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# **Evolution of Category Management in UK Supermarket Fresh Produce Networks: A Return to Direct Supply Channels?**

**Martin Hingley**

Department of Business Management and Marketing  
Harper Adams University College, Newport, Shropshire, TF10 8NB,  
United Kingdom

[mhingley@harper-adams.ac.uk](mailto:mhingley@harper-adams.ac.uk)



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*Martin Hingley*

*Department of Business Management and Marketing  
Harper Adams University College, Newport, Shropshire, TF10 8NB,  
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[mhingley@harper-adams.ac.uk](mailto:mhingley@harper-adams.ac.uk)*

### **Abstract**

The premise of this paper is investigation into retailer-driven agri-food supply channels. Food sector dominant UK multiple retailers have in recent years invested in close Category Management (CM) based supply channel relationships with key/ preferred suppliers (Hingley, 2004; Hingley, Lindgreen and Casswell, 2006; Sodano and Hingley, 2007). Category Management allows a nominated supplier to take greater responsibility for the entire supply chain of a given product category and aims to maximise sales and profitability through an end consumer orientation (Jarvis and Woolven, 1999) and this became universally employed by retailers in recent years (Hingley, 2005a). However, critics such as Dapiran and Hogarth-Scott (2003) contend that the development of CM has not necessarily increased co-operation in supply chains and that it can be used by retailers to actually reinforce power and control. Some suppliers are reported as being concerned that risk is put on to the supplier and away from the retailer (Allen 2001; Hingley, 2005a; 2005b). Duffy *et al* (2003) concur, and state that CM in food supply chains has led retailers to a preference for larger suppliers who dominate a product category.

UK retailers have been happy to go down the CM route as by doing so they have off-loaded a good deal of responsibility onto category lead suppliers, whilst retaining channel control (Hingley, 2005b). Most of these retailers have developed a 'super middleman' hub of CM suppliers, based on suppliers' undertaking centralised activities (taking lead on volume, quality and technical, innovation etc) on behalf of their retailer (Hingley, 2005a). This has built a (not necessarily mutual) reliance and enhanced the role of key CM partner suppliers. However, despite the benefits of CM, its infrastructure has a good deal of central control cost and overhead. The core purpose of this study is to establish whether CM has run its course and perhaps circumstances are again evolving towards a leaner, and more direct sourcing philosophy; where stripped-down suppliers can gain a direct route to multiple retailers? The context for this premise is derived from ongoing price pressures in the channel management of what are essentially low value fresh commodities. Such pressure on cost/ price may lead retailers to develop a slimmed down and more direct supply route for many fresh products. In addition to this, supplier criticism and discussion of the more negative aspects of the approach has led retailers to reappraise the future of CM. Further, perhaps retailers no longer require such a close 'relationship' with suppliers (given that the supplier quality/ integrity issues and protocols that initiated such an approach are well established and can be covered by freelance outsourced agents)? For the purpose of this paper, the investigation is preliminary and qualitative, based on depth interviews with members of a fresh produce supplier/ intermediary (sourcing produce widely from around Europe). To follow, further empirical studies will be undertaken using a larger number of semi-structured interviews with key multiple retailer fresh produce Category Managers and CM suppliers in the UK.

**Key words:** *retail supply networks, category management, innovation, fresh produce*

## Introduction

The multiple chain retailers dominate the market for fresh produce (fresh and fresh-prepared fruits, vegetables and salads) in the UK; they have the biggest market share, providing 84% of all UK retail sales. There is steady growth in value sales of fresh produce in the UK, which marks it out against a general decline in most food commodities. In the UK, supermarkets (both directly and through their intermediaries) set both the agenda and the price for the rest of the supply chain. UK Growers and intermediary suppliers feel that the price control exerted by dominant multiple retailers is having a profound effect on their industry and on their future survival and success.

