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COULD BE ONLINE GROCERIES AN ALTERNATIVE FOR ROMANIAN FOOD RETAIL?

Case study

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Abstract

The new technologies, competition, consumer convenience and the lack of time for shopping are some factors that have encouraged the Romanian online retail food market. On the food market identifying the viable direction of development and business continuity represents a major concern for economic operators. For a new business online commerce is the most affordable and the fastest way to enter the market. The domestic online retail food market is estimated to reach 6 million euros in 2014. Studies carried out by specialized companies have identified the Romanian consumers' appetite for food shopping on the Internet. Although Romania is only at the beginning in online food market as compared to its European neighbours, experiments in other domestic sectors demonstrate the possibility of surprises in this domain. The article proposes a short analysis of the Romanian online food retail market, tendencies and opportunities in this new domain for local commerce.

Introduction

Online commerce has lately known huge expansion, favoured by the computer system development, the Internet network globalisation and the great number of consumers willing to resort to modern commerce methods. European e-commerce has growth year by year. In the European top of online business, shown in figure 1, are Ireland, Czech Republic and Iceland. Romania is the 25'Th position in the EU 28 top (European Union, 2014).The development of the mobile phone systems and of smartphones, the proper banking services, the availability of consumers for online transactions as well as the appearance of some online food retailers favoured the development of new concepts for food retail. Mobility, e-commerce and business analyses may represent economic growth engines specific to contemporary economy (Nita, 2014). According to Shaea and Zivic (2003), the products that are sold online are the ones that are intensely publicised, that do not need to be tested when purchased and that have low weight. Therefore, the delivery costs do not substantially reduce the profit margin. Research into client motivation for online purchase to the detriment of traditional stores identified as decisive variables: the price, ambiance, convenience, service and product variety (Kempiak and Fox, 2002). The competition manifested on the online market led to a significant fall in shopping prices, turning this kind of shopping system attractive for buyers. Thus, a study carried out by Fowler (2014) comparatively analyses the prices paid for a set of 14 food products purchased online or in traditional stores in 6 American cities, the conclusions being favourable to online commerce. The main problems with which online American shoppers have to deal are site access ease and purchased product delivery speed.

The achievement of some success models for online food commerce is difficult because not all merchants have experience in identifying real consumer needs (Seitz, 2013). Denmann (2014) performs an analysis of the strategies used by merchants on the American online food market (Denmann, 2014a), achieving a ranking of the most efficient players in the domain (Denmann, 2014b). The differentiation criteria were user experience, personalization, content and features, selection, delivery and pick-up options and mobile site/app. The sores ranged from 1 to 5. The first position was occupied by Fresh direct, with a weighted average score of 4.14 points, followed by Google Shopping ExpresssSafeways, with 3.42 points, Amazon Fresh, 3.14 points and Peapod, 2.85 points (Fowler, 2014).

The use of some niche markets can facilitate the marketing of some food products such as olive oil (Carlucci, De Gennaro, Roselli, and Seccia, 2014), products destined to a certain diet, organic products or dietary supplements. Online food product marketing can offer a competitive advantage to the big retail chains (Burt and Sparks, 2003), although the success of the business depends on the market potential and on the distribution costs (Van der Laan, 2014). In 2013, as compared to the Czech Republic or to Poland, online commerce in Romania was relatively low, only 5.6% of the households purchasing online products (Rosca, 2014). According to Euromonitor studies, quoted by Petcana (2014 a), the main online marketed goods are electronic products and video games (sales estimated at 484.2 million lei in 2014, increasing by 12.6% as compared to 2013), followed by furniture, decorations and home accessories (sales estimated at 212 million lei, increasing by 15% as compared to the previous year), media products (sales estimated at 202 million lei in 2014, increasing by 22.9%), clothes and shoes (online sales of 179.1 million lei, increasing by 10% as compared to 2013). For 2014 a food online commerce increase of 13% is expected as compared to last year and a sales value of 6 million euro, representing 1.5% of the total online commerce with payment made by means of credit card. The total online sales value is probably higher, taking into consideration the fact that a lot of clients pay in cash the products delivered at home. Nevertheless, the Euromonitor forecasts herald a relatively slow development of the local sector for 2013 – 2014, the great majority of Romanian consumers still preferring to purchase food products from traditional stores. Although forecasts are reserved, commerce development in Romania has in the last few years offered surprises both from the point of view of expansion and of the sales techniques. Thus, unforeseeable evolutions of the online sector are possible.

