



Buyer-supplier relationships in the UK fresh produce industry

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Abstract *Examines the dynamic changes that have occurred in the provision of fresh fruit and vegetables to the multiple retail sector in the UK over the last ten years. Supported by both conceptual development and empirical evidence, examines the nature, perceptions and evidence for managed portfolios of relationships that exist between a selection of suppliers and representatives from the major UK multiple retail chains. Recommendations are made to suppliers in managing their retail relationships for long-term growth and security.*

Introduction

The marketing and distribution system for fruit and vegetables has witnessed a number of important changes in recent years. The most significant of these, which has had the most profound influence on the trade, has been the phenomenal growth in the retail market share of the multiple grocers. These outlets accounted for around 62 per cent of fruit and vegetable sales in 1995, compared with 50 per cent in 1990 (*Retail Business*, 1997b).

By 1996 this figure had increased to 70 per cent of sales in a business worth £5.7 billion in the UK (Table I). (The multiple grocers are the major national and regional grocery supermarkets and superstores of more than ten store outlets (IGD, 1996) which, from here on in, are referred to as the multiple retailers.)

The significant increase in retail market share to the multiple retailers reflects the changing purchasing behaviour of consumers attracted to one-stop shopping. Fresh produce (fruit and vegetables) is regarded, by multiple retailers, as a key determinant in store selection by consumers because it provides an attractive, fresh and colourful display at the store entrance as a symbol of pervading quality and high standards throughout the store. But the significant increases in multiple retail market share also reflect the recognition, by these retailers, of the importance of fresh produce to their sales effort. Fresh produce carries some of the highest profit margins of any product category in the store. For some produce, specifically exotics, mark-up is in the region of 100 per cent (*Retail Business*, 1997a).

The change in industry structure caused by the increase in multiple retail market share has also dictated the change in the nature of buyer-supplier relationships within the industry. In trying to maintain high standards of quality, and also cope with the quantities required, both multiple retailers and their suppliers have been keen to increase efficiency and decrease costs. One outcome of this has been higher levels of interaction between the parties in

order to deal with daily issues and problems. This increased level of interaction and an attempt to co-operate and be more open was not needed with previous transactional supply chain arrangements.

Increasingly, the distribution channel for fresh produce between supplier and retailer is now “direct”. Missing out intermediaries such as the wholesale markets, multiple retailers have facilitated the process by organising produce to be delivered direct to their regional depots. Fresh produce is then despatched to stores as part of a composite shipment along with a range of other dry and frozen goods. Suppliers have responded by organising themselves into either marketing co-operatives or agencies to increase the scale of operation, appointing an individual to interact with buyers on a day-to-day basis (Shaw and Gibbs, 1996).

Suppliers, who have “professionalised” their operations by forming co-operatives or agencies, and the UK multiple retailers are the concern of this article. Following a description of the special features of fresh produce supply, the article explores the concept of “relationship marketing” as it relates to the above two groups and reports empirical findings of their relationships within the UK food industry. In particular, this article examines suppliers’ and retailers’ perceptions of their common relationships by measuring the length, developmental stages and their ability to manage portfolios of relationships. In so doing, the article tackles the following questions:

- (1) Do relationships exist in fresh produce retailing?
- (2) How long do they last?
- (3) Do buyers and suppliers perceive their relationships similarly?
- (4) How accurate are suppliers in anticipating the status of their relationships?
- (5) Are suppliers able to manage portfolios of relationships?

Special features of fresh produce supply

Fresh produce (fruit and vegetables), despite sometimes being quite exotic, is a commodity (McLaughlin, 1995). Before direct buying by multiple retailers, patterns of sales confirmed that most fresh produce was sold through regional and local wholesale markets. Consistent with commodities, emphasis was clearly on large volume through-put to a wide number of independent buyers who purchased unbranded, undifferentiated produce on an *ad hoc*, transactional

	1980 (per cent)	1986 (per cent)	1990 (per cent)	1996 (per cent)
Direct to multiples	34	45	50	70
Traditional wholesale	66	55	50	30
Total	100	100	100	100

Source: *Retail Business* (1997a; 1997b)

Table I.
Distribution channels
for fruit and
vegetables, 1980-1996

basis from the supplier who offered the best price and quality at that time. In addition, fresh produce is characterised by high levels of perishability and fragility which requires special packaging for protection and rapid, temperature controlled, transportation. Shelf life is very short. In some cases 24 hours is the maximum time available from field to consumer purchase. This necessitates very rapid harvesting, distribution and shelf stacking procedures. Short shelf life combined with perishability and fragility means that the potential for damage and wastage of produce is high, a problem which both retailers and suppliers are keen to minimise (McLaughlin, 1995).

