

Effective Marketing Strategy – Confectionery Industry of Pakistan

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Abstract

The main aim of this paper is to analyse the confectionery industry of Pakistan and to analyse the performance of Innovative Biscuits Limited (IBL) with respect to its competition. The method includes in-depth interviews with the retail channels that include; wholesalers, General Stores (GTs), Local Modern Trade (LMT) stores, and International Modern Trade (IMT) Stores. The results present a vast difference in marketing strategies IBL employs and the rest of the industry. The research also evaluates the factors that impact sales and profitability in the industry. These include the performance of distribution companies, the efficiency of the field sales team, retail channel strategies, consumer taste preferences, and efforts for brand awareness. The paper strategically provides insights to identify areas for improvement, tailor marketing strategies to meet consumer demands and refine product offerings accordingly. The findings of this research can help baked goods manufacturing companies enhance their competitive edge, increase sales, and establish a stronger presence in the Karachi market.

Keywords: *Baked goods, distribution strategy, retailer preferences, packaging, consumption pattern and buying behaviour, product performance.*

JEL Classification: *L66, M30, M37, Q18*

INTRODUCTION

Background of the study

The baked goods industry of Pakistan is highly competitive. This is why; companies are increasingly focusing on developing products that meet the needs and preferences of their target customers. Understanding the factors influencing sales is also crucial for companies

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operating in this sector. Some key elements that have been known to impact sales include effective distribution strategies, sales team performance, choice of retail channels and retail engagement tools, and factors impacting consumer preferences, such as brand awareness.

Distribution partners are vital in reaching customers and ensuring product availability. Efficient distribution channels can enhance a company's market penetration and sales performance. Similarly, the effectiveness of the sales team in managing relationships with retailers, ensuring timely deliveries, and providing excellent customer service can significantly impact sales figures.

An optimal retail channel mix is also essential for biscuit companies to reach their target consumers. Different retail formats, such as supermarkets, hypermarkets, convenience stores, and traditional mom-and-pop shops, cater to diverse customer segments. Understanding which retail channels are popular and preferred by consumers in a specific region can help companies optimise their distribution strategies and allocate resources effectively. The use of modern retail channels such as super markets can increase consumer awareness and accessibility, leading to higher sales and profitability for companies. However, traditional retailers such as bakeries and mom-and-pop stores are still preferred by some consumers despite the rise of modern retail formats.

Therefore, it is essential to consider consumer buying behaviour when selecting distribution channels. The consumer choice of distribution channel is often influenced by factors such as convenience, service quality, product availability, and pricing. Catering to these factors using a multi-channel approach can maximise FMCG sales and profitability. A multi-channel approach may include traditional retail format, modern retail formats, digital technologies and E-commerce platforms to reach a broader range of target customers.

Additionally, consumer preferences play a determining role in purchasing biscuit products and influencing profitability. Consumers often prefer certain biscuit brands based on taste, quality, pricing, packaging size, appearance, reputation, and marketing efforts. Brand awareness and loyalty can greatly impact sales as consumers gravitate towards familiar, trusted brands. Thus, companies heavily invest in marketing and advertising campaigns to increase consumer awareness and demand for their products.

Recently, companies in Pakistan are substituting ticky packs with value packs to increase product prices while keeping the portion size almost similar. Smaller packaging sizes are assumed to be more favoured by consumers as they can help control portion sizes and reduce food waste. Smaller packaging sizes are associated with lower prices; consumers perceive them as more affordable.

Company overview

Innovative Biscuits Limited (IBL) is a Pakistan-based company engaged in manufacturing and selling biscuits and confectionery products. It was established in 2002 and is headquartered in Lahore, Pakistan. The company offers various flavours and packaging options for biscuits, wafers, and cookies.

The company is strongly committed to food safety and quality control, and its facilities are equipped with modern technology and equipment to ensure the highest production

standards. The company consistently innovates products to match the needs of its growing list of customers. IBL is also committed to corporate social responsibility and actively participates in various initiatives related to education, health, and the environment to give back to the community.










The brand has the fourth largest market share; however, some brands, like Digestive and butter crunch, enjoy the greatest market share. IBL is known for its high-quality products, innovative packaging, and affordable prices, and it has a strong presence in the local market of Panjab.

With the expansion into the Karachi market, the company seeks to assess its sales and distribution performance in this new market. Understanding the dynamics of the distribution network is crucial for identifying potential areas for improvement and optimising business strategies. Additionally, exploring retailer and consumer preferences is essential for Innovative Biscuits to align its product offerings with the demands of the Karachi market. This understanding will assist Innovative Biscuits in optimising its product mix and packaging options to align with consumer expectations and maximise market penetration.

IBL's products are available in supermarkets, hypermarkets, convenience stores, and online platforms. The company has distributors assigned to various regions and categories of stores (IMTs, LMTs, GTs). For instance, Innovative Biscuits has one distributor, i.e., M.S. Distributor assigned for LMTs across Karachi, while zonal distributors cater to the kiriyana stores in 9 zones across Karachi.

Company Portfolio and Pricing Structure:

Brands	Description	SKUs	Price & Quantity	Visuals
Digestive	Delicious biscuits made with Whole Wheat and Brown Sugar	Plain	Snack Pack: PKR 10 Mini H. Roll: PKR 20 Box: PKR 115 Half Roll: PKR 30 Box: PKR 169.5	
Butter Crunch	Crunchy Butter Cookies	Butter with Oats	Snack Pack: PKR 10 Mini H. Roll, PKR 20 Box: PKR 115 Half Roll: PKR 30 Box: PKR 169.5	
Olys	Chocolate filled Cookies	Chocolate	Ticky Pack: PKR 5 Box: PKR 144	
Jumbo Junior	Power-packed biscuits that bring together the goodness of milk and glucose	Milky	Ticky Pack: PKR 5 Box: PKR 115	
Choc n Chip	Chocolate Chip Cookies	Chocolate	Ticky Pack: PKR 5 Snack Pack: PKR 10 Box: PKR 144	

Too Gud	Milk and Egg Cookies	Plain	Snack Pack: PKR 10 Mini H. Roll: PKR 20 Box: PKR 115 Half Roll: PKR 30 Box: PKR 169.5	
Goodies	Egg and milk biscuits enticed with lemon flavor	Lemon	Snack Pack: PKR 10 Mini H. Roll: PKR 20 Box: PKR 115 Half Roll: PKR 30 Box: PKR 169.5	
Peanut	Sweet Biscuits with crunchy roasted peanuts	Plain	Ticky Pack: PKR 5 Snack Pack: PKR 10 Half Roll: PKR 20 Box: PKR 115	
Zeera	Purest Zeera baked into tasty salty biscuits	Salty	Ticky Pack: PKR 5 Snack Pack: PKR 10 Half Roll: PKR 20 Box: PKR 115	
Snapp	The crunchy chocolate-coated wafer		Ticky Pack: PKR 5 Box: PKR 115	
Crust Choco Rolls	Crispy wafer rolls loaded with fluffy chocolate cream	Chocolate	Snack Pack: PKR 5 Box: PKR 115	
Crust Creamy Wafers	Layers of sweet-flavoured cream between crispy wafers	Chocolate, Strawberry & Orange	Ticky Pack: PKR 5 Snack Pack: PKR 10 Box: PKR 144	
Frisky	Crunch Wafers filled with layers of flavoured cream	Strawberry, Vanilla, Orange, & Chocolate	Standard Pack: PKR 90	
Frisky Rolls	Crispy Cream filled wafer rolls	Chocolate, Hazelnut, & Milk	Standard Pack: PKR 120	

Problem Statement

Innovative Biscuits has a well-established distribution network in Lahore; however, the brand lags in terms of product penetration, awareness and sales in the newly tapped Karachi region. The brand intends to analyse the sales-force performance in the local market and identify gaps in brand performance.

Objectives

- 1 Provide an in-depth market survey on the performance of Innovative Biscuits' distribution services in the Karachi region's retail segment.
- 2 Gauge the relative sales performance of other brands in the baked goods category.
- 3 Evaluate the type of biscuits (e.g., sweet, salty, etc.) generally preferred by consumers and the possible impact of the discontinuity of ticky packs in the biscuits category.
- 4 Develop gap analysis for Innovative Biscuits for areas of improvement to provide recommendations.

Scope of the study

The scope includes the study of Innovative Biscuits, Peek Freans (English Biscuit Manufacturer), LU (Continental Biscuits Limited), and Bisconni (Ismail Industries Limited), amongst other small players in the industry. The comparison is made regarding market penetration and overall performance regarding retailer and consumer preferences. Further, an analysis of the performance sales teams of Innovative Biscuits is done to provide a gap analysis for performance improvement.

LITERATURE REVIEW

Review of literature

Distribution Channels

Ioana Barin (2009) defines distribution channels as the pathways through which products or services flow from the producer to the consumer. These channels can involve various intermediaries such as wholesalers, retailers, agents, and distributors who facilitate the movement of goods. Effective distribution requires coordination and optimisation of these distribution channels and logistics processes. It involves making decisions regarding selecting distribution channels, managing relationships with intermediaries, ensuring efficient transportation and storage of goods, and implementing strategies to meet customer demands and expectations.

An effective distribution network has consistently been identified as a pivotal and essential element for any manufacturing company or organisation. It has become evident that the absence of a proficient distribution channel can significantly impact profits and even result in business downfall (Kulinska, Giera, & Smaga, 2020). Companies select their distribution strategy primarily based on the nature of the product they offer. For instance, luxury FMCG products are likelier to be sold through premium channels such as department stores and supermarkets. At the same time, everyday biscuits are more likely to be sold through mass-market channels such as convenience stores and discount retailers (Agostini, Bigliardi, Filippelli, & Galati, 2021).