Materials and methods

The data used in this article are statistical information presented by specialized national, European or global institutions or information presented in the media, journals and food industry treatises/dissertations. All statistical data collected was rewritten into the tables and analysed. There have been used data series regarding sales volume, point-of-sale number, the profit rate. The purpose of the statistics was to show changes in the size and value of the total online groceries.

Results and discussions

Food retailer international networks and the online product offer in Romania

The strategy used by the big retailers on mature markets from Europe may constitute a model for online food commerce development in Romania, taking into consideration the fact that many commercial techniques from the local market were previously successfully tested in the Western countries. Great Britain, France, Germany and the Netherlands (Europe) or the United States of America are areas in which online commerce has registered an important development, including in the food product sector, a similar evolution being possible in Romania, too. The analysis, carried out by IGD Shopping Vista, quoted by Scott -Thomas (2013), highlights an exponential increase of the online product sales in the 4 analysed countries – Great Britain, France, Germany and the Netherlands (Figure 2). The Swiss online product market, which is comparable to that of the Netherlands in 2012, will register a moderate growth until 2016, reaching sales of 1.1 billion euros, as compared to 1.6 billion euros in the Netherlands. In 2012, the greatest sales of online products in Europe were in the UK, with over 7 billion euros, the main categories of products sold being those for children. The click and collect system, applied in France, has a significant share in the 5 billion euros registered in online sales, the growth registered on the German market being mainly due to important investment made by Edeka and Rewe (Figure 1, Figure 2).

The main European retailers have already developed online commerce divisions, having a more and more important share in the influx total. Ionescu (2013) carries out an analysis of European online food commerce networks, reviewing the main strategies applied by the big retailers. Thus, Tesco PLC, a British company with 6.700 stores in 12 countries, reported revenues of over 72 billion £ in the fiscal year 2012/2013, out of which the e-commerce sector (by means of the Tesco.com platform and the Click and Collect service) generated sales of over 2 billion £ (Tesco, 2014). Tesco, the first FMCG retailer with an online division (1997) holds over 50% of the online food sales from the UK. The central platform Tesco.com, launched in 2000, is one of the most attended online commerce sites in Great Britain, having approximately 1 million shoppers who regularly order over 1 billion products. The use of the platform is simple, the shopping is accessible and easy to do. For example, Tesco groceries, available at http://www.tesco.com/groceries, provides the client specific ranges classified by categories (fresh food, bakery, food cupboard, frozen food, drinks, baby), as well as other products specific to groceries (health & beauty, pets, households, home&events)(Tesco, 2014). The detailing continues with a tree-like classification up to the item level. There is a series of differentiated promotions, categories of clients and the moment of purchase. The online store has the Click & Collect services, a drive-like concept, with 1,500 collection points in Great Britain and the Drive-thru system, with 150 points exclusively for grocery products. Tesco also operates online in the Czech Republic (from 2012), Slovakia, Ireland, Poland, South Korea, Thailand or Malaysia, in parallel with the traditional point-of-sales. For 2014 the group aims at developing the online segment and the Turkish market. The online offer comprises about 20.000 food products (fresh, frozen products and grocery products) with delivery in a minimum of 2 hours from placing the order. As an innovative sales strategy, Tesco launched in Seul, South Korea (2011) the first virtual store placed outside a shopping location, with digital panels that display food products, in particular, which are also available in the own Home Plus network. The purchase is made by means of a mobile phone, the delivery is made at home in a time frame chosen when the order is placed. This concept was expanded on the British market, too in 2012 by means of the Gatwick airport virtual store launch, which offers 80 of the best sold products from the Tesco networks. The company aims at doubling the revenues made online in the next 5 years and at consolidating the e-commerce business on the home market on the basis of 1 billion £ investments (Ionescu, 2013).Tesco is not present with traditional stores on the Romanian market.

