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## Impact of modern retail outlets on traditional retailers: An economic analysis

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### Abstract

The vegetable retail sector has undergone significant changes in the past few years. The retail sector in India is witnessing a huge variation as modern retail markets such as departmental stores, supermarkets, hypermarkets etc. which provide good shopping experience. This development also increased public interest to shop at the modern market because of the opinion that these markets are neat, clean and practical than traditional retail. This has become a big challenge for traditional retailers. With this view, this study intended to measure the impact of modern retail outlets on the traditional retailer's using in depth survey method with the help of the structured and systematic questionnaire. The findings of the study revealed that the impact of emergence of modern retail outlets on traditional retailers were decline in sales, reduction in volume of profits, low customer retention and increased operation cost. The reason for decline in sales of traditional retail outlets were increased competition, emergence of online delivery and shifting of consumers towards modern retail outlet. Total physical loss in monetary terms was found to be highest for modern retail outlets than traditional retail outlet due to high prices. The absence of storage and grading facility, higher wastage and failing in assessment of demand were the major constraints faced by the traditional retailers whereas constraints faced by modern retailers were supply default, absence of uniform quality and unsold produce. Despite of all these constraints, traditional retailers can overcome these challenges by emphasizing on quality sourcing of varieties of vegetables, polite behaviour with customers, accepting online payments, correct measurement of weights, home deliveries and cleanliness in the premises, packaging facility and community ties can help differentiate them from modern retailers

**Keywords:** Modern retailers, traditional retailers, fresh vegetables

### 1. Introduction

Vegetables are critical to a person's general well-being since they provide necessary vitamins, minerals, dietary fibre and phytochemicals, as well as lowering risk of contracting harmful illnesses and other ailments. Given the nation's diverse agro-climatic circumstances, it is possible to produce wide varieties of fruits and vegetables. Vegetables help to ensure individuals to have good health and nourishment. The sector's focused concentration on research and breeding programmes has significantly altered the production and accessibility of vegetables. After China, India is the world's second-largest producer of vegetables (90.8 million tonnes), accounting for 14.45 percent of global production during 2021-22 (FAO, 2021).

Marketing of vegetables is not a new activity; however, over a period of time, marketing practices have changed dramatically, to keep up with the ever changing behavioural preferences of consumers. Though fresh vegetable retail has been considered as a very low margin business, the market potential has attracted Indian business and corporate houses, driving the forays through different models like single-format, multi-format or integrated urban-rural model

India, with its diverse cultural heritage and vast agricultural landscape, has traditionally relied on a network of small-scale vegetable retailers to supply fresh produce to its population. These traditional retailers, often operating in local markets or street-side stalls, have been an integral part of India's retail ecosystem for generations. However, over the past few decades, the retail landscape has witnessed a significant transformation with the rise of modern supermarkets and hypermarkets.

Indian food retail consists of staple commodities comprising grains, pulses, and vegetables. The Indian food retail business, especially vegetable retailing is witnessing a rapid growth in India's organised retail sectors. The traditional retailing of vegetables is not much organized, amounting to 97 percent of the total market.

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Additionally, it is very fragmented, highly localised, and has numerous intermediates. Traditional merchants with a variety of outlet forms, including mom-and-pop stores, temporary market stalls, street vendors, push-cart vegetable sellers, wholesale traders, commission brokers, and auctioneers, act as mediators between consumers and farmers. The farmers themselves may sell their produce to intermediaries or agents and organised retailers or they sell it directly to end consumers. The majority of farm products are sold to brokers and auctioneers.

Due to the rising demand for high-quality food in urban areas as well as the better prices that the retail chains are providing to farmers, contemporary food retail chains are becoming more powerful in India. Farmers are drawn to the contemporary retail chains where product is bought through procurement centres because of the higher prices given. Farmers are now putting more emphasis on quality and strive to create higher-quality goods so they may get higher prices. This is a better market where farmers are better off and food quality is increased, making the market competitive and benefiting society by reducing resource use from low-quality produce. So, this becomes a greater motive for the farmers to sell their produce through modern retail chains. However, there is also a drawback of rejection of low quality produce in these retail chains, where it becomes difficult for the farmers to sell off the left out produce. But, given that maintaining the quality will always fetch higher prices. The above facts indicates the incentivising farmers and help gain through the choice of channel.

Modern supermarkets, backed by foreign direct investment and domestic players, have emerged as formidable competitors to the traditional vegetable retailers. These supermarkets offer a one-stop shopping experience, complete with air-conditioned walkways, a wide variety of products, and convenient locations. They have managed to attract a substantial portion of the urban and semi-urban consumer base, luring them away from the traditional marketplaces. Modern retail's efficient supply chain and bulk purchasing power have given them a pricing advantage, making it challenging for traditional retailers to compete on price. As consumers seek convenience and a seamless shopping experience, the digital transformation of the retail sector has also led to the emergence of online grocery platforms, further shifting consumer behavior and preferences.

This shift in consumer behavior has had far-reaching implications for the traditional vegetable retailers, posing both challenges and opportunities. On one hand, the modern retail format has streamlined the supply chain, reduced wastage, and enhanced efficiency. On the other hand, the small-scale vegetable retailers are grappling with various issues, including price competition, supply chain disruptions, and adapting to changing consumer preferences.

This study aims to explore the impact of modern supermarkets on traditional vegetable retailers in India. By analyzing the procurement pattern, sale pattern, physical losses in traditional modern retail outlets, assessing the challenges faced by traditional retailers, and understanding the changing consumer behavior, we seek to gain insights into the dynamics of this evolving retail landscape. As we delve into this research, we will also examine the potential strategies that traditional retailers can adopt to sustain and thrive in the face of modern retail's rising dominance.