Compared with multiple retailers, suppliers are in a position of relative weakness in the marketplace (Shaw and Dawson, 1996). They lack brand identity with consumers. This lack of identity is sometimes used by retailers to “strong arm” suppliers who do not comply with quality or delivery standards. Suppliers are also disadvantaged against retailers because of their relatively small size. Most lack the human and financial resources. They work with much smaller profit margins than retailers, commonly, around 3-4 per cent (Shaw and Gibbs, 1996). However, because this figure represents a premium on the margins obtainable from the wholesale markets, certain suppliers commit to trading with the multiples. The penalty for this commitment is that it involves suppliers in large investments in machinery, computerised technology and specialised transportation facilities, which further impacts profit margins.

The multiple retailers are also increasing their position of power within the industry (Ogbonna and Wilkinson, 1996) against even the largest suppliers and manufacturers such as Mars, Unilever and Procter & Gamble. The introduction of store labelled and store branded food products and their success at diversifying into other retailing activities such as petrol and financial services has given them a much increased presence in the retail arena.

However, despite this apparent unbalanced relationship basis, multiple retailers and UK fresh produce suppliers have very good reasons for working closely together. Retailers recognise the significance of fresh produce to consumers and also to their own profitability. They also recognise the importance of freshness, quality and continuity of supply on store shelves. Empty shelves create a negative impression at store entrances. Retailers recognise that to make suppliers as effective and efficient as they require them to be, suppliers need their support and co-operation in both technical and commercial matters. Hughes and Merton (1996) suggest “Grower partnerships with supermarkets are likely to develop towards virtually exclusive supply arrangements”. For example, in 1995 Sainsbury set up a “partnership in produce” scheme with their suppliers which, they point out, has been very successful.

The dynamic changes in the marketplace, the significance of fresh produce to multiple retailers, the needs of retailers as exacting customers and the nature of fresh produce all help to contribute to the unique circumstances

which characterise the multiple retail supply chain for fresh produce in the UK. The following section explores the conceptual significance of relationship marketing to these retail supply chain relationships.

The importance of relationship marketing

Relationship marketing is considered by some academic commentators to represent the beginning of a paradigm shift in marketing (Grönroos, 1994; Gummesson, 1996). As a scope of study, relationship marketing incorporates the entire network of contacts within a particular business “ecosystem” or environment as espoused by Hakansson (1982) and Christopher *et al.* (1991). From a management standpoint, relationship marketing incorporates a service perspective and the importance of the “customer” (Grönroos and Gummesson, 1985; Berry and Parasuraman, 1993). From a strategic standpoint, relationship marketing views the importance of its contacts within its network, and particularly the management of its customer contacts, as a long-term investment and asset of the company. It is particularly the scope, management and strategic emphases which differentiate relationship marketing from the conventional transactional marketing mix approach.

A conclusive definition of relationship marketing has not yet been established. However, a number of authors have put forward definitions (Morgan and Hunt, 1994; Bennett, 1996; Blois, 1996). Grönroos (1996) provides a comprehensive definition that states:

Relationship marketing is to identify and establish, maintain and enhance relationships with customers and other stakeholders, at a profit, so that the objectives of all parties involved are met . . . this is done by mutual exchange and fulfilment of promises.

In this definition, the emphasis is on the importance of not only getting customers and creating transactions (identifying and establishing) but also of maintaining and enhancing “continuing relationships”:

Marketing has both the responsibility of giving promises and the task of fulfilling them (Grönroos, 1996).

Christopher *et al.* (1991) include six markets in their network perspective of relationship marketing. These are customer markets, supplier markets, employee markets, referral (advocates) markets, “influencer” (i.e. banks and governments) markets, and internal markets (i.e. internal suppliers and customers).

Focusing on supplier markets Christopher *et al.* (1991) suggest:

There is mounting evidence of a movement from the traditional adversarial relationship between suppliers and their customers towards a new form of relationship based on co-operation. This emphasises a long-term, very close relationship and a win-win philosophy rather than the win-lose philosophy inherent in adversarial relationships.