The UK fresh produce supply chain has undergone numerous changes in the last decade, with large supermarket retailers becoming increasingly powerful. The implementation of modern business practices has helped improve efficiency in the UK fresh produce supply chain. This has allowed the chain to break out of the commodity trap and take the fresh produce category out of the commodity trading environment (Fearne and Hughes, 2000: p. 120) by means of innovation and value creation (White, 2000). However, the overall trend is towards the UK fresh produce industry being dominated by a few large corporations on a national level, with some even operating on a European or global scale. In the UK the takeover of one of the largest food retailers, Safeway by Wm. Morrison, has resulted in four major supermarket chains (Tesco, Sainsbury, Wal-Mart Asda and Morrisons) accounting for three-quarters of retail grocery sales (IGD, 2005). Tesco take a third of the value of UK grocery sales alone. This concentration has put further pressure on fresh produce supplier survival and profitability.

In fresh produce, as with all other food categories, retailers initiated the development of Category Management (CM) as a key managerial tool (O'Keefe and Fearne, 2002). In CM a preferred supply takes greater responsibility for the entire supply chain of a given product category. The premise is that CM facilitates greater levels of collaboration in vertical supply channels and underpins relationship development (Barnes et al., 1995). This occurs where a single (lead) supplier organises the supply (from all the suppliers) of a given product category to the retailer. However, such initiatives are seen by some to be simply moving risk and cost onto the supplier and away from the retailer (Allen, 2001). This is an argument put forward in Dapiran and Hogarth-Scott (2003) who contend that the development of CM has not necessarily increased co-operation in supply chains and can be used by retailers to reinforce power and control. This too is the view of Bevilacqua and Petroni (2002), who argue that the larger buying organisation usually streamlines the number of suppliers in order to gain competitive advantage and in the process upsets those that are excluded.

In a CM system the number of suppliers is reduced in order to guarantee consistency rather than there being a reliance on the varying qualities and specifications of different suppliers engaged in continual renegotiation of prices and terms. The CM process has inevitably meant devolved responsibilities to the preferred suppliers. The preferred/nominated lead supplier is likely to be dominant in one product or a group of agri-food lines. Retailers are looking for fewer and larger suppliers who can work with them in vertical 'partnership' (Hingley 2005a; White, 2000). This approach delivers considerable advantages for retailers, in that they can influence entire food channels for given products through singular dyadic interfaces with nominated channel leading intermediaries, or 'Super Middlemen' (Hingley, 2005a). Reducing the number of points of contact for supply not only derives benefits in terms of transaction cost savings, but also relational benefits in dealing with fewer but closer 'partner' suppliers. This has resulted in an overriding

trend towards supply chain concentration of a market determined by the standards of large-scale retailers. The status of super middlemen is the culmination of the process of supply base rationalisation that has resulted in a progressive reduction in the number of suppliers that the major multiple retailers' are prepared to deal with. Retailers have not wanted to deal directly with primary producers and largely the same applies to Growers with respect to participants further downstream (their main interface being with the super middlemen). Retailers are not generally interested in being agricultural producers, importers or food processors, nor in the whole logistic infrastructure which delivers the product to their supermarket shelves. On the contrary, the supermarkets are interested primarily in the business of retailing and the add-on services that are encompassed within their strong brands; most other activities are contracted out. However, the significance of this process is in the way that responsibilities have been devolved. Super middlemen handle the bulk of contact with primary agri-food producers and are thereby at the hub of triadic links between primary producer, middleman and retailer. They shoulder the burden of security of supply; if a crop fails or a key product is in short supply, it is no longer just the buyers' problem to find an alternative source to plug the gap. Maintaining continuity of supply is often also down to the super middleman, who will even procure from competitors in order to satisfy a supermarket's needs. In this way, procurement decision making is delegated by the retailer to the category lead supplier. Super middlemen are the hub for both domestic and overseas products, they may or may not be primary producers themselves, but what they do is manage the flow and mix of supply. It may make perfect sense to procure home grown product, but equally these principal intermediaries will incorporate and (perhaps outside of the domestic season), rely on overseas supply. Supervision of quality assurance is similarly devolved, as is the requirement for creative product development. In such a system as this, super middlemen may be involved in food manufacture and product provision for a spectrum of supermarket own-label products, from the semi-processed to the fully prepared. The super middleman will often lead all suppliers in a given category, making sure that a whole host of technological issues are looked after as well as assuring the continual delivery of high quality agri-food produce. This leaves the question of those suppliers who are not nominated as category leaders for a product or range. Their status becomes that of contract suppliers, who receive significantly reduced contact with the end retail customer; their supply being channelled through the super middleman. However, this does not mean that the same contract producer cannot be a lead supplier, perhaps for another category. UK multiple retailers' generally will not reduce the supply base in a specific category to a sole organisation, for reasons of being able to play-off as few as two suppliers against one another. That said, sole supply does exist and some UK retailers have attempted to streamline their fresh produce supply business into singular hands. But generally sole supply is only in some sub-categories of a larger commodity group of products.

