

THE ROLE OF THE INDEPENDENT SMALL RETAILERS IN THE HUNGARIAN RETAIL CHAINS

For competitive paper

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ABSTRACT

Hungarian independent small food retailers' importance declines for years. The trade concentration become stronger and follows the North- European and global trends. This process lessens more and more micro and small retailers' chance to survive. This decade-long concentration has been slowed in the second quarter of 2007, when groceries stabilized their market share at 15% within the food trade industry. The authors carried out primary research in order to reveal this stabilization's cause. This stabilization is due to hyper and supermarket chains' spatial modifications and their assortment similarities, or independent small retailers could successfully participate in the different "soft" retail chains? The primary research can help to explain the actual phenomenon. The research examined domestic food soft- franchise associations and therefore it is able to compare and match independent and "bounded" small retailers' data to answer the question: have independent small food retailers a real opportunity to stabilize their 15% market share for the future or the trade concentration will continue?

Keywords: independent food retailers, consumer behavior, soft-franchise association, transformation in Hungarian retailing

Introduction

In the 21st century retailing is the most developing sector of Hungarian national economy. The structure of food retailing has changed significantly over the past 19 years due to foreign direct investments, that is more and more international hypermarkets, supermarkets and discount stores were established. The structure of retailing is frittered in Hungary unlike in West– Europe and similarly to the South– European states, such as Italy, Greece and Spain. Shops with large surface area are popular in France, Belgium and Norway instead of small shops. The market share of Hungarian grocery stores below 200 m² is 38%, which exceeds the average rate of the EU (AcNielsen Research Institute). So it can be said that there is a duality in food retailing just like in the national economy of Hungary: beyond the large multinational companies small firms are also very dominant.

Hypermarkets have the largest market share in the market of fast moving consumer goods (FMCG). This rate fell in the last year, but analysts think that their dominance will increase in the next few years. Supermarkets could intensify their positions just like small shop-chains in 2009. However experts are pessimistic about the future and think that the market share of small shop-chains and independent small shops will fall dramatically. Considering other future predictions for 2013 discount stores will increase their market share since the acceptance of this kind of shops becomes higher and higher among Hungarian society and more and more new companies appear and spread all over the country. What is more due to the economic crisis the solvent demand decreases, which means that the price becomes more and more important in purchasing food and customers turn to cheaper products, especially to the commercial (private label) brands of discount stores. (See Figure 1st)

Table 1 The market share of different types of shops from the turnover of FMCG

	2003	2004	2005	2006	2007	2008	2009	2013
hypermarkets	21.0%	22.0%	23.9%	24.1%	24.7%	23.3%	24.0%	25.0%
supermarkets	14.0%	15.0%	13.7%	14.7%	14.8%	16.6%	19.0%	22.0%
discount stores	15.0%	15.0%	16.5%	17.3%	18.3%	18.4%	17.0%	22.0%
cash & carry	4.0%	4.0%	3.3%	3.3%	3.0%	2.7%	2.0%	1.0%
small shop chains	14.0%	16.0%	14.6%	14.5%	13.6%	14.4%	14.0%	13.0%
independent small shops	21.0%	17.0%	16.2%	15.0%	14.6%	13.7%	14.0%	10.0%
drug stores	1.0%	1.0%	1.9%	2.2%	2.1%	2.2%	3.0%	3.0%
other	10.0%	10.0%	9.8%	8.9%	8.9%	8.7%	9.0%	4.0%

Source: GfK Research Institute (2009) Market Research on FMCG market

2. Theoretical background

According to Levy and Weitz (2004) the essence of retailing strategy is that, firms try to concentrate their resources in order to obtain their short-term and long-term aims. A good strategy defines the target market, the products to sell, the pricing of the products and other services to attract consumers.

Such questions as ‘*What is a good retailing strategy?*’ ‘*How is it possible for small firms to compete with large retailers?*’ arise in case of small enterprises. Academic and business experts are especially interested in these questions. In order to examine these problems we looked at the marketing literature. We found two main directions. A group of authors highlight the strategy of small firms relying on the macro-strategies suggested by Porter, and they identify the competitive advantage of small enterprises. According to Porter (2006) cost-leadership and differentiation strategy can be followed by large companies, which means that small firms can rely on concentration or niche strategy. Another group of authors think that cooperation is a good solution for small firms, or vertical marketing systems (VMS), especially contracted VMS’s are very important in the sector of retailing. Certain companies join all the activities ranging from production to final sale, which are in connection with the product and its distribution (Józsa 2003 Bowersox et al. 1992).