The emergence of e-commerce, mobile shopping, and smart technologies has introduced new competitors and sources of value creation in the retail industry. (Reinartz, Wiegand, & Imschloss, 2019). This emergence has significantly increased the importance of having a multi-channel distribution strategy (Zentes, Morschett, & Schramm-Klein, 2007).

A multichannel strategy refers to the approach taken by businesses to engage with customers and sell their products or services through various channels simultaneously. These channels can include physical stores, e-commerce websites, mobile applications, and more. A multichannel marketing strategy can leverage each channel's strengths and unique characteristics to create synergies to increase sales. Companies are increasingly focusing on improving their distribution systems, particularly in rural areas with a large potential biscuit market (Stojkovic, Lovreta, & Bogetic, 2016).

Consumer Preferences

Humiras Hardi Purba (2019) suggested that before making a purchase, consumers think about many aspects, one of which is the quality of the goods. Quality attributes asked for by customers have become the core of new product innovation. In analysing which quality aspects of baked goods (i.e., bread, cake, biscuits) should be prioritised for generating sales, it is suggested that improvement should be made in the areas of taste, texture, aroma, product appearance, variety, freshness, health, and packaging. Furthermore, the nutritional aspect of baked products also acts as a motivational or psychological factor (Kubicová, Predanócyová, Kadekova, & Košičiarová, 2020).

Whenever it comes to any product that might or might not be related to a bakery, price is a crucial element that comes to play in generating perceptions before the actual purchase. From the customer's perspective, price is what the customer pays or gives for obtaining the product or service. (Lichtenstein et al., 1993). For most consumers, price is the decisive factor as it attracts or repels customers and influences the purchase of specific bakery products (Kubicová & Kádeková, 2011). Hsu (2008) found that perceived price directly affects purchase intention and indirectly affects perceived quality.

A few researchers have examined the shopper's choice across retail formats. Bhatnagar and Ratchford (2004) assumed that consumers choose the retail format that provides the most attractive combination of price, an assortment of products, and travel costs. They conclude that convenience stores charge a higher price but offer minimal travel time, while supermarkets attract shoppers who prefer a larger product assortment. Heavy users, such as consumers with larger families, prefer food warehouses. Fox, Montgomery, and Lodish (2004) study consumer shopping choices among supermarket retailers, mass merchandisers, and drug stores and find that consumers respond to variations in product assortments and promotions more than prices.

Sales team performance

Marić et al. (2009) commented that manufacturing bakery products occupies a special place in the processing industry and suggested a model improve the quality of bakery items. To produce better bakery products, one must improve quality and add value like texture, softness, better ingredients, taste and attractive packaging. To achieve this, SMEs have opted to increase the selling price of bakery products and attract new agents to boost sales.

A study by Celsi and Gilly (2010) analysed that effective ad campaigns target consumers with information focused on the product. (Smith, 1998) concluded that poor communication and lack of understanding may impact perceived product performance and customer satisfaction. (DeSarbo, Jedidi, & Sinha, 2001) discussed that the quality of ingredients used in the production could significantly impact the sale of baked items. A similar study suggested that in some types of laminated products in baked goods (i.e., bread, cakes, and biscuits), the gluten network has to be formed in the laminating step, which is necessary for product structure, freshness and crispness (Chevallier et al., 2000).

Parasuraman, Zeithaml, and Berry (1988) studied consumers' perceptions of a product or service and found the four gaps that may exist in the business supply chain. These gaps are situated as; firstly, a gap between the perceived product and the communicated product;

secondly, a gap between the perception of the product at the store and the perception when us; thirdly, a technological gap; fourthly, a gap between an expected product from a brand or source and the perceived product. (Parasuraman, Zeithaml, Berry, 1988).

According to Kleinginna and Kleinginna (1981), motivation is one of the critical factors in sales and product performance. There is an old saying; “you can take a horse to the water, but you cannot force it to drink; it will drink only if it is thirsty” – so is the case with people. They will do what they want or are otherwise motivated to do. Motivation is an internal state or condition (sometimes described as a need, desire, or want) that activates or energises behaviour and gives its direction.

Several studies on the retail industry have been undertaken about attracting customers and making them buy at a retail store. Several such studies are being cited and referred to. One such research on consumer loyalty to food stores was done by Huddleston, Whipple, and VanAuken (2004). The result showed that advertisement, location, product assortment, service and conveniences such as 24-hour-a-day service and quick checkout – promoted loyalty.

Messinger and Narasimhan (1997) have shown that a shopper’s opportunity cost of time increases the importance of larger assortments. The shoppers are classified as per their characteristics which impact their behaviour. Shoppers classified as “routine” have higher opportunity costs. In contrast, those classified as “random” face low opportunity costs of time and search more widely across stores within larger stores for the best price (Kim & Park, 1997).

Ng et al. (2012) explored a major FMCG baked goods business issue. He pointed out that the managers of SMEs engage in multitasking activities like looking after operational, financial and non-financial matters and focus less time on fieldwork. The other issue concerns agents, as only a few agents, look after the marketing of baked FMCG products.

Product Packaging

Consumers perceive smaller packaging sizes as more portable and easier to carry (Wansink & van Ittersum, 2003). Smaller packaging sizes can positively impact the baked goods category, including helping consumers control their portion sizes, increasing convenience for on-the-go snacking, and improving affordability. Smaller packaging can also be perceived as a healthier option by consumers. (Kivetz & Simonson, 2002).

Smaller packaging sizes can also reduce the amount of packaging material required and thus reduce waste. This can positively impact the environment, adding to a company’s goodwill. However, it is important to consider the overall sustainability of the packaging material and its impact (Tukker, 2004).

METHODOLOGY

Data

Data is collected from primary and secondary sources. For primary qualitative research, in-depth interviews were conducted in the retail segment of Karachi.

Sample

The total population consists of General Trade (GT) channels, including retailers and wholesalers, Local Modern Trade (LMT) channels and International Modern Trade (IMT) channels. A purposive sampling strategy was used to interview procurement managers or shop owners of retail stores across Karachi. The population from Karachi East, West, South, and Malir (Urban) districts was considered for the sample size. These districts contain areas of Gulshan-e-Iqbal, Saddar, Korangi, FB area, North Nazimabad, Nazimabad, Defence, and Clifton. These populations are saturated with SEC A, B, and C target audiences of the consumer segment.

Method/Instrument of data gathering

The qualitative research primarily focused on purposive sampling. Market visits were done to conduct in-depth interviews (IDIs) with IMTs, LMTs, GT stores, Kiryana stores, wholesalers, etc. The research questions catered to the quality of service of distribution network and field sales teams, comparative brand share, and consumer preferences. Each interview was accommodated via a pre-approved discussion guideline.

Secondary research on the competitors' strategies and industry dynamics was conducted through research papers, articles, and related websites. The research included the strengths and strategies the players in the biscuits and confectionery industry applied to understand their position in the market. Other than the popular players, efforts were made to understand the strategies of other players such as Gibs, and Cookania, Mayfair because of their substantial (Unrecorded) market share.

Time Frame

This whole research analysis was completed in four months, from January 2023 to April 2023. In January, exploratory research was conducted to collect secondary data on the internet to understand the dynamics of the biscuit and confectionery industry and explore key players. In the same month, the research objectives and scope of research were finalised. Later in February, the questionnaire was prepared and finalised to guide in-depth interviews. Contacts were established with retailers for the survey. Data collection was completed in March, after which the data analysis began. April marked the completion of the analysis, and the report was concluded.

RESULTS AND ANALYSIS

Secondary Research

For the secondary analysis, data from various credible resources were collected and analysed to gain insights into market dynamics and understand the various distribution channels before conducting interviews with the retail segment.

Industry Overview

There are different categories of biscuits, such as plain biscuits, sweet and hard biscuits, wheat/digestive biscuits, cream-filled biscuits, traditional nan-kataai biscuits, center-filled cookies, waffle biscuits, cookies, French heart biscuits, and others. These are further divided into Pack-

aged and open bakery biscuits. Nearly 70 per cent of Pakistanis consume packaged biscuits, whereas 30 per cent enjoy open bakery biscuits.

Open Bakery biscuits:

Open bakery biscuits are sold through weight. Several bakeries cater to this category with their specialities. A few of them are Jalal Sons, Khalifa, Bundu Khan Foods, Kababjee Bakers, Hobnob, Cakes and Bakes and others.

Packaged Biscuits:

Packaged biscuits come in airtight packaging, providing long shelf life and easy availability. This is why their consumption rate is higher as compared to open biscuits. Packaged biscuits are further classified into locally manufactured biscuits and imported biscuits.

- **Imported Biscuits:**

Few international biscuit companies operate in the Pakistani market, with a market share of less than 8 to 10 per cent. Some common imported biscuit brands are Britannia, Tiffany, Lotus, and others. These brands are regarded for their high quality and unique packaging. Although this category has a small market share compared to packaged players owing to their high price, they still contribute to the overall industry.

- **Local packaged biscuits:**

Local packaged biscuits have a high market share because of easy availability across the country in Kiryana Stores, LMT stores, Marts, Tuc shops and canteens. This sector is highly fragmented, with 6-8 major players holding the majority market share. Small unorganised players dominate the rest of the industry. Major players in the local packaged category are:

- English Biscuits Manufacturers (EBM)
- Continental Biscuits Limited (CBL)
- Bisconni by Ismail Industries Limited
- Innovative Biscuits (Pvt.) Ltd
- Whistlez by Rupali Foods Pvt Ltd
- Gibs by SM Foods
- Cookania by Volka Food International (Pvt.) Ltd
- Kims
- International Biscuits Limited
- United King Foods (Pvt) Ltd
- British Biscuits Company (Pvt.) Ltd.
- Asian Food Industries Ltd.