The French retailer, Carrefour, the second global retailer, has developed three online commerce platforms on the home market and a smartphone application for direct shopping. The main portal, Carrefour.fr offers approximately 15,000 items classified by categories (wines, toys, home appliances, TVs, mobile phones, home and do-it-yourself products, linen and jewellery) – Carrefour, 2014 According to the site of the company, the portal, which includes links that send directly to the own online commerce platforms Ooshop.com and Carrefour Drive, is visited by approximately 5.5 million customers monthly. The online shop Ooshop.com offers approximately 8,000 FMCG products, classified in different categories (fruits and vegetables, dairy products, butchery products, grocery products, frozen products, breakfast products, drinks, baby, bio, care products, home items, pets). The minimum order is 60 euros, the delivery charge being of 0 – 11 euros, depending on the size of the order (Carlucci et al., 2014) The customers can benefit from the discounts applied directly to products or from specific promotions. In Spain, Ooshop markets approximately 14,000 products available in supermarkets, too, and the delivery covers 80% of the country's territory (Carrefour, 2014; Ionescu, 2013)

The drive-in service developed in France (Carrefour drive) presupposes buying the products online at identical prices to those from supermarkets, the delivery being made at the 200 existent collection points. The platform offers approximately 7,000 references classified in 14 categories, without minimum order. Over 15% of the French households did the shopping by means of this service at least once a year. The company intends to implement and develop this service in Belgium, Spain or other countries in which there is demand. Since 2013, this service is also available in Romania. The service can be accessed at http://www.carrefour-online.ro.There are 12 product categories available, 7 of which are food products. There is no limited sum of money for the purchase, the delivery is made at home and is free in Bucharest for shopping that exceed 300 RON. The Carrefour drive system is not available in Romania (Carrefour, 2014).

The Auchan group, the second French group and the tenth in the world, holds from 2011 an e-commerce division, applying a multi-channel strategy. The purpose of the network, according to the statement, is to offer multiple solutions to shop (in the supermarket, on the Internet, with home delivery or in the parking) (Auchan, 2014). The online network presently comprises Auchandirect, Auchan.fr, Auchan Drive, Chronodrive and GrosBill (destined to household products). The Auchan.fr platform offers food and non-food products, catering services, without the need for a minimum order. The customer can opt for home delivery (through an appointment, by a courier service) or for picking up the order from one of the 120 Auchan hypermarkets or from one of the 4,300 collection points. The delivery charges, between 3 and 20 euros, vary depending on the order type and the chosen delivery method. The online store Auchandirect, opened in 2001, markets approximately 7,000 food or non-food products, classified in categories (promotions, new products, fruits and vegetables, dairy products, butcher products etc.). The delivery, for a minimum order of 60 euros and a delivery charge of 3 euros, covers a number of cities or adjacent areas (Paris, Lille, Lyon, Marseille, Toulouse, and Warsaw) (Ionescu, 2013). Auchan Drive (opened in 2000) is a concept situated between online commerce and traditional shopping, having over 6,000 products available. The customers place the order online, the sopping being picked up from the hypermarket, without any additional charges. SimplyMarket, the own supermarket division, also has an online offer, with over 10,000 references. The minimum order is of 60 euros, the delivery charges varying from 5.9 to 9.9 euros depending on the hour when the order is placed. Chronodrive, opened in 2004, a project which is similar to Auchan Drive, also operates outside shopping centres, being developed in partnership with E. Leclerc. The available offer comprises approximately 7,500 products from the food product category (fresh, frozen, food, drinks) or non-food (body care or products for babies), which are cheaper than in the supermarket. The delivery is made at home (for a fee between 15 and 20 euros) or can be picked up from the delivery points in approximately 2 hours from placing the order. The group does not offer online services for Romanian customers (Auchan, 2014).