According to Peterson (1989) and Cachon et al. (2004) those small enterprises are successful that take their customers' requirements into consideration, are aware of the needs of their clients and the costs of getting satisfied customers, and determine their marketing-mix strategies regarding these concepts. Terashima and Dawson (2004) think that the price advantage of large firms can be compensated by an attractive image-building strategy of small firms. McGee (1996, 1999) and Berry (2001) emphasize that small shops can compete with larger retailers by an intensive promotional activity, the level of services, the personal relationships, the segmentation, and the continuous control of costs. Nelson and Ratliff (2005), furthermore Onkvisit and Shaw (1981) found in their empirical researches that the success of small retailers is due to the following factors: the relationship with employees (shop assistants) and customers (society); the value creation, which means that shops offer goods with high quality, the service is professional, and the shops respond to market changes quickly. So relationship-oriented and service-oriented strategies are suggested to follow for small retailers in order to be successful and obtain competitive advantage.

Main types of vertical marketing systems are the following: integrated business organizations, contracted vertical marketing systems, and franchise (Berman et al. 2004). There are examples for all the three forms of integration in food retailing.

1. **Integrated business organizations** in which production and distribution are linked in a single company forming an optimal combination. If the manufacturer takes part in distribution and founds its own shop, it is referred to as *forward integration* whereas an integration in which an intermediary takes part in production is called *backward vertical integration* (Józsa 2003, Moutinho 1991). Both forms of integration appear in the Belgian food retailing sector, since the population puts more and more emphasis on healthy lifestyle, and try to avoid genetically manipulated goods (Mormont és Huylensbroeck 2001). Thus manufacturers and retailers are concerned in producing and offering products with high quality, which is possible only through cooperation. These actors of the market can improve the cost-effectiveness, the flow of information and the profitability between the members of the distribution.
2. In case of **contracted vertical marketing systems** or supply/selling alliances used as a terminus in retailing, independent producers and distributors concentrate all their efforts based on contracts into attaining the largest profit in the hope of making more substantial gains than by themselves (Józsa 2003, p. 250., Vranesevic et al. 2006). The degree of integration is quite differentiated; it extends from the pure supply alliance till the complete system-integration. The future path of development is that supply alliances contract for the provision of other functions beyond common supply. Thus payment arrangement, consulting, different financing opportunities, product development, design, marketing activity, same prices, logistics, homogenous appearance are among the common ambitions. An important element of the development of alliances is the common marketing activity and the application of uniform design (Seres 2005, p. 62.).
3. In case of **franchise** an agreement is signed between a franchisee and franchiser company. "*Franchise is a long-range contractual relationship between legally and financially independent parties.*" This cannot only manifest in the form of a vertical marketing system. If a distribution chain expands by way of contracts and capital participation even a horizontal integration can come into being. For a franchisor the advantage with a franchisee is a new possibility for profits by involving "stray" capital while the franchisee benefits from launching a safe and tried company with minimal risks. In the Hungarian food retail sector Coop is a good example for franchise system.

Peculiarities of the three vertical marketing systems are summarized in table 2.

Table 2 Comparison of vertical marketing systems

SYSTEMS CHARACTERISTICS	SELF-OWNED CHAIN	VOLUNTARY NETWORK	FRANCHISE NETWORK
System owner	company management	wholesaler	franchiser
Guiding principles	company objectives	agreement	contract, manual
Economic independence	dependence	independence	limited dependence
Legal independence	complete	independence	independence
Cooperation with system owner	complete	voluntary	intensive
Integration	complete	slight	partial
Image	uniform	individual	uniform
Equipment	prescribed	individual	prescribed
Size	prescribed	individual	prescribed
Location	prescribed	individual	prescribed
Activity	prescribed	different	specified
Possibility for local adaptation	slight	unlimited	limited
Advertising	prescribed	voluntary	specified
Know-how	high	different	high
Organizing	prescribed	different	prescribed
Consultancy	complete	voluntary	specified
Management	complete	none	specified
Training	prescribed	none	prescribed
Control	complete	none	prescribed
Relationship with management	working contract	none	contract
Motivation	salary and premium	profit	profit

Source: Józsa, L. (2003) Marketing strategy, KJK-Kerszöv, Budapest, p. 252.