Market Analysis:

Regarding market share in volume or revenues, Peek Freans by EBM has the biggest market share, followed by Continental Biscuits Limited, and then Bisconni and others. The biscuit industry has grown to ~PKR 90 billion (Source: PACRA). It is not easy to estimate

the exact market size in terms of either units or weight because of the numerous unrecorded varieties of products available.

Some companies focus on sales in the Pakistani market, while others concentrate on Exports and international supply. These companies are known for their brands, wherein some of them have tremendous brand recall & Equity, such as:

- EBM – Peek Freans: Sooper, Peanut Pik, Butter Puff, Gluco.
- CBL – LU: Oreo, Candi, ZeraPlus, Tuc, Prince.
- Bisconni: Cocomo, Chocolate Chip, Rite, Choclatto.

These brands have been available in different SKUs with high price variations over the last year. Numerous factors, such as product, brand, quantity, scale of operations, and packaging, affect the prices. The local players have catered for all demographics and socio-economic classes with the availability in different packaging:

- Ticky Packs – PKR 5 - PKR 10
- Snack Packs – PKR 15 - PKR 30
- Half Rolls – PKR 40 - PKR 60
- Family Packs – PKR 80 to PKR 200

Challenges Faced by the Industry:

Despite issues in the energy sector and counterfeiting, Pakistan’s biscuit business has developed dramatically, with local producers earning more than 90 billion in sales income in the previous financial year. Several household brands have emerged on the scene and succeeded in the sector over the last decade.

The baked goods industry has been hard-struck by the COVID-19 pandemic. Rising raw material prices, heavy reliance on advertising and brand promotion, and excise and import levies on raw materials are all difficulties for future growth. Bakery production, customer happiness, and income are all factors that have been found to impact sales in upcoming challenges (Carl Dominic Virginio, 2022).

Despite the challenges, this industry has much room to grow in domestic sales and exports, notably in Afghanistan, Europe and the Middle. High-quality raw materials are locally available at low cost, providing a competitive advantage over international players through quality product production. In terms of the industry life cycle, the biscuits market is still growing, with new players entering the market.

Company SWOT Analysis

Strengths (Internal)	Weaknesses (Internal)
Produces a variety of biscuits, wafers and baked goods using state-of-the-art facilities and natural ingredients	Limited marketing and advertising budget, which is affecting brand awareness
Diversified product portfolio to match competitors' products	Inefficient supply chain and distribution network
Low prices compared to competitors	Limited market reach beyond the local region
Adoption of automation and technology for distribution efficiency	Lacks innovation and differentiation in its product portfolio

Opportunities (External)	Threats (External)
Expand its market share and reach, ensuring product availability in all zones and entering new markets and segments.	Intense competition from established biscuit brands.
Growing demand for quick snacks that meet dietary restrictions.	Changing consumer preferences towards natural food options.
Leverage digital marketing and social media to increase brand awareness and customer engagement.	New entrants or substitutes that may offer lower prices or better-quality products.
Collaborations with renowned chefs, food bloggers, and local eateries to use the product in their recipes.	Fluctuations in raw material prices or unavailability of imported ingredients may increase production costs or halter production.
Create long-term synergies and partnerships with other food companies or distributors.	

COMPETITOR ANALYSIS

English Biscuit Manufacturers (EBM):

English Biscuit Manufacturers (EBM) is the leading biscuit manufacturer in Pakistan, accounting for almost half of the domestic market. The Karachi-based company has an annual production capacity of over 180,000 tonnes, the largest in the country and one of the largest in the region. Founded as Peek Freans Pakistan Limited in 1966, EBM has been dedicated to over half a century of innovation and quality standards, delighting consumers daily with over 16 well-loved brands.

According to a Nielsen survey, EBM enjoys a 45% market share. They are the makers of Peek Freans biscuits and own the Pied Piper trademark. Sooper, a brand of EBM, accounts for almost half of the company's revenue. When you think of Peek Freans, you think of the quality, taste, and passion for innovation. That is because 50 years of goodness goes into what we do. You can feel it in every biscuit and cake we bake. Our consumers are the ones that make us who we are and continue to drive and inspire us every day.

The company launched Marie in 1971, followed by Butter Puff Biscuit in 1974. This biscuit has become a classic and is still enjoyed today. In 1984, Peek Freans introduced two new products - the "Peanut Pik" and "Zeera" biscuits. These biscuits have become popular snacks and are often enjoyed with tea or coffee. In 1987, the brand introduced the "Gluko" biscuit, which has become a kid's favourite ever since.

In 1996, Peek Freans launched a range of products that included the Rio, Chocolate Sandwich, and Lemon Sandwich biscuits, which are creamy and flavorful sandwich cookies. Additionally, they launched the "Party" and "Sooper" biscuits, which are perfect for snacking at tea time. In 2011, Peek Freans introduced the Farm House Cookies, a range of cookies made with natural ingredients such as oats and honey. The same year, they also introduced the Jam Delight and Click biscuits, which are fruity and delicious snacks.

In 2015, the brand introduced the Nan Khatai and Chocolicious biscuits, traditional Pakistani biscuits with a modern twist. The Nan Khatai biscuit is a buttery and crumbly cookie, while the Chocolicious biscuit is a chocolate chip cookie with a creamy filling. In 2018, Peek Freans launched its cake category with Cake Up. They also introduced the bite-sized Choco

Bites biscuit in 2019, followed by the Cake-UP Triple Chocolate biscuit. Finally, in 2020, Peek Freans introduced its Cake-UP Sandwich biscuit, a soft and creamy sandwich cookie in various flavours.

Company Portfolio and Pricing Structure:

Brands	Description	SKUs	Price	Visuals
Sooper (1996)	Danish-style cookies of milk & egg	Sweet with a taste of milk & egg	Family Pack: PKR 80 Half Roll: PKR 240 Munch Pack: PKR 300 Snack Pack: PKR 240	
Saltish	Savory crispy bit sized biscuits	Salty	Half Roll: PKR 240 Munch Pack: PKR 250 Snack Pack: PKR 180	
Rio (1996)	Cream sandwiched between two biscuits	Strawberry, chocolate, vanilla & sprinkle	Family Pack: PKR 80 Half Roll: PKR 240 Munch Pack: PKR 300 Snack Pack: PKR 240	
Gluco (1987)	Nutritional sweet biscuits	Sweet	Family Pack: PKR 80 Half Roll: PKR 240 Munch Pack: PKR 300 Snack Pack: PKR 240	
Butter Puff (1974)	Airy cracker in a crisp glaze of butter	Salty & Sweet	Family Pack: PKR 80 Half Roll: PKR 240 Munch Pack: PKR 300 Snack Pack: PKR 240	
Marie (1971)	Sugary and sweet biscuits	Sweet	Family Pack: PKR 80 Half Roll: PKR 240 Munch Pack: PKR 300 Snack Pack: PKR 240	
Peanut Pik (1984)	A blend of both peanut and pistachio imported nuts with pistachio nuts sprinkled on top	Sweet & crunchy	Family Pack: PKR 90 Half Roll: PKR 240 Munch Pack: PKR 300 Snack Pack: PKR 240	
Zeera (1984)	A savory biscuit flavoured with cumin seeds	Salty	Family Pack: PKR 90 Half Roll: PKR 240 Munch Pack: PKR 300 Snack Pack: PKR 240	
Party (1996)	Raisins and crunchy peanuts	Sweet & crunchy	Family Pack: PKR 90 Half Roll: PKR 240 Munch Pack: PKR 300 Snack Pack: PKR 240	
Chocolicious (2015)	Chocolate filled inside a double chocolate chip cookie	Chocolate chip cookies	Family Pack: PKR 150 Half Roll: PKR 90 Munch Pack: PKR 240 Snack Pack: PKR 240	
Chocolate/ Lemon Sandwich (1996)	Chocolate cream-filled biscuit sandwich	Creamy biscuits in chocolate & lemon flavours	Family Pack: PKR 80 Half Roll: PKR 240 Munch Pack: PKR 300 Snack Pack: PKR 240	

Continental Biscuits Ltd (CBL):





Continental Biscuits Limited (CBL) is a Pakistan-based biscuit manufacturing company that produces a wide range of baked goods, including biscuits, wafers, and cakes. The company






was founded in 1984 and is headquartered in Karachi, Pakistan. It is a subsidiary of the United Kingdom-based investment company United Biscuits (UB), one of the world's largest biscuit manufacturers.

CBL's product portfolio includes a variety of biscuits, such as cream crackers, digestive biscuits, Marie biscuits, chocolate chip biscuits, and sandwich biscuits, among others. The company's cake range includes fruit cakes, sponge cakes, and cupcakes, while its wafer products include chocolate and vanilla wafers.

CBL has a strong distribution network in Pakistan, and its products are widely available in retail stores and supermarkets nationwide. The company also exports its products to several countries in the Middle East, Africa, and Asia. CBL is a publicly traded company listed on the Pakistan Stock Exchange. The company employs over 1,500 people and has production facilities in Karachi and Lahore.