The manifestation of supermarket power via supply base reduction and concentration is not necessarily all bad for fresh produce industry suppliers. Once preferred supply is established, the continual and fierce horizontal supplier competitiveness inherent in securing retailer business is avoided. Super middlemen are certainly more important to retailers, but this does not mean that such suppliers can afford the luxury of too many mistakes, despite value adding through many levels and types of service (as well as of products) their role is still substitutable. However, it does build a higher level of reliance from the retailers, which is to their own advantage as well as that of the beneficiary lead supplier, via the provision of devolved services.

Prior investigation of the impact of Category Management on fresh produce supply was undertaken in Hingley, Lindgreen and Casswell (2006). This study undertook dyadic fresh produce relationships between suppliers/distributors and retail buyers. In this study, the introduction of CM was recognised by all respondents who agreed with Hogarth-Scott (1999) that good supp-

lier-retailer working relationships are critical to CM. However, opinion on the long-term effect of CM differed between retailers and suppliers, with retailers happy that the rationalisation process and focus on fewer/ better suppliers had delivered better efficiencies, economies and results for them. Whilst the suppliers' themselves were more cautious and in some cases negative towards CM, believing the process to exclude growers and allow retailers to drive down price and even quality, as category based suppliers are expected to match for cost equivalent suppliers dealing with retail competitors, in an ever-tightening competitive environment. The fact that suppliers have not enthusiastically embraced CM and also have little trust towards retailers is supported by Bevilacqua and Petroni (2002), who argue that the larger company usually streamlines the number of suppliers to gain competitive advantage, but upsets other suppliers.

## Methodology

It was decided to undertake an exploratory preliminary single case approach with a super middleman supplier, in which depth interviews were conducted with the organisation engaged in 'partner' CM supply with leading UK multiple retailers. It is believed that this constitutes the most appropriate method to emphasise detail, depth, and insight, as well as understanding and explanation (Patton, 1987; Sayre, 2001). In this way semi-structured, personal interviews allowed access to respondents' thoughts, opinions, attitudes, and motivational ideas. The organisation was selected for its ability to contribute new insights, as well as in the expectation that these insights would be replicated (Perry, 1998). The case was selected for reasons of being a typical example (Miles and Huberman, 1994; Patton, 1987) of a fresh produce category management intermediary. Interview questions were standardised around a number of topics (Dibb *et al.*, 1997). Questions were kept deliberately broad to allow interviewees as much freedom in their answers as possible (Glaser and Strauss, 1967).

The principal areas for exploration identified were:

- To identify the impact of the CM process on the supplier organisation's business
- Implications for future (either direct or intermediary based) supply

The fresh produce case organisation can be identified as follows. FP Marketing (name changed for reasons of anonymity) is the central marketing organisation for its own and associated growers produce against customer programmes and is based in the UK, with an annual sales turnover of over 100 million euro. It co-ordinates crop production and volumes both in the UK and overseas and supplies consolidated and value-added (packaged) fresh produce to large multiple retailers in the UK, under retailers' own-label. 90 per cent of their business is in supply to UK multiple retailers, the remainder constitutes product that does not meet retailer specifications, and is marketed to UK wholesalers or processors. The group also has its own transport company. The product range is protected (e.g. glasshouse) fresh produce crops (tomatoes, cucumbers, peppers and so forth) from UK, Northern and Eastern Europe and the same range from protected/ unprotected sources in Southern-Europe. The emphasis for this study is on tomato production and marketing and the vertical relationship of a tomato producer and value-adding intermediary to multiple retailer customers. Interviews with FP Marketing concerned the Commercial Director (CD), and Development Director (DD).