In the trade of consumer goods beyond multinational retailers, supermarkets, hypermarkets and discount stores Hungarian chain of stores are present significantly. Considering the total turnover of retailers and wholesalers in the FMCG market some Hungarian firms belong to the leaders. For example CBA has the 2nd, Co-op has the 4th, Reál Hungary has the 5th position in the rank of the most dominant commercial firms. We deal with the shops of CBA and Reál in more details since these two small shop-chains are good examples for supply chains or in other words for contracted vertical marketing systems, what is more the number of small independent shops joined to these cooperation is the highest in Hungary.

2.1. Cél supply chain

CBA was founded in 1992, when 10 storekeepers made an alliance, and they bought 17 stores from the KÖZÉRT Corporation during the process of privatization. They made an effort from the start to be 100% of Hungarian property. The firm has grown dynamically and the number of shops has increased widely, and there are more than 3100 shops all over Hungary. In these days CBA operates almost 4000 shops in foreign countries, such as in Slovenia, Slovakia, Croatia, Romania, Bulgaria and Serbia Montenegro. The motto of CBA is “live and leave to live”. The most important principle of this company is the strategic autonomy, which means that shops belonging to CBA can determine their own stock, but they obtain the supply together. Shops have a common sales promotion system, which

consists of price markdowns and leaflets, and the cooperation offers products with good quality at a favorable price. Individual interests are submitted to the interest of the corporation, that is members of the cooperation invest resources together. Continuous expansion is an important objective of CBA, which can be achieved by winning new members to the corporation or obtaining new shops. Cél, Privát and Partner supply chains have been operating since February 1st 2001 and nowadays 1950 such kind of grocery stores can be found in Hungary. Independent small shops are the members of this chain. These shops can enter the corporation without paying fee, and come in for the advantages of the membership like price allowances. CBA guarantees a standardized logo, marketing-activity and uniform dungarees for these small shop-chains, which is different from the original CBA design.

2.2. Reál Pont

The Reál chain is based on similar principles like the “Hungarian supply chain” considering small retailers. The managers of Reál Ltd. come to the conclusion that customers like going to convenience shops, which are close to their homes and belong to a supply chain. Since small shop-chains convince consumers that they will receive high quality services and the product assortment is stable. The company was founded in 2001 and nowadays there are 600 Reál Food Stores and 1700 Reál Pont small shops joined to this cooperation. This supply chains offers similar advantages like the Cél chain, namely ensures

- the condition of suppliers,
- shopping from the depot with unique circumstances,
- spatial security against rivals,
- private label brands,
- and a well organized standardized marketing activity. This means that independent small shops joined to this integration will have a uniform visual design, and will initiate the same sales promotion campaigns, i. e. contests, sweepstakes, and flyers including special offers. Retailers are convinced, too through different trade promotions, such as quarterly refunds of the bought private label brands, and continuous consultancy and support by the integrator company.

This chain offers more opportunity for retailers, than Cél chain, since members have the chance to develop services connected to information technology, bank and telecommunication. Return for these benefits Reál Pont shops have to assume that they participate in price promotions, and in the standardized marketing activity, and order private label products constantly and order products from the regional centers.

3. The empirical study

3.1. Objectives

The objective of our empirical study was to get information about the opinion of managers operating Cél and Reál Pont shops, which are coordinated by CBA and Reál Hungary Ltd. We were particularly interested in the following things:

- ❖ circumstances of the chain-choice,
- ❖ advantages and disadvantages of chain-membership,
- ❖ and satisfaction with the chain and future plans.

We wanted to get answer are there any differences between the two most popular supply chain considering the previously mentioned factors.