Company Portfolio and Pricing Structure:

				
Brands	Description	SKUs	Price	Visuals
Tuc	Light and salty	Salty	Bar Pack: PKR 15 Snack Pack: PKR 40 Family Pack: PKR 80 PKR 240/box	
Oreo	Rich, Creamy filled cookies	Chocolate, Strawberry, Original	Mini: PKR 10 PKR 120/box Bar Pack: PKR 15 PKR 180/box Snack Pack: PKR 30 PKR 300/box Family Pack: PKR 50	
Prince	Chocolate sandwich biscuit	Fingers, biscuits, Mini biscuits, chocolate covered biscuits, choco jammies	Bar Pack: PKR 15 Snack Pack: PKR 30 Family Pack: PKR 80 PKR 240/box	
Zeera Plus	Sweet and salty	Sweet and salty	Bar Pack: PKR 15 PKR 180/box Snack Pack: PKR 30 PKR 240/box Family Pack: PKR 80	
Wheatable	Healthy, high in fibre	Sugar-free, High fibre digestive	PKR 15, PKR 40 & PKR 90 PKR 240/box	
Gala	Milk and egg	Original,	Bar Pack: PKR 10, PKR 120/box Snack Pack: PKR 30 PKR 180/box Family Pack: PKR 80	
Candi	Caramelised biscuit	Sweet and crunchy	Bar Pack: PKR 20 Snack Pack: PKR 40 Family Pack: PKR 80 PKR 240/box	
Tiger	Calcium energy biscuit	Sweet	Ticky Pack: PKR 5 Bar Pack: PKR 10 PKR 120/box	

Micolu	Vanilla cream-filled sandwich biscuit	Creamy, waffle milk biscuit	Bar pack: PKR 15 box Snack pack: PKR 25 PKR 150/box Waffle: PKR 15 PKR 240/box	
Bakeri Nankhatai	Sweet	Original	Bar Pack: PKR 20 Snack pack: PKR 40 Family Pack: PKR 80 PKR 240 box	
Bakeri Coconut cookies	Coconut cookies	Coconut	Bar Pack: PKR 20 Snack pack: PKR 40 Family Pack: PKR 80 PKR 240 box	
Bakeri Butter Cooking	Butter Cookies	Chocolate on vanilla or Vanilla on Chocolate	Bar Pack: PKR 20 Snack pack: PKR 40 Family Pack: PKR 80 PKR 240 box	
Bakeri Bistiks	Lemon essence cookies	Lemon	Bar Pack: PKR 20 Snack pack: PKR 40 Family Pack: PKR 80 PKR 240 box	





Bisconni:












Bisconni is an FMCG brand that produces biscuits, cookies, and other baked goods. The company was founded in 2002 and has since become one of the leading players in Pakistan's biscuit market. The range of products offered by the company offers sweet and Savory biscuits, cream biscuits, sandwich biscuits, cakes, and wafer rolls. The brand is known for its high-quality ingredients, unique flavours, and attractive packaging. Some of its most popular pioneer products include Cocomo, Chocolato, Novita, Chocolate Chip Cookies, and Rite,

In addition to its focus on product quality, Bisconni is also known for its strong marketing efforts. The brand frequently collaborates with popular Pakistani celebrities and influencers to promote its products and engage with its target audience. Bisconni has also invested in digital marketing and Television advertising campaigns to reach its target audience and build its brand reputation.

Bisconni's commitment to innovation and quality has earned it a loyal customer base in Pakistan and beyond. The company continues expanding its product line and distribution network, making its products more widely available to consumers nationwide.

Company Portfolio and Pricing Structure:

				
Brands	Description	SKUs	Price & Quantity	Visuals
Cocomo	Centre-filled Cookies	Chocolate, Milk, Strawberry, and Orange	Ticky Pack: PKR 5 (4 cookies), Snack Pack: PKR 10 (7 cookies) Value Pack: PKR 20 (14 cookies) Party pack: PKR 40 (22 cookies) Pouch: PKR 70 (40 cookies) PKR 240/box	
Chocolatto	Rich, Creamy, Chocolate filled cookies	Chocolate	Ticky Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30 Family Pack: PKR 70 PKR 240/box	

Chocolate chip	Crunchy, chocolate chip cookies	Chocolate chip, Chocolate chip loaded, bite-sized cookies, Vanilla	Loaded: PKR 15 (3 cookies) Original: PKR 10 & PKR 20 Vanilla: PKR 10 & PKR 20 Family Pack: PKR 50 Mini Pouch: PKR 70 240/box	
Rite	Black biscuits with vanilla cream	Chocolate and Vanilla	Ticky Pack: PKR 10 Snack Pack: PKR 20 PKR 240/box Half Roll: PKR 30 (6 Biscuits) PKR 300/box	
Craving	Coconut Biscuits	Coconut	Snack Pack: PKR 15 Half Roll: PKR 30 (6 biscuits) Family Pack: PKR 40 PKR 240/box	
Novita	Four-layered wafer with three layers of deliciously smooth cream filling	Chocolate, Orange, Banana, Lemon, Double chocolate, & Choco berry	Ticky Pack: PKR 15 Snack Pack: PKR 30 Pouch: PKR 50 PKR 240/box	
Chai Wala Biskut	Egg & Milk Biscuits for tea time	Milk	Ticky Pack: PKR 10 Snack Pack: PKR 20 (6 Biscuits) Family Pack: PKR 60 PKR 240/box	
Crux	Baked, salty and crispy crackers	Salty	Ticky Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30 Family Pack: PKR 60 PKR 240/box	
Nice	Sugar Sprinkled Coconut Biscuits	Coconut	Snack Pack: PKR 15 Half Roll: PKR 30 PKR 240/box	
Day Dream	Premium Coffee Cookies with rich chocolate inside	Coffee chocolate	PKR 150 (15 Cookies) To be PKR 200	
Chip Hop	Premium Cookies with Chocolate Chips	Vanilla and Chocolate	PKR 150 (12 Cookies)	
Flo	Chocolate-dipped cake	Chocolate & Vanilla	Ticky Pack: PKR 10 Snack Pack: PKR 20	
Rollies	Coated Swiss Cake Rolls	Chocolate on vanilla, Vanilla on chocolate, Double Vanilla, Strawberry Vanilla	PKR 35	

Cookania:

Volka Food International (Pvt.) Ltd. has taken great pride in its status as Pakistan's foremost producer of pasta, bakery, and confectionery goods for 12 years by its leading brand Cookania. They have grown into one of the country's largest food production companies by dedicating their selves to producing top-quality products, serving as a shining example for the local food industry. Cookania's range includes Plain sweet biscuits & cookies, creamy biscuits, wafers, chocolate filled, cupcakes and more.

The brand maintains the highest standards in the industry by implementing best hygiene

practices and utilising state-of-the-art production processes, guaranteeing unparalleled quality. Our unwavering commitment to adhering to all food regulations and stringent quality control measures in every aspect of our operations aims to set an exemplary benchmark for the entire industry.

Company Portfolio and Pricing Structure:

					
Brands	Description	SKUs	Price	Visuals	
Tea Time		Lemon Vanilla & Chocolate Choc-olate: Available in PKR 10, 20, & 30 only	Ticky Pack: PKR 5 Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30 Family Pack: PKR 60		
Khas Khatai		Nan Katai	Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30		
Butter Bix	Plain Sweet Bis-cuits and Cookies	Chocolate with Butter	Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30 Family Pack: PKR 60		
King		Plain Vanilla	Ticky Pack: PKR 5 Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30 Family Pack: PKR 60		
Butter Cookies		Butter	Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30		
Pik a Nut	Nutty and Crunchy Biscuits	Peanut	Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30 Family Pack: PKR 60		
Zeera Classic	Classic Zeera Biscuits	Zeera	Ticky Pack: PKR 5 Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30 Family Pack: PKR 60		
Lemon and Choco-late Sandwich	Sandwiched biscuits	Chocolate cream & lemon cream	Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30		
Pirates	Chocolate cream and crisp biscuit	Chocolate	Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30		
RaspBerry And Cream	Sandwiched biscuit	RaspBerry And Cream	Snack Pack: PKR 20 Half Roll: PKR 30 Family Pack: PKR 60		
Dream Cream	Double flavored sandwiched biscuits	Chocolate vanilla & Strawberry vanilla	Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30 Family Pack: PKR 60		

Cocodelite	Coconut biscuits	Coconut	Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30	
Milkabish	Nutrient packed energy biscuits	Milk	Ticky Pack: PKR 5 Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30	
Choco Chip	Chocolate chip cookies	Chocolate Chip	Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30 Family Pack: PKR 60	
Meltz	Centre filled cookies	Caramel Filled Chocolate Coated	Snack Pack: PKR 20 Half Roll: PKR 30 Family Pack: PKR 60	
ChocoLava		Chocolate	Mini S. Pack: PKR 10 Snack Pack: PKR 20 Half Roll: PKR 30	
Hello Panda	Chocolate filled biscuits	Chocolate	Mini S. Pack: PKR 10	
Dewberry	Jam Filled Cookies	Cream and Strawberry Jam	Mini S. Pack: PKR 10 Snack Pack: PKR 20	
Twinky Cup Cake	Centre filled cupcakes	Strawberry & Chocolate	Standard Pack: PKR 20	
Tea Time Soft Cake	Curvy Surface Cake	Vanilla	Standard Pack: PKR 30	
Twinky Plain	Slice Cake	Plain, fruit and marble Fruity	Standard pack: PKR 20	



Gibs:


















SM Foods Limited was introduced in 2000 as a manufacturer of biscuits, wafers, jellies, chocolates, and confectionery items. Its flagship brand, Gibs, has established the company as a leading producer of high-quality, innovative and value-for-money food products in Pakistan. Over the years, SM Foods Limited has expanded its product range to include bakery, confectionery, snacks, pasta, ketchup, chilli garlic, and mayonnaise.