The Belgian group Delhaize developed a variety of online stores on its home market (Delhaize Group, 2014). The DelhaizeDirect.be online platform (re-launched in 2012) allows shopping that may be subsequently picked up from the network collection points (over 118 stores in Belgium). The platform has an associatedsmartphone application with multiple functions, including scanning the products for the online order. Delhaizewineworld.com, a specialised store with a collection of approximately 1,300 wines from all over the world, offers products that are not available in supermarkets (the best sold wines on a global level, rare wines or wines from well-known areas). The products may be delivered at home or can be pickedup in the 400 Delhaize selling points, AD Delhaize, Proxy Delhaize or City Delhaize, The Caddyhome.be concept offers customers accessibility to the products present on the Delhaize supermarket shelves by means of multiple booking variants online, on the phone or fax. The delivery can be made at home or at selling points. The Delhaize Direct-Cube virtual store, with an offer of over 300 items, was opened in the central station in Brussels to promote DelhaizeDirect (Delhaize Group, 2014;Ionescu, 2013). The Houra.fr (opened in 2000) drive-in division, which operates in France, offers approximately 50,000 food and non-food products, classified in categories. The minimum order is between 60 and 70 euros, depending on the delivery areas (capital city or province), and the delivery fee starts from 9.9 euros, depending on the quantity and on order frequency. In the drive-in category, Cora launched Coradrive.fr in 2010 and Houra Drive, meant specifically for the French market. The commercial offer comprises between 13,000 and 20,000 food and non-food products, marketed on the principle of picking up the order form the store. The investment of the company in online stores is of 150,000 and 200,000 euros. The present share of Cora drive sales is 3% of a Cora hypermarket turnover, a percentage of 4% being enough in order to ensure lucrativeness(Delhaize Group, 2014). Since 2013 Cora drive operates on the Romanian market, too, by means of the coradrive concept available on http://www.coradrive.ro. The online platform offers shopping categories (offers, fresh food, groceries, gourmet, drinks, health&beauty, home, products for babies, petshop and tobacco). The prices are identical to the ones from stores, with no additional costs for preparation, the time frame within which the customer can pick up the order being indicated depending on the time he placed the order. The retailer offers special promotions for the Coradrive customers(Delhaize Group, 2014).

Since August 2014, in cooperation with the online network e-MAG, the Mega Image supermarket network, part of the Delhaize group, inaugurated the first online store, available on http://www.emag.ro/supermarket. The offer, containingmainly food products, is represented by 7,500 products, classified in 10 categories (vegetables and fruits, dairy products and eggs, meat and sausages, frozen products, grocery and bakery products, drinks and alcohol, bio-eco products, care and personal hygiene, home and pet care). The purchases can be delivered by courier or picked up from the Mega Image stores (Ilie, 2014).

The German retail group, Metro, developed online sales platforms by means of the Metro Cash & Carry online delivery service (opened in 2009), present in almost all the countries in which the company operates. The online platform meant for the Metro Office Direct companies (since 2012 in Romania) offers approximately 6,500 non-food products (Metro Cash&Carry, 2014). In the Netherlands or Russia, the retailer also markets food products by means of a similar platform. In 2011, Metro Cash & Carry launched in Germany, in partnership with Weinvorteil, metro-wein.de., an online store dedicated to wines. In 2013 the store was given to the partner Weinvorteil. Since 2010, the company offers clients from Germany, France and Great Britain approximately 40,000 products in the drive in concept, accessible online or on the phone, which can be picked up at the collection points. Real, the Metro Group hypermarket division, operates by means of drive-in in Germany in two Real Drive locations, opened at la Isernhagen, Hanovra (opened in 2010) and Koln-Porz (opened in 2011). The customers can choose from 5,000 products, food (fresh and frozen) or household.The online store, available for Romanian customers who are legal entities, is available on http://www.metro.ro/shop/ro/office. In order to access the offer one needs to register as Metro partner(Metro Cash&Carry, 2014).

The Rewe group launched in the Rhine-Main region, Germany, opened in 2011 three online Rewe locations, with an offer of over 8,500 food products. The orders can be made online, the delivery being available at the customer's home or at a Rewe supermarket. The online network is not available in Romania.

The Billa supermarket division offers the possibility to purchase online on the foreign market, at a minimum order of 25 euros, with payment on delivery and transport fees dependant on product weight. In Romania, the retailer does not have the customer online service (Billa, 2014).