3.2. Methodology

In the process of planning the primary research we decided to use the method of qualitative research, which is an unstructured, exploratory research based on small sample and aimed at problem audit. We chose the direct method of qualitative research, and we determined the objective of the research before the interview. So we chose the depth interview, which is a good method for exploring a given problem in more details. According to Malhotra (2005) depth interviewing is useful in the following cases:

- ❖ interviewing the respondents in depth,
- ❖ interviewing experts,
- ❖ or interviewing competitors (p. 215.).

To conduct the qualitative research we used the following depth interview (table 3).

Table 3 Depth interview design

1.	How long have you been a member of the supply chain?
2.	Why did you choose this supply chain?
3.	How did you come into contact with this chain?
4.	What are the advantages of the membership?
5.	Are there any bonus or incentive systems of the network?
6.	What are the disadvantages of the membership?
7.	All in all are you satisfied with the chain?
8.	If you had the opportunity what would you change on the business policy of the chain?
9.	What do you think how would your shop operate if you had not enter the chain?
10.	Did your shop belong to another chain before? If the answer is yes, when did you break off the relationship and why?
11.	Do you want to change a new supply chain? If the answer is yes, why do you want to change?

Source: Own construction

3.3. The sample

The survey was conducted in two counties of the region of West Pannonia, namely in Győr-Moson-Sopron and Vas counties in the summer of 2007. We went to 58 Reál Pont and 28 Cél shops relying on our address-list. Finally we could question 33 managers of Reál Pont and 14 managers of Cél chain due to wrong addresses and refusals, but we also experienced that some shops broke up or resigned from the chain or joined to another chain. The number of visited shops and the number of questioned shops that is the rate of success can be seen in table 2nd. The interviewed grocery stores usually joined to the chain 3 or 5 ago. However in 9 cases we can talk about quite new contracts, since the membership have been lasting for 1 or two years. Furthermore in 9 cases we can talk about quite a long relationship, since the shop owners or managers joined to the chain more that 5 years ago.

Table 4 Circumstances of the survey

	Number of visited shops	Wrong address	Member of another chain	Refuse to answer	Number of questioned shops	Rate of success
Cél	28	9	2	2	14	50.0%
Reál Pont	58	3	3	12	33	56.9%
Altogether	86	12	5	14	47	54.6%

Source: Own research

4. Results

In our study we wanted to understand what the circumstances of chain-choice were, what the advantages and disadvantages of chain-membership are and finally the degree of satisfaction and the future plans of small shop retailers.

4.1. Circumstances of chain-choice

Q1: Are there any differences between Cél any Reál supply chains considering the circumstances of chain-choice?

The most popular **reason for joining to the chain** in case of Cél shops was due to the initiative of sales representatives. Some small shop managers mentioned the lack of opportunity (*'this was the only chain'*) and personal relationships. CBA as former place of purchasing and offering favourable prices and conditions seemed to be good factors of motivation.

In case of Reál Pont shops the chain-choice can be explained by the initiative of sales representatives or former personal and business relationships, and by the beneficial conditions. The advantageous conditions do not only mean price-offs, but also convenience since the integrator company offers free delivery, or the canters have a good accessibility.

There are two ways of **getting touch with** the integrator companies that is with CBA and with Reál: own initiation or the initiation of sales representatives of the chain.

H1: Considering the circumstances of chain-choice is not statistically significant difference between supply chains. Hungarian independent small shops joined to the chain due to the initiative of sales representative.

4.2. Advantages and disadvantages of chain-membership

Q2a: Are there any differences between Cél any Reál supply chains considering the advantages and bonus system of chain-membership?

The managers of Cél shops highlighted special offers, lower prices, delivery of the ordered products, favorable conditions, certain level of independence and informality, good product assortment and the opportunity to participate frequently in demonstrations as the **advantages of chain-membership**.

In case of Reál Pont shops financial benefits were mentioned, such as constant special offers, favorable prices, and refunds. Furthermore managers referred to the free and frequent delivery, the uniform design and flyers within the standardized marketing strategy, and the product assortment, which represents a good price-quality ratio.

The respondents experienced the same **bonus and incentive system** in case of the two different small shop-chains. Price-offs, price allowances, cash refunds, and opportunity for delayed payment (transfer pricing) were emphasized by the managers of both small shop-chains.