With Gibs as its shining star, the company has set new standards in the industry by using organic ingredients, ensuring freshness, and retaining the nutritional value of its products. Gibs stands out in the highly competitive market for its exceptional taste, quality, innovation, and value.

Overall, SM Foods Limited is committed to providing its customers with the best possible food products in the whole range but bakery items specifically as they offer an extensive assortment of baked goods while maintaining its reputation as a pioneer for the whole category in the industry.

Company Portfolio and Pricing Structure:

			
Brands	Description	Price	Visuals

Mukhan Wala	Butter and Cookies	PKR 20 PKR 30 PKR 40	
Zeera Wala	Bakey Style Cookies	PKR 20 PKR 30 PKR 40	
Butter Cookies	Butter Cookies	PKR 5 PKR 10 PKR 20	
Speedo	Egg & Milk	PKR 10 PKR 20	
Tea Time	Fine Line Biscuits	PKR 10	
Top	Fine Line Biscuits	PKR 10	
Double Cream	Double Cream	PKR 5 PKR 10	
Marie	Marie	PKR 10	
Crispy Zeera	Crispy Zeera	PKR 10 PKR 20	
Glucose	Glucose	PKR 5 PKR 10	
Real Taste Quality	Real Taste Quality	PKR 5 PKR 10	
Grace	Grace	PKR 5 PKR 10	
Pea & Pea	Pea & Pea	PKR 10 PKR 20	
Peanut Pista	Peanut Pista	PKR 5 PKR 10 PKR 20	
Revo	Milk and Strawberry	PKR 5	
Cookiez	Pineapple & Coconut	PKR 10 PKR 20	
Supreme	Egg & Milk Cookies	PKR 40	

Bakes	Bakery Style Cookies	PKR 40	
Baby Food	Energy Biscuits	PKR 5 PKR 10	
Original Kremore	Strawberry	PKR 5 PKR 10	
Coconut Cookies	Coconut Cookies	PKR 5 PKR 10 PKR 20	
More Peanut	More Peanut	PKR 5 PKR 10	
Revo	Banana Sandwich	PKR 5	
Khas Peanut Biscuits	Khas Peanut Biscuits	PKR 5 PKR 10	
Original Kremore	Banana Sandwich	PKR 5	
Lion Energy Biscuits	Lion Energy Biscuits	PKR 5	
Panjeeri	Traditional Biscuits	PKR 5	
UP Classic Cookies	Milk & Egg & Chocolate	PKR 5 PKR 10 PKR 20	
Premo	Chocolate	PKR 5 PKR 10	
Mango Masti	Mango Masti	PKR 5 PKR 10	
Smooper	Egg & Milk Cookies	PKR 5 PKR 10 PKR 20	
Milku	Honey & Milk Biscuits	PKR 10 PKR 20	
Milkoney	Honey & Milk Flavoured	PKR 20 PKR 30	
Jam Jam	Vanilla & Strawberry	PKR 5 PKR 10	
Classic Lemon	Classic Lemon	PKR 5 PKR 10	
Short Cake	Short Cake	PKR 5	
Revo	Vanilla & Strawberry	PKR 10	

Waviz	Peach Waviz Wafers	PKR 10	
Cream	Cream Wafers	PKR 10	
Crispe	Coconut, Orange, Banana, and Strawberry Wafers	PKR 10	
BulBulay	Banana & Tutti Frutti Wafers	PKR 5	
Leger	Orange Wafers	PKR 5	
Love Rolls	Strawberry Wafers	PKR 5	
Love Bite	Creamy Pillow Wafers	PKR 5	
Kup Cake	Strawberry & Chocolate	PKR 10	
Swiss Cream Roll Cake	Strawberry, Banana & Chocolate	PKR 10 PKR 20	
Cake Time	Plain Cake Slice	PKR 10 PKR 20	
Cake Time	Marble Cake	PKR 10	
Donut Delight	Plain, Coconut, & Chocolate	PKR 10	
Soft Cake	Banana & Strawberry	PKR 5	
Softbite	Chocolate Vanilla & Strawberry Vanilla	PKR 10	
Cup Cake	Strawberry	PKR 5 PKR 10	

Primary Research

The data from primary qualitative research is analysed to gain insights into market dynamics. All together 150 retail stores were visited to collect information regarding brand performance, competition, distribution chain, and retailer and customer preferences.

Relative Brand Performance:

Gulshan-e-Iqbal: In interviews with the procurement manager of the various retail stores, it was found that Peek Freans dominates the sales in the FMCG baked goods category. Because of its brands' popularity amongst consumers, it is given more than 50% of shelf space in stores. After Peek Freans, most stores' second most-selling and prominent brands were LU (35% shelf space) and Bisconni (10%). Other than the popular brands, Mayfair, Britannia, Cookania, Gibs, and imported biscuits also made sales in some stores. Innovative Biscuits appeared to have a limited presence with less than 25% market share. Amongst the stores that stocked Innovative Biscuits, most had only 2 to 3 boxes of Digestive and Butter Crunch because these are running products. Only one store, i.e., the JK store, had the wafers category of the brand.

Defense (DHA): All the stores maintain stock levels according to the demand sheet. However, it was noted that LU is having stock level issues with Carrefour, where it was found that the company is having some production issues due to which the mart was only maintaining stocks sufficient for only one shelf turnover.

Peek Freans and LU equally held the market share of consumer discounts, trade marketing schemes such as gondolas and banners, and better PR with store managers. The brands had primary displays at Carrefour, which were also coupled with consumer discounts. Bisconni also held prominent visibility with a consumer-focused discount of plus-one in Cocomo Boxes. Peek Freans and LU actively use trade marketing tools in the DHA region. Where Peek Freans has sponsored the shop board of Nice Super Market, LU has ensured its visibility through out-of-shop advertisements. It is important because, in the region, shop owners observe brand availability and awareness in the market.

Clifton: Availability seems to be an issue for Innovative Biscuits, especially outside the Clifton area. In Clifton, only two stores, namely Mottas and Diamond General Store, had all product categories available. Additionally, 65% of the remaining stores had only two categories, "Butter Crunch" and "Digestive", available. These biscuits were available in limited quantities (one or two boxes) and were stored at the top or the side of the display, impacting the brand's visibility. The remaining 35% of the stores did not have Innovative Biscuits at all.

Korangi: Peek Freans dominate the market with over 60% of the share, followed by LU with 35% of the share, and companies like Bisconni and Mayfair hold the remaining 5% share. Only one LMT, i.e., Babu Super Market, had all product categories of Innovative Biscuits available. The store also had shelf dockers of the brand installed on shelves; however, those shelves were instead allotted to Peek Freans. The brand appears to have not focused on its planogram in the store. This could be impacting sales negatively. Other than the aforementioned store, the remaining 90% of the stores in the region did not have any biscuit of Innovative Biscuits.

F.B Area: Peak Freans and LU dominate the market in the region. Of the 30 visited stores, 40% of the shops had innovative biscuits available. Despite the availability of the brand, only

one product category, i.e., Digestive biscuits, was most commonly available. Only a few stores had stocked all product categories.

Nazimabad & North Nazimabad: The availability of Innovative Biscuits was limited in more than 50% of shops in the aforementioned areas. Most shopkeepers had no idea about the brand, and a few even though the moderator was inquiring about the Novita brand of Biscoinni. Some shopkeepers were unsure if the brand was local or imported. In 4 or 5 shops, upon asking for Innovative Biscuits, the answer was no, but on the bottom of the shelf, one or two boxes were found. Due to a lack of brand awareness, shopkeepers did not know about the brand. Only one shop among all the visited stores carried 5 to 6 varieties of Innovative Biscuits. It is worth mentioning that big grocery stores did not have Innovative Biscuits at all. On the contrary, shop owners were well aware of the product categories of Peak Freans.

Old City: In the old city, very few shops had Innovative Biscuits with limited options (Digestive, Butter Crunch & Zeera) and limited stock (2-3 Packets). During the visit to the area, it was observed that 45% of the shelf space was occupied by EBM biscuits, 43% by CBL biscuits, 7% by Biscoinni biscuits, and 5% by other brands, including Mayfair, Cookania, Bakeri, and Kolson.

Distribution Service and Sales Team Performance

Gulshan-e-Iqbal: The stores reported lower sales and unavailability of order bookers as the main reason for keeping lower stock levels for Innovative Biscuits. The regional wholesaler, “Bismillah Wholesale”, confirmed that the trade price of the brand was lower than other prominent brands and was also available at cut price from parties other than the distributor. This is why a few store owners do not even order biscuits directly from the brand. This threatens the brand in terms of lost margins and unrecorded sales.