In assuming that long-term trading relationships indicate successful relationships, trust and commitment are widely accepted as being central to relationship success (Morgan and Hunt, 1994; Ganesan, 1994; Palmer and

Bejou, 1994; Dion *et al.*, 1995; Bennett, 1996; Fites, 1996; Grönroos, 1996). In his recent work, Kumar (1996) takes the terms trust and commitment a step further by examining the effects of interdependence on relationship building. He suggests that in retailer-manufacturer relationships a company's level of trust and satisfaction with the relationship was highest and the level of perceived conflict was lowest in relationships in which there was a high level of interdependence. A company which feels like a hostage in the relationship will, naturally, try to reduce its dependence on its partner, but would in fact gain much more by trying to become a more valuable resource to the partner, thereby moving the relationship closer to interdependence.

Inherent in the principle of interdependence, relationship marketing advocates two very important objectives: long-term co-operation and mutuality. Long-term relationships are concerned with managing partners for the most effective long-term financial arrangements and trading conditions. Arrangements and conditions which are beneficial to both sides and gained through co-operative work. In essence, trust and commitment create co-operation and mutuality which in turn lead to interdependence. These behavioural requirements are necessary for relationship development, but for long-term prosperity, relationships also need to have strategic and commercial significance (Perrien and Ricard, 1995; Grant and Schlesinger, 1995).

The importance of the relationship development process

Time is the key facilitator in developing long-term relationships. The above mentioned behavioural characteristics cannot be created or enhanced overnight. They belong to a process of evolution and good management practice, and for this to succeed a relationship development process needs to be in evidence. A number of research studies have focused on the management of relationships over time using the concept of "stages of relationship development" (Dwyer *et al.*, 1987; Anderson, 1995). The most notable of these studies was conducted by Ford (1984) who examined the success of extended, continuous relationships between buyers and suppliers. His study was an integral part of the Interaction Approach conducted by the IMP group of researchers (Håkansson, 1982). The group investigated a large selection of companies engaged in the sale and purchase of industrial products. Ford (1984) postulates five temporal stages in the process:

- (1) the pre-relationship stage, during which an evaluation of a new supplier is made;
- (2) the early stage, in which negotiation of a sample delivery is made;
- (3) the development stage, where a contract is signed and deliveries begin;
- (4) the long-term stage, after several major purchases and large-scale deliveries have been made; and
- (5) the final stage, when long-established stable markets have been achieved.

He suggests that certain behavioural changes are likely to occur throughout each of the development stages. In essence, these changes refer to a reduction in uncertainty and distance between the two parties due to an increase in commitment, adaptation and experience gained. There are similarities between Ford's stages of relationship development and the stages identified by the retail and supplier respondents in this research.

Finally, Ping (1993) and Stewart (1998) examine the occurrence of failed relationships in retail markets due to inappropriate management skills. Stewart (1998) suggests that, currently, there is a lack of empirical research to support the notion of relationship development and the inherent problem-solving skills required for such development in the relationship marketing literature. This thought is in line with the author's view that more work needs to be undertaken in order to fully understand the reasons for successful (and unsuccessful) relationship development than has hitherto been explored.

Methodology

After piloting amongst a selection of "industry experts", a semi-structured interview schedule was used to generate conversation around the issue of relationship development. Specific questions were asked concerning the length of relationships, status and management of relationships and, in particular, suppliers' and buyers' perceptions of their common relationships were measured. The approach of separately identifying and empirically measuring both sides of the same relationship is not common in academic research despite the conceptual focus on dyadic relationships. In this research it was regarded as essential in order to obtain a true reflection of the relationship.

To achieve such a dyadic approach, interviews were first held with 14 retail respondents (senior buyers). During the interview process individual suppliers were identified by the buyers. These suppliers (senior marketing executives) constituted the supply sample frame and 14 supplier interviews were completed. In all 44 relationships were identified from these 28 interviews (in some cases suppliers had more than one relationship with retailers and vice versa). Interviews were conducted during the second half of 1997.

In an industry which has seen a great deal of structural change, increase in market shares and the consequent concentration of buying power into fewer and fewer hands, the sample frame of 14 buyers and 14 suppliers does in fact represent the views of over 65 per cent of UK multiple sales and over 55 per cent of supplies for UK field vegetables. Since all the major retailers and their key suppliers were included in the survey, these findings are regarded as being nationally representative.