However managers of Reál Pont shops also highlighted the sales promotion activities of the chain like contests, sweepstakes, and demonstrations. Some managers considered demonstrations extremely important, because these events give place to novelties and retailers get information about new products and decide whether they want to order them. Demonstrations are good events for relationship-building, where managers of different shops meet and share their experiences, everyday problems.

H2a: Regarding the bonus-and incentive system of the different supply-chains there are not statistically significant differences.

Q2b: Are there any differences between Cél any Reál supply chains considering the disadvantages of chain-membership?

Only three managers of Cél shops mentioned **disadvantages of chain-membership**, namely immediate payment, compulsory product assortment, and the lack of contact, so the integrator do not share the information with chain members.

12 managers of Reál Pont stores said disadvantages of chain membership. Similarly to the other chain compulsory product assortment was mentioned. Retailers have to order a certain amount of private label products, and it is often problematic to sell. Price restriction is another difficulty, since retailers have to sell the special offers on a determined price which is advertised in leaflets offered by the integrator company. Some managers complained about low profit margins considering these private label brands. High prices and constant rise in prices are also disadvantageous for retailers. If they provide products at higher price they will raise their price-level, which means that customers will be disappointed and go shopping to other shops, where the prices are lower. Reál Pont shop managers also experience the lack of contact and bad flow of information from the integrator company.

H2b: Immediate payment, compulsory product assortment and the lack of contact are the most important disadvantages of chain-membership in case of both chains.

4.3. Satisfaction with the chain and future plans

Q3: Are the managers of supply-chains in Hungary satisfied with the membership?

Q4: Are Hungarian supply chains efficient, and offer a solution for independent small shops in order to be a market actor?

The **satisfaction** with Cél supply chain is good among shop managers or owners. 10 managers would not **change anything on the business policy** of CBA. Four respondents presented a suggestion for improving the shortcoming of the current business policy. Sales promotion activity aimed at retailers, e. g. higher rate of price allowances, persistent delivery, and lower prices would be highly recommended by retailers. Four managers think that chain-membership is the only way to be a market actor, and if they **had not entered to the chain**, they would not operate or operate with a lot of difficulties.

The average level of satisfaction in case of Reál shops is higher, since 19 managers mentioned that they would not change anything on the business concept of Reál. Those who think that the current policy should be changed said the following ideas, higher rate of financial allowances aimed at retailers, expansion of product assortment, involving more products in leaflets, more intensive advertisement and sales promotion. Shop managers would put more emphasis on improving communication and expect to receive information about the operation of the supply chain. Retailers suggested extending the chain (winning new members), opening new stores in busy places, and taking into consideration of the problems of small shops originating from the economies of scale. Nine managers think that the only way of surviving the fierce competition for small shops is to join to a supply chain.

H3: Longer the chain-membership, higher the level of satisfaction can be experienced among the managers of small retailers.

Five from the questioned 47 Reál Pont shops **belonged to another chain** before the current supply-chain. They **broke off the relationship** with the former chain more than 3 years ago because of uncomfortable supplying, inflexible business policy and receiving a more favorable offer from the current chain. One Cél and three Reál pont managers **plan to turn to a new supply-chain** in the near future because of unfavorable conditions.

H4: If independent small shops want to be a market actor, they have to cooperate with a supply chain that is chain-membership is the only way for survival in this fierce competition.

H5: Supply chains help small retailers to overcome the problems originating from the economies of scale efficiently.

5. Conclusion and suggestion

Our qualitative study highlighted the aspects of chain-choice by small shops, the ways of getting touch with the chain, the advantages and disadvantages of chain membership, the bonus and incentive system, respectively the suggestions for improving the shortcomings of the current business policy. Variables identified with the analysis of depth interviews are summarized in table 5.