Defense (DHA): Out of all the stores that were visited, Innovative Biscuits were found at Carrefour, Imtiaz, and Pepis. It appears to be because of the efficient performance of M.S. distributors. It is important to note that EBM does not place its products at Imtiaz because of high margin requirements; hence, the LMT has space for other brands in the baking and confectionery aisle. The prices at Imtiaz differed from the general retail prices of the company. SKU-wise box prices for Ticky Pack (TP), Snack Pack (SP), Mini Half Roll (MHR), and Half Roll (HR) are given as under:

Brands	Pricing at Imtiaz	Company Pricing
Digestive	SP: PKR 10 (Box: PKR 102) HR: PKR 30 (Box: PKR 155)	SP: PKR 10 (Box: PKR 115) HR: PKR 30 (Box: PKR 169.5)
Butter Crunch	HR: PKR 30 (Box: PKR 155)	SP: PKR 10 & MHR: PKR 20 (Box: PKR 115) HR: PKR 30 (Box: PKR 169.5)
Olys	TP: PKR 5 (Box: PKR 128) Offer of 2 Additional Packets	TP: PKR 5 (Box: PKR 144)
Jumbo Junior	TP: PKR 5 (Box: PKR 99)	TP: PKR 5 (Box: PKR 115)
Choc n Chip	TP: PKR 5 & SP: PKR 10 Box: PKR 129	TP: PKR 5 & SP: PKR 10 Box: PKR 144
Tooo Gud	MHR: PKR 20 (Box: PKR 99)	SP: PKR 10 & MHR: PKR 20 (Box: PKR 115) HR: PKR 30 (Box: PKR 169.5)
Goodies	SP: PKR 10 & MHR: PKR 20 (Box: PKR 102) HR: PKR 30 (Box: PKR 155)	SP: PKR 10 & MHR: PKR 20 (Box: PKR 115) HR: PKR 30 (Box: PKR 169.5)

Peanut	SP: PKR 10 & HR: PKR 20 Box: PKR 102	TP: PKR 5, SP: PKR 10 & HR: PKR 20 Box: PKR 115
Zeera	TP: PKR 5, SP: PKR 10 & HR: PKR 20 Box: PKR 99	TP: PKR 5, SP: PKR 10 & HR: PKR 20 Box: PKR 115

Clifton: Sales in the region are on a booking basis and from assigned company distributors. Most stores order biscuits every week, wherein order bookers from other brands visit once or twice a week. However, order bookers from Innovative Biscuits are not visiting stores regularly. Almost all the shopkeepers said that Digestive and butter crunch had quite some demand initially, especially when butter crunch was launched with many people asking for the biscuit; however, due to a lack of a proper supply chain and non-availability of order bookers, the brand could not sustain the buzz and the demand subdued with time.

Thus, the lack of regular visits has negatively impacted sales, as store owners are unaware of new products or promotions. A shopkeeper at a General Store in the Clifton area informed that the Innovative distributor had come to their shop to take an order. However, they declined, offering to stock the entire range of Innovative biscuits if the distributor paid a shelf rent of 5-6K. However, the distributor declined the offer, stating that they would get back to the shopkeeper, but did not respond.

Korangi: Order bookers of other companies visit weekly or twice a week. On the contrary, visits of order bookers of Innovative Biscuits were rare. Most of the stores were unaware of the brand's name and confirmed that the order bookers never visited to sell the products. Only one LMT, i.e., Babu Super Market, stocked Innovative Biscuits and expressed satisfaction with the service of sales staff and distribution service.

F.B Area: Half of the shopkeepers surveyed stated that there is a high demand for innovative biscuits, but none of the distribution team had visited their shops in the last two to three months. When the distribution team does visit, most shopkeepers prefer to buy from wholesalers or Imtiaz because the prices quoted by distributors are higher, resulting in lower profit margins.

Nazimabad & North Nazimabad: While a few general stores and bakeries carried Innovative Biscuits, the options were limited, and the stock was very low. It was observed that even the shops that carried Innovative Biscuits did not offer or inform customers about the brand due to their dissatisfaction with the company's delivery and order booking services. The order bookers would not show up for weeks, so Innovative Biscuits would not be displayed on the front shelf where customers could see them. In some shops, Innovative Biscuits Butter Crunch was only available, and the box was either on the floor or on the top shelf, making it hard to notice.

Some shopkeepers mentioned it had high demand when the Innovative Butter Crunch Biscuit was launched. However, issues with the order bookers taking orders on time resulted in declining sales of Innovative Biscuits.

Old City: Most of the shops in the Saddar area confirmed that the salesperson visited the morning of the exact day of the visit after 2-3 months. However, orders were not booked due to the history of rare visits. The shop owners stated that Innovative Biscuits' Digestive and Butter Crunch are in high demand in the market, but distributors do not visit their shops. They reported that these biscuits were regularly supplied 3-4 months ago, but the distributors stated

they were out of stock.

Some shop owners preferred purchasing biscuits from wholesalers or online apps due to the availability of good discounts rather than buying directly from the company on a booking basis, which does not provide any discounts. None of the shopkeepers seemed to be aware of the distributors' names.

Retailer Experiences and Preferences:

Gulshan-e-Iqbal: Trade margins varied from store to store but were in the range of 6% to 10%. Recently, Peek Freans has increased its margins by three rupees per box in a few stores. A trend in responses was seen in some retailers preferring LU for its trade margins, as it is one to two rupees higher than Peek Freans.

Trade Schemes also differ from store to store. Peek Freans ensure its visibility through shelf rents that range from PKR 1,500 to PKR 8000. This also includes rent for gondolas. LU also actively spends on display; however, its spending is still lower than Peek Freans and ranges from PKR 2000 to PKR 5000. As a company, Bisconni refrains from shelf rents in Gulshan Region and ensures stock levels through Personal Relations (PR) of order bookers. In an LMT "Needz Super Mart", Peek Freans and LU had separate standee Gandolas for Sooper, Rio, and Oreo. The companies were also found to be providing plus-one per box and volume target discounts to a few stores. In one store, "Yaseen Cold Drink", Peek Freans has tied discount criteria with shelf space, i.e., they offer a 3% discount on invoices against 60% shelf space in the store.

The biscuits category requires greater care from damage to prevent stock losses. Hence retailers also prefer to stock brands for which the exchange of damaged goods is quick. This is not the case for Innovative due to the unavailability of order bookers, wherein some stores reported throwing damaged goods because of lack of service.

Defense (DHA): On average, stores have a trade margin of 7% to 10%, i.e., PKR 2 to PKR 3 on individual packets and PKR 15 to PKR 18 on boxes. Margins are considered alongside shelf rent when keeping a particular brand on shelves. Many stores were found to consider demand as the first criterion for the choice of procurement, as the manager of Tee-Emm store put it. "If the volume is good, then we do not care about payment for visibility. But for a new company, a fixed visibility amount with additional discount is preferred".

Since quality is already reflected in higher customer demand, stores do not generally give much weight to quality when procuring. However, the quality and design of the SKU packaging do impact the procurement decision since stores have to make their shelves look presentable. Most GT stores procure cash transactions. Credit terms are important in procurement decisions for huge LMTs and IMTs, which prefer bill-to-bill terms. Different stores have different credit terms set with FMCG companies. A good supply chain profoundly impacts purchase decisions, and most established companies have very good distribution chains.

Clifton: Most retailers earn margins of around 10% to 12% on sales in the biscuit category. Since margins are competitive, most brands compensate by providing shelf rents ranging from store to store in the PKR 12,000 to PKR 25,000 range. Around 30% of stores had gondolas of Peek Freans as the primary display, whereas LU sponsored three general store name boards.

Both brands had shelf dockers installed in nearly all stores in the region.

Sales are on cash terms, which could be seen as a factor in limited company sales since shop owners might not have enough cash in hand to make large purchases of non-popular brands.

Korangi: In general, most shop owners make purchases through cash in the region, and the brands provide retail schemes like shelf rents, shelf dockers, banners, and gondolas to LMTs to differentiate themselves. In most kiriyana stores, biscuits are sold in the open and are procured in lesser quantities. Trade margins vary from 8% to 10% in the bakes goods category.

F.B Area: Companies do not generally provide trade discounts. Instead, they offer an alternative promotional strategy by providing an additional pack of biscuits (e.g., 12+1) to incentivise large quantity purchases. Additionally, all transactions are conducted on a cash basis, and orders are placed on a booking basis. Mayfair Café is widely available and offers the best profit margins.

Nazimabad & North Nazimabad: The shop owners confirmed the trade margins in the biscuits category to be very low. This is why they prefer to stock products from companies that offer shelf rents to compensate for lower margins. This is why they preferred Peak Freans and LU because of their retail engagement schemes.

Retailers also confirmed that while other brands have family packs across their product categories, Innovative Biscuits does not offer them. This is because Innovative Biscuits has focused on individual or smaller-sized packaging options, such as ticky packs and half rolls. However, these ticky packs were unavailable in the shops that stocked Innovative Biscuits in the Nazimabad region. The absence of ticky packs results in the customers looking for that specific packaging option to opt for alternative brands or product offerings.

Old City: It was discovered that EBM and CBL offer margins of 6-10% and have a strong presence in the market. Bisconni is also performing well. LU occasionally offers 2% discounts on 2 packets, and EBM is currently promoting 6+1 free (6 half-roll packs with 1 snack pack free). As a result, shopkeepers prefer to sell these biscuits because they are in high demand and offer discounts and promotions from the companies occasionally.

Consumer Preferences:

Gulshan-e-Iqbal: Customers in this region are accustomed to established brand names as they always look for specific brand products. As per the procurement manager of the Gulshan Super Store, "Even if Peak Freans or LU products are out of reach of the customers, they would ask store representatives to help them get the product." The demand for Innovative Biscuits, especially for Butter Crunch, was high when the company was spending on advertising.

Defense (DHA): When store managers were asked about the type of biscuits preferred by consumers, it was found that adults preferred plain biscuits while kids enjoyed creamy biscuits. Most running brands were Sooper, Milcolu, Rio, Prince, Zeera, and Cocomo. Most Customers prefer ticky packs or half rolls depending on their needs, followed by those who prefer Snack Packs. The store managers where Innovative Biscuits was available agreed that the brand has good taste but little awareness.

It was also found that the discontinuity of ticky packs has shifted consumer attention toward value packs like half rolls and snack packs. However, a few consumers still prefer to buy boxes of ticky packs because they are easier to eat and finish by kids.

