they will have to adapt to these changes!

[2] Information on the changing shares of the sales channels within the retailing phase are provided by the surveys of GfK Hungária and AC Nielsen. Data on the fresh fruit and vegetable are published only rarely, therefore, on the basis of the FMCG category including all types of food products we can draw conclusions on the sale of the fruit and vegetable sale

4.4. The relationship of small fruit and vegetable producers and the chains (summary of the interviews with the food retail chains)

In the following we summarize the content of the interviews made by the fruit and vegetable purchasers of Metro, a Spar, CBA centre and CBA Régió „sub-chain".

It is difficult to provide a definition for small producer. The interviewee provided the following definitions:

- who delivers daily in a value less than HUF 100 thousand;
- who delivers annually in a value less than HUF 10 million;
- who are specialised in only a few articles.

The number of the small producers delivering to the chains interviewed is relatively low (5-15), the only exception is CBA, to the central storage house of which about 300 small producer deliver. However, these are difficult to deal with and they cannot be maintained on the long term otherwise this will lead to efficiency losses.

The share of direct deliveries by small producers in the fruit and vegetable purchase of Metro is 5%, of Spar 1%; while in the domestic chains interviewed it was significantly higher in CBA Régió approximately 30%, in the whole of CBA 40%. The share of small producers was relatively stable in time in the chains interviewed and is not decreasing.

The chains and especially the foreign ones try to limit the number of suppliers due to efficiency reasons; this is one of the obstacles of small-scale deliveries. The amount marketed by wholesalers, POs and large suppliers who undertake to deliver together with their own products also the products of others is significantly larger than the volume of the products directly delivered by small producers.

In addition to the concentration of the small producers' supply a further function of the wholesalers in the supply is to provide services, which the small ones are not able or do not want to provide, such as washing, selection, equalisation, packaging and labelling. However, in the future, small producers will not have the option of supplying through wholesalers as the chains try to exclude all superfluous intermediates and margins in the purchasing. The future of this channel depends on whether the demand of the chains can be met by other suppliers – domestic large producers, POs, or from import. If the answer is 'yes', then this gate will be closed for the small producers.

Concerning the small producers supplying to the chains a significant selection took place in the last years and this process has not finished yet. This holds true especially for CBA where a significant concentration of the suppliers is required.

The characteristics of the small producers supplying to the chains are the following:

- labour intensive products;
- delicate species, at which freshness and quality have a special role;
- products required in small amounts/or values; the large producers are not able to pay attention to such products as they are no so important for them.

Based on the interview such products are the early onion, special varieties of pepper, egg plant, zucchini, cherry tomatoes, special varieties of lettuce, gherkin for fermentation, star formed marrow, chipped marrow. The CBA centre is an exception: even in the case of large volumes such as tomatoes, the products are collected from one hundred producers. At CBA Régió large volumes of even more products are supplied by small producers (potato, cabbage, onion), however, this is due to the much smaller size of the chain.

The chains are satisfied with the products supplied by numerous small producers but they also mentioned some problems (which otherwise are not only characteristic for the small producers but at large producers these are rare)

- Shortage of co-operation in the sales – it should be necessary because of the greater product quantity and range;
- Untrustworthiness in the timing of deliveries, in the quantitative fulfilling of the orders;
- They can not deliver cleaned, sorted, equalized, packaged, labelled products;
- Their moderate willingness for learning, clumsiness – for example in the species change, innovation in packaging.

The interviewee mentioned the following problems: quality, prices, low level of qualifications, ageing producers, rejection of longer terms of payment.

The interviewed had the following suggestions for the increasing of small producers' deliveries

- The small producers should create common marketing organisations or they should join to greater suppliers.
- The small producers have to change their basic standpoint they have to improve their learning and innovation abilities.

Another recommendation is that the professional organisations should play a more significant role and they should undertake to improve of the situation of small producers.

5. Conclusion

The increasing concentration of food retailing is a general tendency in the globalised world. The extent of the concentration is not uniform (and it cannot be) and the comparison is difficult, in particular at international level as the basic data of similar content are lacking (this might cause a problem even at country level). Besides the increasing globalisation of food retailing the small stores are viable in some countries as well as in Hungary – the future is doubtful as well as the supply of the rural areas. The internalization of the food processing industry and the increasing concentration assures the better bargaining position of this sector against the agricultural raw material producers. The situation of the fruit and vegetable sector discussed in the present paper is especially difficult as the fruit and vegetable products are special products compared to other products due to their special characteristics.

In the Hungarian fruit and vegetable sector the significance of the modern sale channels is increasing. The stagnation of real incomes will continuously shift the consumers into the cheap hypermarkets and discount stores.

The fact is that the retailers have a stronger bargaining position against the fruit and vegetable producers, however, we cannot say that there is nothing to do against this. It is not the interest of the traders to eliminate the small producers but there are several ways to demonstrate their dominance. We do not say that the production cooperation and the organisation are magic remedies for sales but stronger cooperation would certainly be required. The basic requirement is the production for marketing. In addition it would also be required that the suppliers should have more information on the demand of the market, especially the large-scale chains. On the basis of the information the requirements of the retailers should be better met not only in order to maintain their position but also in order to be able to develop.

In the discussions being already under way for many years, it is a continuous wish and requirement of the producer side (agricultural commodity production and food processors, too) that the trade should be "restrained" by state intervention, by strict regulations. Though these paper did not cover experiences in this matter suggests that this is not a viable solution. In the relationship of producers and traders, strengthening of the producer side (competitiveness) is necessary for improving their chances for market entry.

From the analysis of the fruit and vegetable sectors of other research it is clear that the lack of operable horizontal and vertical integration constituted one of the most determinative causes of weak competitiveness.

During our research we concentrated on the most important and general problems within the partnership between the retailers and agricultural suppliers. Unfortunately we could not ask directly the small scale producers due to time and capacity limits. In the future we plan to spread our research for the small-scale farms and we also would like to concentrate more on the different aspects of the partnership (commercial law, contracting, food quality requirements, private label). We have started these researches and hope that we will have opinion to present our new results.

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