Table .5 Variables identified in the qualitative research

Reasons for chain-choice:	Ways of getting in touch with the chain:
<ol style="list-style-type: none"> 1. The centre of the chain saw the small shops about the cooperation 2. Previous personal relationships 3. Previous business relationships 4. Favorable conditions: <ul style="list-style-type: none"> Price Free delivery Good accessibility of the centers Sales promotion system (cash refunds, price allowances) 5. Lack of opportunity (no other choice) 	<ol style="list-style-type: none"> 1. Initiative of sales representatives of the chain 2. Own initiative
Advantages of chain membership:	Disadvantages of chain membership:
<ol style="list-style-type: none"> 1. Constant special offers 2. Low price 3. Incentives – refunds, demonstration 4. Convenience – free and frequent delivery 	<ol style="list-style-type: none"> 1. Immediate payment 2. Compulsory product assortment 3. Price restriction (in case of promoted and private label brands) 4. High prices (rise in prices)
Advantages of chain membership:	Disadvantages of chain membership:
<ol style="list-style-type: none"> 5. Product assortment with good quality 6. Certain level of independence/informality 7. Standardized marketing concept – visual design, leaflets 	<ol style="list-style-type: none"> 5. Lack of contact
Bonus and incentive system:	Improving the shortcoming of the current business policy:
<ol style="list-style-type: none"> 1. Price-offs, price allowances 2. Refunds 3. Opportunity for delayed payment (transfer pricing) 4. Sales promotion: contests, sweepstakes, demonstration 	<ol style="list-style-type: none"> 1. Higher allowances 2. Persistent delivery 3. More trade promotions 4. Expansion of product palette considering private label brands 5. More intensive advertising 6. Improving communication and information-flow 7. Further expansion in Hungary (opening new stores) 8. Put emphasis on the disadvantages of small shops, mainly the problems of economies of scale

Source: Own research

The qualitative research is not good for making generalizations, but we visited all Reál Pont and Cél shops operating in Győr-Moson-Sopron and Vas counties based on our address list. It is important to remark the phenomenon, which can be observed among small shop-chains and independent small shops that it is hard to evolve a reliable address-list, because the status of these groups of shops change very often. This means that they break off, which is a serious problem nowadays, in the times of financial crisis. Chain-change and refusals made our primary work even more difficult. Unfortunately managers or shop owners are mistrustful when it comes about questioning.

We make the following statements:

- Shop managers opted for chain-membership because of favorable circumstances, former relationships and the centre of the chain saw the small shops about the cooperation.
- Small shops typically got in touch with supply chains through the initiation of sales representatives or due to their former business and personal relationships.
- The most important advantages of chain-memberships are financial allowances, low prices and convenient factors, such as free delivery.
- The majority of shop managers consider refunds and financial allowances as the main bonus-and incentive systems.
- Certain managers think that there are no disadvantages of chain-membership, but there are some skeptic managers who criticize price restriction, higher prices and compulsory product assortment. The lack of contact is also problematic for chain-members.
- Managers are usually satisfied with chain-membership.
- Most of the retailers would not change anything on the business policy of the chain. Some managers proposed more financial allowances and incentives and information flow.
- 5 Reál Pont shop had already belonged to another supply-chain. The reason for breaking off the cooperation can be explained by the dissatisfaction of managers or the closing down of the chain.
- Four retailers have the intention to turn to a new supply-chain due to the disadvantageous conditions.

Based on our research it can be said that small shop-chains operating in the region of West Pannonia consider the functioning of the coordinating company effective. Retailers are satisfied with the sales promotion activity of the central corporation, though they would be glad to receive more incentives such as financial allowances, refunds, commission, demonstration, contests and sweepstakes.

The integrator companies of the supply chains should take into consideration the suggestion for improving the shortcomings of the current business policy, and the perceived disadvantages in order to take the edge off these weaknesses and make their operation even more effective. This is extremely important since small retailers receive offers from other supply chains very often, which means that the satisfaction of small shops determines the success of a chain.

6. Possible future extension of the research

The empirical work introduced in this study is basically an exploratory research, since it is aimed at the thorough understanding of the problem, to make a survey of the efficiency of small shop-chains. We identified those factors that determine the chain-choice and the advantages and disadvantages of chain-membership, the used sales promotion and bonus methods, and suggestions for the change of current business policy. In order to make generalization for supply chains operating in Hungary and improve the validity of our results we plan to conduct a quantitative research, which concerns not only a special area, but the whole country. Relying on the marketing literature and our exploratory research we defined our hypotheses that should be tested with the help of a survey. The next step of our research is to test these hypotheses empirically by personal questioning of supply-chain managers.

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