Clifton: Most running brands in the Clifton region were Sooper, Prince, and Oreo. Most customers purchase half rolls; however, this also depends on the situation and mood of the customer. The store representative says, "If the customer is doing monthly grocery shopping, they are more prone to buying half roll for the entire family than in casual situations, where they prefer ticky pack for their kids."

Korangi: Most regional customers, like the retailers, were unaware of Innovative Biscuits. In terms of purchase appetite, most adults tend to buy family packs. Gluco, Prince, and Sooper were the region's most-running brands.

F.B Area: The region's most popular biscuit brands were Sooper, Prince, and Gluco. Adults in the region tend to prefer Sooper biscuits, leading to a higher demand for the brand's half rolls. On the other hand, kids favour Prince and Gluco biscuits, which are sold more in value or ticky packs.

Nazimabad & North Nazimabad: When asked about the biscuits given to customers, most shopkeepers said they give Gluco Biscuits. Housewives usually buy family pack biscuits like Peek Freans, while office-goers tend to buy half rolls to eat during tea breaks.

Old City: The most popular biscuits in the area were Glucco by EBM, Zeera Plus and Prince by CBL, and Cocomo and Novita by Bisconni. Consumers prefer larger packaging sizes for baked products when they purchase for home consumption but smaller packaging sizes for on-the-go consumption.

DISCUSSION

As per the primary and secondary research findings, Peek Freans is the most prominent brand in the consumer and retail segments. LU and Bisconni follow the brand in terms of market dominance. These three brands are known to pioneer their categories. For instance, Peek Freans has pioneered whole wheat biscuits, cream sandwiched biscuits, Sooper, and Butter Puff, whereas, Bisconni is known for pioneering Cocomo, Chcolato, Chocolate Chip Cookies, Novita, and Rite. Because of this first-mover advantage, these companies are reaping the benefits of the brand equity built over the years. Other brands, like MayFair, Cookania, and Gibs, are also rising.

One important factor to consider is that these companies have sister companies also manufacturing FMCG products. Thus, these companies benefit from shared resources and expertise, such as manufacturing facilities, logistics infrastructure, and distribution networks. This helps achieve economies of scale, reduce costs, and improve efficiencies. For Instance, Peek Freans' well-established supply chain and financial model enable it to off-board huge amounts of its inventory in stores. In many stores, huge amounts of inventory for Sooper were seen, which the company may have to lift in the coming month. However, it provides immense visibility and awareness to customers.

The order bookers of Innovative Biscuits are infrequent in their visits. On the other hand, Peek Freans, LU, and Bisconni ensure that their order bookers visit shops at least once a week. The distribution service of Peek Freans was considered to be premium by most shop owners and procurement managers. They also provide retail engagement schemes such as gondolas, banners and shelf dockers. In posh areas of DHA and Clifton, both LU and Peek Freans have sponsored shop boards of retailers and eateries like Café Clifton to boost brand visibility. Bisconni also partners with institutions. For instance, Floc Café has recently launched a new coffee that uses DayDream by Bisconni.

Regarding Pricing, price-sensitive consumers do not appear to be happy with the continuous price increases. These customers have switched to snack packs and half rolls from ticky packs in response to price hikes, but the switching rate between brands was rare. In terms of the biscuit category, taste, quality, and freshness are important factors considered by consumers, retailers, and also for some cafes and eateries that prefer to include the products in their recipes. In the consumer segment, prominent shelf space, consumer discounts and deals, packaging design and quality, the presence of sales representatives, and advertising can motivate people to switch from one brand to another. However, the brand's repurchase depends solely on the quality of the product.

In the retail segment, demand sheets, trade margins, and sales return schemes are the main purchase factors for retailers. However, repurchasing solely depends on the performance of the brand. A good supply chain, regarding availability and timely service, is also a major determinant. Only a few LMTs/IMTs work on bill-to-bill credit terms; however, GTs operates on a cash basis. Since most customers within this category do not seek their preferred brands at another store when the product is run out at one store, maintaining inventory levels is key to maintaining customer loyalty.

To sum up, the market surveys have revealed that there is almost no or very little presence of innovative biscuits in the visited areas. The brand has a high potential for expanding its business if they use effective distribution and marketing strategies.

CONCLUSION, LIMITATIONS AND RECOMMENDATIONS

Conclusion

The main purpose of the research was to analyse and compare strategies applied by Innovative Biscuits with industry competition in terms of distribution network and market positioning. The research aimed to recommend the company ways to boost sales. Currently, Innovative Biscuits lags in terms of Retail service terms of service by order bookers and Territory Sales Officers (TSOs) and customer awareness. This has resulted in a low market share. On the competitive horizon, Peek Freans, LU, and Bisconni seem to hold the market. The biggest threat comes from Peak Freans, which dominates half the market in terms of visibility due to sophisticated distribution channels, aggressive marketing strategies, and first-mover advantage in many categories.

The company can work on targeted product positioning, improve its distribution network, and spend on community building and social media for brand awareness. They need to educate customers on product features through different yet relevant channels. Innovative

brand offerings such as bundle discounts and retail partnerships can also help increase product reach.

Limitations

The research had a limited sample size and focused on a specific company and its immediate competitors in the Karachi region. The retailer perspectives, market dynamics, and consumer behaviours specific to the areas covered in Karachi limit the broader generalisation of the findings to other regions or sectors.

Some aspects of the confectionery industry's operations, market trends, or consumer behaviours that exhibit seasonal variations or longer-term trends could not be fully captured within the limited timeframe of four months.

A few retailers were unaware of all brands in the biscuits category or were sceptical about sharing data regarding trade costs, discounts, and sales due to confidentiality. Thus, the findings may not have captured the full spectrum of competition and consumer choices in the biscuits category, leading to a potential bias in the results.

Recommendations

Based on the findings of secondary and primary research, the following recommendations are made for Innovative Biscuits to increase its market share:

Increase Frequency of Visits: The first and most obvious solution is to increase the frequency of visits by order-bookers to the shops. This can be achieved by hiring more order bookers and allotting more people to particular regions. Optimising routes can reduce travel time and boost performance.

Improve communication: The order bookers may not visit shops frequently because they may not be aware of the demand for the company's products. By improving communication between the company and its order bookers, the company can ensure they know the product demand and prioritise their visits accordingly.

Provide incentives and Training: Innovative Biscuits can incentivise order bookers to visit shops more frequently. The company can ensure better sales performance by tying bonuses or commissions based on sales volume and providing rewards for achieving specific targets. Further, order bookers may not visit shops frequently because they lack the necessary skills and knowledge. By providing training and workshops on company products, effective sales techniques, customer service, and time management, the company can help order bookers to be more effective in their roles.

Utilise the existing technology at its full potential: Innovative Biscuits has an existing system in place for optimising orders. The company can use the same to optimise the visits of order bookers. For example, they can use data analytics to identify high-demand areas and prioritise and plan visits accordingly.

Availability: By addressing the issue of infrequent visits by order bookers, the company can ensure that its products are readily available in the market, which can lead to increased sales and customer satisfaction. Other than that, it is important to note that the company's

products are available in markets that are dealt with by M.S. Distributors. It is because, in LMTs, distributors are their key communication channel. Direct distributors maintain all brand product ranges, which adds convenience to the procurement process, wherein if any supply chain issue arises, the distributor can resolve the same. Considering the same, Innovative Biscuits can improvise its distribution system by onboarding big names such as Burque Distributors, United Distributors Limited (UDL), or NPD.

The effective distribution also requires efficient inventory management. Companies should clearly understand the demand for their products and work closely with their distributors to ensure they are available at the right time and in the right quantities.

Monitor the Distribution Network: Many shopkeepers, including a wholesaler, confirmed purchasing the company's products from other than the company's distribution chain. It is important to monitor such activity because the availability of products at lower than the company prices from third-party sources can result in reduced revenue, harm to the company's brand reputation, and lack of control over product distribution and marketing. The company should investigate the matter and take corrective measures to prevent such activities from occurring in the future.

Flexible Terms with Retailers: Since Innovative Biscuits is still in the process of setting foot in Karachi, the management needs to be flexible in setting terms with retailers. Trade schemes such as shelf rents, shelf dockers, banners, and gondolas greatly impact visibility and sales. To entice retailers to keep the company products, the company may consider reducing margins and providing shelf rents instead. This will incentivise the retailers to highlight the brand more in the aisles.

In IMT stores like Imtiaz, new brands are offered space in the standalone POP display, which Innovative Biscuits can capitalise on. The brand can build long-lasting PR by sponsoring a store's name-board or placing paid ads outside LMT stores. The presence of sales representatives in LMTs to push potential consumers for trials with free samples can also increase customer awareness. For instance, Bisconni sent their representatives to stores like Carrefour with free samples when DayDream was launched. It is also important to ensure that the stores follow the brand's proper planogram.

Consumer-centred offers: Discounts and bundle offers impact consumer buying decisions. Instead of keeping prices lower than the rest of the market, Innovative Biscuits should focus on providing bundle discounts like "buy 2 get 1 free" to entice customers to try the products. The discounts must be relevant to all segments to gain market share and create brand awareness. For instance, Bisconni launched an offer of a free Cocomo pack with a box of Nice Biscuits in Ramadan to entice customers to try the products. Innovative can also give packs of its running products like Butter Crunch with less popular brands to increase awareness.