Empirical findings

Nurturing a relationship over time

In addressing the first two research questions: "Do relationships exist in fresh produce retailing?" and "How long do they last?", the author calculated that the

average life expectancy of the relationships measured was eight years. This was an unexpected result, but even more unexpected was the finding that a third of all trading relationships were still in existence after more than ten years, and one relationship, with Marks & Spencer, was continuing productively after more than 30 years. These results are significant considering that previous commentators have suggested that relationships between these two groups are limited in duration and the level of involvement (Wild, 1990). These results are actually more consistent with the findings in industrial markets where duration is generally accepted as being longer (Hakansson, 1982).

The author was aware that the concepts of relationship development and progressive “stages” of development are ones that may not be apparently obvious to retail and supply respondents. Therefore, respondents were asked “how” they visualised their relationships, and whether they had any concept of development. The author discovered that both buyers and suppliers perceived their relationships in terms of “stages”. It was, thus, important to ask each respondent to label each stage that they perceived. Without being prompted by the author, both groups identified four stages which are summarised below. These findings vary slightly from Ford’s (1984) findings. Ford identified five stages. Respondents revealed that in fresh produce retailing, relationship development is dependent on product and service performance, and also on the levels of trust and commitment that are created in the relationship. The four stages identified in the research are:

- (1) uncommitted;
- (2) developing;
- (3) mature; and
- (4) declining.

In discussing the significance of each stage of development, one supplier suggested:

Relationships with multiple retailers go through recognisable stages. Each stage is an opportunity to improve one’s offering and also cement the relationship more firmly.

A number of respondents also indicated that in the mature stage the largest volumes of produce are traded, as it is at this time that levels of commitment and trust are at their highest. If managed well the mature stage can last for many years, as in the example of the relationship with Marks & Spencer. This relationship is characterised by “open communication and mutual problem solving in order to ensure a seamless supply chain and profitability on both sides”. Consequently, the developing and mature stages are of most interest to retailers and suppliers looking for continuity in their supply chain relationships. Both retailers and suppliers agree that reaching the mature stage is their relationship goal because, financially, both parties have the most to gain. Declining and uncommitted relationships are of little value because

commitment and trust cannot be guaranteed. In uncommitted relationships (usually the early stages of trading) trust and commitment have not had time to evolve. In declining relationships an event or series of events in which misunderstandings have occurred has usually created conflict, leading to a rift or gradual decline in the level of trust. Stewart (1998) discusses relationship failure in more depth.

Perceptions of common relationships

Table II addresses research question three: “Do buyers and suppliers perceive their relationships similarly?”. It illustrates the pattern of relationships indicated by respondents. It is significant, given the fact that both retailers and suppliers acknowledged the different development stages, that they also both perceived the majority of their relationships to be in the developing and mature stages (in fact the numbers of relationships in each category are the same for the two groups – 16 developing relationships and 18 mature relationships). At first sight this indicates that both retailers and suppliers have a high level of awareness of the development stage of each of their relationships and that there is consensus on the stage achieved by each relationship.

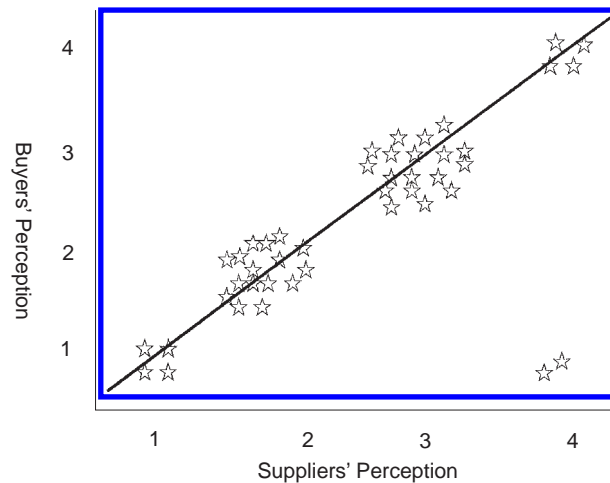
However, this assumes that each relationship recorded is the same relationship on both sides. Therefore, the 16 developing relationships on the buyers’ side are the same 16 developing relationships on the suppliers’ side. If the same assumption is pursued in the other development stages, it appears that for uncommitted and declining relationships buyers and suppliers perceive these slightly differently (one being the inverse of the other). This may indicate that retailers are more reticent at committing to suppliers, but it may also indicate that the development process is not always linear. It is possible that in these situations relationships did not develop but went straight from uncommitted to declining. (From the retailers’ perspective, it would seem they are more willing to classify a relationship as uncommitted. Suppliers are more ready to admit failure with a greater number of declining relationships.)