FP Marketing are a Category Management (CM) supplier to UK multiple retailer chains. As the CM process has evolved in the UK, their principal retail customers have pushed FP Marketing to focus and category manage the supply of fresh produce protected crops, hence they have fo-

regone their interests in other crops (for example, in leafy salads); but have gained business in (notably) tomatoes. This meant that the company had to adapt to the loss of some business though CM, but re-focused on other business gained as their category partner retailers nominated category leader by product/ product group. As a result FP Marketing was able to expand its remit, responsibilities and sourcing of tomatoes on behalf of their predominant retail customers:

*We have got Northern European growers, right the way from Belgium to the UK. We have now expanded into Poland for new sources, and that covers the UK seasonal supply/ demand. FP Marketing (CD)*

The CM role for FP Marketing includes managing the seasonal supply of product that takes in Northern European protected crop (as described above), but also that from Southern Europe. Equally important is devolved responsibility from retailer partners for product differentiation. Access to Southern-Italian tomatoes allows this differentiation. What the CM system does is allow retailers to co-ordinate category supply through category leaders like FP Marketing. The intermediary organisation benefits from more business, but must take on an enhanced role and associated responsibilities, and this is becoming increasingly expensive for suppliers. However, FP Marketing does see this as part of a (service based) value-adding process:

*...we have to provide services; we have to provide more resources. That is our added value to the customer, we supply all that technical (input), the agronomists, the ideas, the trials, the NPD, all of this development. There is not a charge for that. FP Marketing (DD)*

The CM system is particularly sensitive to the relative fortunes and activities of a shrinking number of more significant retail customers. When the UK retailer Morrisons acquired Safeway in the UK, this meant one less retail organisation for suppliers to do business with. The impact of this on FP Marketing meant a re-focus of business as Morrisons already had provision for the value-adding activities that FP used to provide for Safeway. FP did not lose all of the Morrisons business after the takeover, but saw this rather as an opportunity to develop new customers, rather than a wholly negative experience:

*.....the Safeway change to Morrisons, has given us the opportunity to expand, because it has created capacity at the factory here. That capacity in the packhouse here gave us the opportunity to expand into other retailers. FP Marketing (CD)*

As a result FP used their CM experience with a big customer like Safeway, to develop a category leader role with other retail customers, to their own as well as the new customer's benefit:

*That is where we were able to introduce CM This was very well received because the smaller retailer needs the supplier to do that little bit more, in terms of the supply chain, the technical approach, or the auditing... FP Marketing (CD)*

So, given their experience in implementing CM for a big customer, FP were able to take a lead role themselves in steering CM for a smaller retail chain, and also subsequently approach new larger retailer customers:

*We have been able to change our staple (range of products) and the type of management to approach a larger retailer. FP Marketing (CD)*

FP are survivors and adapt to change and all that the CM process brings. CM can create reliance of suppliers on fewer and bigger customers, but knowledge of and expertise in the process can allow such an entrepreneurial supplier as FP the flexibility in order to adapt. In fact FP were very critical of the direction some retailers have taken CM in, that is down the road of 'sole supply' and control of aspects of the whole fresh produce category for a retailer by huge and singular 'super middleman' suppliers:

*....With the (named retailer) formula that did happen (sole supply in categories groups of categories), but I think that they have reneagued on that ....* FP Marketing (DD)

FP refer to the policy of one leading UK retailer, of determining sole product and category supply; who then realised that such a prescriptive route had left little room for any product or supplier substitution, and consequently 'went back' on sole-supply arrangements. This concurs with cases in the prior study (Hingley, Lindgreen and Casswell, 2006) FP identify that this approach has failed and that, moreover, the process of supplier engagement is cyclical:

*Everything goes in cycles, so if we were to go back 15 years ago there were lots of suppliers, so supermarkets saw that if there were fewer suppliers: 'we could derive benefit out of that', 'we can share benefit with you' (CM/ partner suppliers).... And then as that plateaus they start thinking....: 'we will get more suppliers in to re-tender for the existing business, because we might be able to get something out of it'. FP Marketing (DD)*

But despite this cyclical effect of engaging and disengaging with suppliers, FP believe that the supply base will not be further rationalised, as retailers face pressure as public companies to deliver increased year on year sales growth, and need a relatively stable supply base in order to deliver this.

The motivation of FP Marketing is to try to add-value to the products it supplies to supermarket customers in order to avoid the 'commodity-trap' of being in an unbranded business, in which retailer own-label is the predominant identity. The CM system has allowed FP to have influence not only in the primary end of supply of products, but also at the market end of their partner customers' business:

*.... (with a larger retailer) you would have a lot more involvement in the CM.... benchmarking, visits, audits... understanding how our products are performing in the 'High Street'. FP Marketing (CD)*

However, control remains firmly in the hands of the multiple retailer customers, whose name and identity value-adding services are conducted in:

*.....supermarkets are very cute (clever), they outsource some of their work to us... We do their work for them, whether it in inventory, in marketing, in procurement. We are continually doing that, so it is a cost that we are bearing... FP Marketing (DD)*

Fresh produce is still very price sensitive and commodity suppliers/ supply chains substitutable, and it is easy to enter the commodity fresh produce market in supply to retailers. CM therefore has benefits in binding the retailer to their suppliers, but by adding value through service to retailers' this costs the suppliers' money and eats into the often slim bottom line:



*The only drawback of CM is... (in) all the mix of resources you provide, the services you are buying (in order to meet retailer needs).... FP Marketing (CD)*

*It (CM) is very beneficial, but that does not take away from the fact that we live and work in a very marginal (profit) industry. FP Marketing (DD)*

But CM based supply does in return provide some security, as it allows intermediaries and primary suppliers to add-value through service. Most of the value-adding services are conducted by the intermediary (in this case FP Marketing) and that allows:

*.....more ownership of the business. FP Marketing (DD)*

A key benefit of CM for the supplier CM is the premise that provision of value added services makes it difficult to take business away from a CM supplier and replicate the benefits of that supplier relationship easily with another supplier. FP considers that at the commodity end of the business supplier substitution is relatively easy, but when considering supplier provision of value added processes and services, this allows some protection:

*We have seen some retailers do that... go to low cost suppliers, because the actual entry cost to supplying supermarkets is relatively cheap. But for us to supply a prepared product we would have to put £0.5m into it (research and development investment) to get the product approved, sampled and tested.... FP Marketing (DD)*

But given the retail price and costs pressures and increasingly competitive nature of retailing, has the age of the value and service adding 'super middleman' come to an end? FP Marketing do acknowledge that there may be scope for more of these value adding activities to take place closer to the country and point of production:

*If they (growers/ grower groups) were able to produce a finished article in Italy, pre-packed in a plastic tray, then you (they could) start driving costs out of the business. FP Marketing (CD)*

However, FP Marketing are quick to point out that to supply the retail market outside of say, Italy, for example the UK, it would be much harder to replace what they do in terms of providing the consolidation (and all that requires in carrying a continual, multi-seasonal and vast range of products and sources); and all of the value-added services that large UK retailers' require. But could fresh produce suppliers see the supermarkets reverting back to direct supply again in order to control costs, and perhaps dismantle the embedded 'close' relationships that have been the product of the CM process? Perhaps direct supply to individual suppliers could deliver the cost savings that retailers are seeking? FP does not believe that this will happen:

*For 16 years we have been looking at reducing costs, and direct supply to the point where we have invested in structures overseas to have one large grower producing one product to cut the cost out the business. Yes it is all there (we have done that), it (by going to direct supply) is reduced cost, fresher, direct..., but the customers we are supplying, whether a small retailer or large retailer do not really have the volumes, the infrastructure systems, it has to come to be centralised at some point; to offer the flexibility, the optimum service that the customer wants. FP Marketing (CD)*

The key point to this above argument is that the retailer customer requires added value services; they will not receive the benefit of all of these by going to source of origin for product and expecting primary producers to be able to deliver this. Further, fresh produce needs to be consolidated at some point in the supply chain (and produce merged with output from other categories) for on-delivery to supermarkets. It pays the retailers to have a trusted partner that can deliver this whole package (including dealing with the variations in cycles of demand, brought about by, for example, promotional offers), and the super-middleman role still appears to be the best means of delivering this:

*...in an ideal world the cheapest way to get a product to the customer is to pack it at source and send it into the (retail) depot or the store, But the reality is, the (retail) depots can't handle the volumes; you need 'carry over' stock, orders go up and down, not all lines are high selling, promotions corrupt sales anyway.... You can promote a product one week and it as a big impact on other products.... So, they (retailers) can't do it (source direct without consolidation and role of middleman). FP Marketing (CD)*

In addition to logistical considerations, FP believes that direct supply cannot replace the other essential value-adding activities of the 'super middleman':

*It is easy to 'sub' out a product to achieve the cost, but do you get the service? When we centralise our products, we probably out-grade about 10% that is not supermarket standard. ....These are out-grades that we would have to put into wholesale markets.... There is less wastage to the retailer if we do it (consolidate product rather than the retailers going to direct supply). FP Marketing (CD)*

## **Conclusions and Recommendations**

This paper has considered by means of review of prior literature and a (singular) case method, whether the predominant supermarket retailer driven route to market for fresh produce will further evolve. Indeed there may be some cyclical element to the way in which retailers deal with suppliers and selection and maintenance of their supply base, concerning whether they require choice from the market place offered by transactional exchange or a reduced, preferred supplier network dominated by 'super middleman' intermediaries. The UK retail market, as in much of the industrialised world is determined by fierce competition between fewer and bigger multiple retailer chains. Pressures from expected returns to shareholders mean an ever tightening squeeze on suppliers. This may well also mean that some products could be 'value-added' at source country of origin (perhaps where costs such as hand-labour) are cheaper. But there are many reasons why retailers will find it difficult to return to purely transactionally based direct supply in fresh produce. Firstly, the retailers themselves have down-sized and out-sourced much of their operations, and to manage a large network of supply means being more hands-on and having more direct decision makers. Secondly, super middlemen provide a valuable and value adding role that allows retailers to remain relatively hands off. These service and value-adding intermediaries add value to product, ensure quality, consolidate from many sources and much more. Further, even if some activities, such as quality inspection could be outsourced to freelance agents, this process still requires management time and attention. However, given all of this, the temptation for retailers to cut cost, by removing the (what they may see to be costly) intermediary infrastructure may be strong. But this will only ever work in areas of commodity marketed products, or where value-added processes can be conducted at source with little direct retailer input. Even in these circumstances, the products will still have to be imported, consolidated in the retailers home or host country and delivered to store. So, indeed the market for fresh

produce, its complex network of inter-relationships is a costly process and stripping it down to a transactional exchange can only really work for the simplest of commodities. For most other products a high service level is still necessary, especially in this age of corporate accountability and product traceability. Therefore, retailers would be unwise to lose the value adding power of their partner suppliers, and these are also suppliers that have often accumulated many years of experience dealing with supply chain problems that could not be easily solved by 'arm's length' suppliers. But in turn those same 'partner' suppliers need to be flexible and adaptable to change and judge in what circumstances that they add true value and service for their retailer customers to earn their 'favoured' supplier status.

Clearly this is an exploratory and preliminary study, based on a very typical intermediary supplier case, as a result, further investigation will be undertaken in comparable and replicable case studies of suppliers in fresh produce, and with their retailer partners. However, the study does provide some useful confirmation of prior work and a clear indication for direction of future study.

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