The companies Kaufland and Lidl (Schwarz Group) did not develop their online division very much, but they intend to develop this segment in the following years. The only existent online application is lidl-shop.de, which offers the possibility to order online for a 3.95 euros delivery fee. The online network is not available in Romania, on the site of the retailer, http://www.lidl.ro/ro/prezentari-produse.htm, existing only an online presentation of the available industrial product usage, without the possibility of purchase (Ionescu, 2013; Kaufland, 2014; Lidl, 2014).

The Selgros cash & carry hypermarket network, part of the Swiss group TransGourmet Holding SE, with 19 stores opened in Romania, entered online commerce by means of a partnership with the MegaMarket.ro supply service platform, thus delivering over 11,000 food and non-food products to customers. The products available on MegaMarket.ro are from the following categories: grocery, fresh food, bakery, drinks, baby care, home and office, personal care, pet shop and stationery. This range is going to be extended to household and kitchen products, home and garden, electronics and toys. The products can be ordered on the website or by means of the application available in Google Play and App Store and can be delivered directly to buyers, in 24 hours, the transport being free for an order of minimum 200 lei (Petcana, 2014b).

The offers of the few local companies promoted online have products that are not correlated with market prices and cannot deal with specialised retailer competition. For example, the offer of the online order company T&H Company (set up in 2012) presents a range of products made up of 9 food products, the prices being higher than the offers from traditional stores or from the online supermarket networks (T&H Company, 2014).

Conclusions

Online food retail commerce makes the first steps on the Romanian market. The year 2010 represents the moment when the first food retail stores appeared on the local online market. Among the international retailers present on the local market, analysed in 2013, only Carrefour and Delhaize (by means of the Cora network) developed online commerce for the segment B2C, whereas the Metro Cash & Carry group presents an online B2B commerce platform for legal entities. The year 2014 brought about two new players on the online food retail market, achieved by means of partnerships with online commercial networks (MegaImage–eMAG and Selgros-MegaMarket). As compared to the mature markets in Europe or the United States, the Romanian online retail has a low share of the total food commerce. The multinational store networks that dominate the local food retail market focused on the development of traditional store networks, paying little attention to the online sector. Competition growth on the Romanian market, limited in point of demographic potential and a consumer segment flexibility, adaptable to modern commerce methods, will probably lead to a diversification of the sales strategies from the part of the economic agents from the domain and to the appearance of more online food retail stores.

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Appendix.

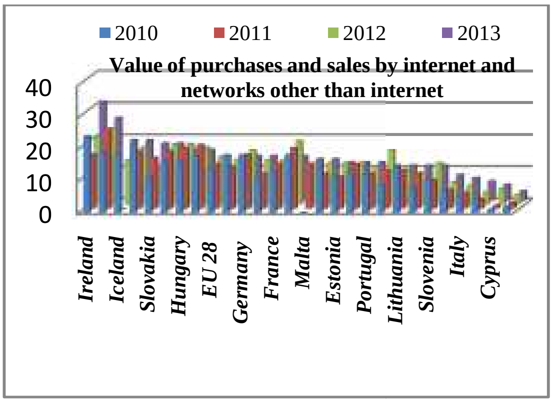

Figure No 1 2010-2013 Online food retail in E 28 (European Union, 2014]

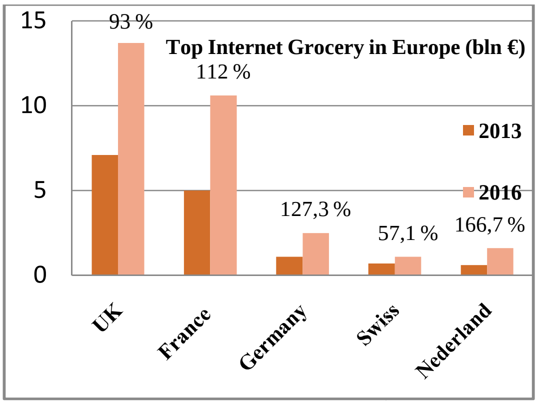

Figure No 2Top Internet Grocery in Europe (Scott Thomas, 2013)