Figure 1 reveals how each relationship was actually perceived by each party. This Figure eliminates the above assumptions and confirms that, indeed, each relationship is mirrored by both parties in the same stage, but that in a few cases relationships did not progress through the usual stages but were terminated prematurely. We are now able to answer research question four: “How accurate are suppliers in anticipating the status of their relationships?”

Relationship status	Buyers’ perception	Suppliers’ perception
Uncommitted	6	4
Developing	16	16
Mature	18	18
Declining	4	6
Total	44	44

Table II.
Buyer and supplier
perceptions of their
common relationships

Figure 1.
Buyers' and suppliers'
common relationship
stages



Towards a portfolio of relationships

If the majority of relationships pass through sequential stages as they develop and each supplier and each retailer have more than one relationship (as indicated by the fact that this research measured 14 dyads and 44 relationships), it is possible to conclude that both suppliers and retailers are operating portfolios of relationships (i.e. different relationships are in different stages of development at the same time). This provides evidence that relationships are being “managed”, not just as individual relationships but as sets of relationships. From the suppliers’ perspective this spreads risk and prevents the danger of having “all the eggs in one basket”. From the retailers’ perspective it provides continuity of supply which also spreads risk. In so doing, retailers are relying on a small set of “preferred suppliers” with whom they have built up relationships. Within each of these relationships levels of trust, commitment and co-operation are at their highest in the mature stage when volumes of supply are also at their maximum. This level of interdependence was also characterised by other criteria which respondents, in the mature stage, ranked as essential for business/relationship success. These are:

- (1) product quality;
- (2) flexibility (ability to adapt quickly/innovativeness); and
- (3) reliability.

However, it was confirmed that these three were not optional criteria which could be developed and improved/increased upon over time; these three were prerequisites for relationship initiation. Once these are in place and at a satisfactory level the retailer may then consider the supplier for further relationship development, moving the relationship from uncommitted to developing. Ensuring that the relationship did not deteriorate from mature

to declining was a question of managing retailers' expectations through maintaining and enhancing product quality, flexibility (and innovativeness), reliability, volume, price and, ultimately, the relationship itself. In examining the evidence of relationship portfolios, research question five has been addressed: "Are suppliers able to manage portfolios of relationships?"

Conclusions and managerial implications

The key message of this research paper goes to suppliers who are not currently suppliers of the multiple retailers but would like to be, and also to suppliers who have previously initiated communications or trading with multiple retailers but for some reason failed to maintain the contact.

This research has illustrated that the process of supplying fresh produce to the multiple retailers is more complex than it appears and is certainly more complex than it used to be. Trading between the two ceased to be purely transactional about ten years ago because the retailers needed to secure continuity and volume, but these retailers were still financially exploitative. However, in the last two to three years, relationships have become less exploitative and more co-operative as both sides have recognised the need to invest in their supply chain relationships in order to protect their business interests. This is reflected in the observations of this research in which relationships have been recognised for their duration and differentiated stages of development. It has also been established that once created (with a set of requisite criteria) these "preferred suppliers" still do not have the sense of "having arrived" because they are driven to establish the relationships as "mature" in order to maximise volume, security and financial reward.

It is also evident from this research that both retailers and suppliers are working, not with the concept of a single relationship, but are managing sets of relationships as portfolios. This management observation indicates that fresh produce relationships are certainly more sophisticated than was previously anticipated.

However, fresh produce supply cannot be regarded as being as sophisticated in its management style as certain other product sectors within food retailing, such as packaged goods. In this sector, category management, ECR (efficient consumer response) and quick response philosophies have impacted on the nature of relationship management to the point where supplier and retailer organisations are operating almost as one. Integration and sharing of information are extensive and the implications of not being a "preferred supplier" are enormous.

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