Selective Placement: Innovative Biscuits' distribution channels currently cater to nine zones in Karachi. Instead, the company should focus its distribution strategy on stores in high-income areas like DHA, Clifton, and Gulshan, with potential product demand. The brand can target newly established stores, alongside a few big stores, in such areas, providing the required exposure and the opportunity for better negotiation. Since their Butter Crunch and Digestive SKUs are the most prominent among other SKUs they should place more inventory of these

SKUs in stores to penetrate the market. Later they can increase their presence in different stores with more products.

Apart from Physical stores, online presence in e-commerce platforms is key to gauging the rising trend of online shopping. Having a very good supply chain and inventory management is vital for sustaining the initial phase of positioning and creating a strong footprint in the industry.

Other than focusing on distribution strategies, in particular, a few marketing recommendations are given as under:

Marketing Strategy: Innovative Biscuits must give special attention to brand awareness and product positioning through marketing strategies. Other brands like Bisconni, EBM, and CBL spend heavily on TV advertisements. Since TV advertisements are expensive, the brand can also focus on building its presence across digital media campaigns, mainly on Facebook, Instagram, Tiktok, and YouTube. Engaging SEO and SEM content that contains fun and functional elements can help the company connect with its target market and create a recall in the minds of its potential customers. Since the key consumers of the biscuits category are children, ads and posts that use special or animated characters can help grab attention.

The company can also use online platforms to interact with its customers, get feedback, offer promotions, and build loyalty.

Product and Packaging Design: Companies increasingly use animated characters to grab kids' attention. A few examples are Cocomo, Chocolate Chip Cookie, Hello Panda, etc. To convert attention into a purchase decision, the brand must incorporate this element in its packaging to make it stand out in store aisles.

The company should also focus on product differentiation to stand out in the highly competitive market. The company has a wide variety of products, but they all are similar to the competition's products with only price differences. The company can leverage its state-of-the-art facilities and natural ingredients to produce high-quality, healthy products that meet consumers' changing preferences and demands. They can also launch new products and flavours catering to specific occasions, seasons, or festivals.

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APPENDIX

Questionnaire for In-Depth Interviews

General Information

Name of Outlet: _____

Area: _____

Name of Interviewee: _____

Channel of Distribution

- 1 *Are the products of Innovative Biscuits easily and timely available?*
- 2 *How frequently do you procure the company's products?*
- 3 *What is the source of procurement for baked FMCG products? (wholesaler or company distributor)*
- 4 *If you purchase from the wholesaler, is it because there is a significant price differential?*

Comment: Only if you purchase from a company distributor. (Answer the following)

- 1 How often does the order booker visit and how does he conduct business?
- 2 How often do company executives visit your shop?
- 3 Are the company sales on a booking basis or on a spot basis?
- 4 Do you receive any trade schemes or offers? If yes, what is the criteria?
- 5 What are the payment credit terms you are offered by the company?
- 6 How do you replace damaged & expired products?
- 7 Are you satisfied with the service the distribution?
- 8 * Yes * No
- 9 Could you provide a range of margins provided to you by FMCGs in the baked goods category?
- 10 Can you track the price hikes in the overall industry during the previous year

Retailer Preference

- 1 Suppose a customer comes to you to ask about biscuits but does not specify a specific brand. Which brand of biscuits would you sell him? Please specify.
- 2 Which brand do you prefer to place on the front of the shelf? Is it because it has the highest demand or does the brand pays more for shelf space? Which company offers the best retail engagement program?
- 3 Product Visibility of Innovative Biscuits

No. Of Facings	Primary Display	Secondary Display
Digestive		
Butter Crunch		
OLYS		
Jumbo		
Frisky Cream Wafers		
Frisky Rolls		
Choc n Chip		
Crust Choco Rolls		
Crust Creamy Wafers		
Too Gud		
Goodies		
Peanut		
Zeera		
Snapp		

- 4 Shelf Placement of Brands (Support with Pictorial Evidence)
 - a. What are the shelf shares of each of these brands?

	Innovative	EBM	CBL	Bisconni	Other Brands
Count on Shelf					

- b. How much backroom storage is allocated to each of these brands?

	Innovative	EBM	CBL	Bisconni	Other Brands
Back Store Quantity					

5 Number of displays (touch points) – trade tools like POS, Gandola, etc.

	Innovative	EBM	CBL	Bisconni	Other Brands
Back Store Quantity					

Consumer Preference

- 1 What is the most running SKU type in the baked goods category? (Sweet, Savory, Cookie, etc.)
- 2 What is the most running SKU size in the baked goods category?
* Ticky-Pack * Party Pack * Snack Pack * Family Size
- 3 Do you think that the discontinuity of ticky-pack packaging by the FMCG brands has impacted their sales?
- 4 How often do consumers purchase biscuits?
- 5 What price range do customers typically look for when purchasing the bakes goods category?
- 6 What brand of biscuits sells most?

	Innovative	EBM	CBL	Bisconni	Other Brands
Average monthly sales of brand					
Average monthly sales of category					

- 7 What are the most running products of Innovative Biscuits?

Detail of shops visited for In-Depth Interview

Defense (DHA):

Area-Wise Breakup (20 Stores)		
DHA Phase 1		
Al-Chemist Pharmacy & General Store	Sahil Super Store	
DHA Phase 2 and Phase 2 Ext		
Al-Madina General store	7 Eleven Store	Step In & General Store
Sunny Bhai & General Store	Sunny Medico	
DHA Phase 6		
Quetta Darwesh Store	Nice Super Store ((LMT)	SubhanAllah General Store
Fine French Bakery		
DHA Phase 8		
Intiaz - The Place (LMT)	Creek Mart (LMT)	Tee Em (LMT)
Khayaban-e-Badar		
Babar Super Store	Subhan Pharmacy and Super Store	Sada Bahar Milk Shop (Mom & Pop)
Pepi's Chemist & Super Store	Marvi Medical and Super Store	
Sea View Road		
Carrefour - DMC (IMT)		

Clifton:

Area-Wise Breakup (16 Stores)		
Clifton		
Shahani Super Mart	G-Mart	Al-Hafiz General Store
Quetta Super Store	Mahaveer Store	Sarmad Mini Mart
Mottas	Al-Hafiz General Store	Aghaz Super Mart
Diamond Mart	My Cannes Mart	Prince Mart
All in One Super Mart	Shop and Save	S.S.D Medical Store
Shahani Super Mart		

Gulshan-e-Iqbal:

Area-Wise Breakup (20 Stores)		
Gulshan Block 13/A		
Jilani Medical and General Store	Golden General Store	Ahmed Milk and Juice Center (Mom & Pop)
AlBadar Medico and General Store	Ahmed General Store	JK Store
Marhaba Medical and General Store		
Gulshan Block 13/D		
Star Medical and General Store	Alnoor medical and general store	Gulshan Super Store (LMT)
Hollywood Bakers and Nimco	Rehman General Store	4M
Gulshan Block 13/C		
Yaseen Cold Drink	Momin Rice Superstore	Rite Medico
Bismillah Wholesale Store (Wholesale)		
Stadium Road		
Mehran Medical and General Store	Sunny Medico and General Store	Needs Super Market (LMT)

Korangi:

Area-Wise Breakup (8 Stores)		
Korangi		
Babu Super Market (LMT)	Riaz Milk Shop (Mom & Pop)	Karachi Azaan Bakery
Amaan General Store	Adnan Brothers General Store	Manahil General Store
Nadir General Store	Rao Salman General Store	Imtiaz Super Market (LMT)

F.B Area:

Area-Wise Breakup (30 Stores)		
FB Area		
Ilyas General Store	Hanif General & Cold Store	Al Noor Cold & General Store
Prince Store	Baby Play Land	Saad Pan Shop
Panjwani Confectionery	Sooper General Store	Lucky Pioneer
Bismillah General Store	Pasta General Store	M.Arif
Mehran Bakery	Usaid Pan Shop	Abdul Rasheed General Store
Pak Medico	Zia Store	Hashmi General Store

Lucky Pioneer	Ghizer General Store	Adam Pan Shop
Rabia Medical & General Store	Noori Pan Shop	GB Brothers General Store
Nazeer Bakery & General Store	Rehman Bakery	Iqbal Kiryana Store
Attari General Store	Ammol Store	Diamond Super Store

Nazimabad & North Nazimabad:

Area-Wise Breakup (30 Stores)		
Block H, F & Fivestar		
Al Dawood Mart	AM PM Mart	JZ Medicos
Jannat Mart	Super Medicos	Al Safa Medical store
Paracha General store	Jilani Store	Hadi General Store
Spar (IMT)	Pakeeza Store	Hasan Qureshi General Store
Block I		
Day to Day Bakers	Minto General Store	Salman Bakery
Taimuriya General store	Al Karim super market	Amir General Store
Hyderi Market		
Bismillah Medical & General Store	Kay Bakers	Zain general store
Souq Al Haram	Friends Mart	Safia Market
Nazimabad		
Abbas Hussain bakery	Goodluck General store	Kifayah Super Market (LMT)

Old City:

Area-Wise Breakup (22 Stores)		
Saddar Market		
Moonlight Store	Deal In General Store	Memon Mini Mart
Al-Rehman	Diamond Bakery	Royal Mini Mart
Bright Medical & General Store		
Jamshed Road		
Minhal Express	Madina General Store	Sagar Snacks & Bakers
Bismillah Milk Shop	Marhaba Bakery & Mart	Al-Rehman Store
PIB Colony		
Panjwani Medical & General Store	Jamal Bakers	Hafiz Bakers
Gaadi Khata Road		
Dam Dastagi	Awami Store	Mastan Shah Mart
M. Batay	Ashraf Store	Ambani Store