Thus the emergence of modern supermarkets in India has undoubtedly altered the traditional retail ecosystem,

impacting vegetable retailers in various ways. By delving into this subject, we aim to shed light on the transformation of India's retail sector and provide valuable insights for policymakers, businesses, and stakeholders to navigate these changes effectively.

## 2. Materials and Methods

**2.1 Methods of data collection:** To achieve the objectives of the study, Chikkaballapur district was selected based on the significant contribution to the vegetable production in Southern part of Karnataka having greater opportunity to fulfil demand for vegetables from nearby large consumer market and modern retailing prevalent in Bengaluru with respondents dealing with retailers in modern market formats are prevalent. Tomato, potato and cabbage crops were selected for the study based on the highest area under the crop, representation to different vegetables category and quantity of procurement by the agencies.

To analyze impact of modern retail outlet on tradition retail outlets, 5 modern retail outlets, 30 market intermediaries in traditional retail marketing formats comprising of commission agents (10), wholesalers (10) and retailers (10) were selected. The modern retail outlets considered for the study were Big Basket, Reliance fresh, Natures Basket, More mega store and Namdhari fresh.

### 2.2 Tools of analysis

To achieve the stated objectives of the study, the data collected were subjected to different analytical tools and detail of the various economic and statistical tools used in the present study are presented in the following sections.

**2.2.1 Percentage analysis:** This method uses the following formula

$$P = (Q/R) * 100$$

Where,

P = Percentage

Q = Number of respondents falling in a specific category to be measured

R = Total number of respondents or the population as a whole

### 2.2.2 Garrett's Ranking Technique

The Garret's ranking technique was used to rank the major constraints associated with the retailers in traditional retail outlet and modern retail outlet. The order of the rank given by the respondents was converted into the percent position using the formula (Kumar and Kumar, 2008)

$$\text{Percent position} = (R_{ij} - 0.5) 100 / N \quad (27)$$

Where,

$R_{ij}$  = Rank given for  $i^{\text{th}}$  item by  $j^{\text{th}}$  respondent

$N_j$  = Number of items ranked by  $j^{\text{th}}$  respondent

The percentage position of each rank was translated into scores using the table provided by Garrett and Woodworth (1969). Then, for each factor, the scores of respondents were summarized and divided by the total number of respondents for whom the scores were obtained. The mean score for all variables has been ranked, according to the decision criterion that the higher the rating, greater the order of preference or intensity of the constraint expressed by the respondents.

### 3. Results and Discussion

#### 3.1 Socio-economic characteristic features of traditional retailers

The general characteristic features of retailers in traditional retail formats were analysed and presented in table 1. It could be observed from the results that average age of the respondents was around 42 years. All the respondents were literates of which relatively higher proportion of respondents have completed primary education (43.33%) followed by possession of secondary education (40%) and graduation (16.66%).

The majority of respondents had on an average of 11 years of

experience in vegetables marketing. In the total employment generated in the traditional retail formats to the retailers consisted of 60 percent females and 27 percent males from same family and 13 percent included hired labour. With respect to the operation of retail outlets, approximately 63 percent of the respondents opined that morning hours would be the ideal with greatest volume of sales, while fifty percent of retailers said that evening hours were best for peak sales. The total sample size in the peak sales period exceeds the total sample size as the same respondent opted morning as well as evening as the peak sale period.

**Table 1:** General characteristic features of retailers of traditional retail outlets (n=30)

Sl. No.	Characteristics	Value	Percentage
1.	Age	41.90	
2.	<b>Education</b>		
	Primary	13	43.33
	Secondary	12	40.00
	Graduation	5	16.66
3.	Experience	10.76	
4.	<b>Type of ownership of building premises</b>		
	Owned	12	40.00
	Rented	14	46.67
	Leased	4	13.33
5.	<b>Employment generation Per month</b>		
	Family member		
	Female	24.00	60.00
	Male	11.00	27.50
	Hired	5.00	12.50
6.	<b>Peak sale period</b>		
	Morning	19.00	63.33
	Afternoon	3.00	10.00
	Evening	15.00	50.00

#### 3.2 Physical losses at the retail format level in the Traditional and modern retail outlets

The information presented in table 2 indicates the physical quantity losses of selected vegetables at retail format level in traditional retail and modern retail formats. Quantity handled was found to be the highest in modern retail outlet than its counterparts for three selected vegetables. Additionally, it was

noted that the quantum of loss in respect of tomato in the total quantity handled was relatively more in the modern retail format (14.70 kg/day). The reason could be no procurement of tomatoes on daily basis by the retailers in modern retail outlets, whereas in traditional retail models, they purchase on daily basis due to lack of access to cold storage facilities.

**Table 2:** Physical losses at the retail format level in the Traditional and modern retail outlets

Sl. No.	Particulars	Modern retail outlets (n=5)				Traditional retail outlets (n=30)			
		Tomato	Potato	Cabbage	Total	Tomato	Potato	Cabbage	Total
1.	Quantity handled (kg /week)	279.30	205.45	121.50	606.25	85.25	102.75	60.45	248.45
2.	Quantity of loss (Kg/week)	14.70	4.55	9.5	28.75	9.52	4.25	9.65	23.42
3.	% of wastage for total Quantity handled	5.26	2.21	7.82	4.74	11.17	4.14	15.96	9.43
4.	Procurement price (Rs./kg)	37.50	34.50	26.21	-	35.12	29.15	19.61	-
5.	Total value of loss (Rs.)	551.25	156.96	248.99	957.22	334.34	123.89	189.24	647.47

While with respect potatoes and cabbage the quantity loss per day was slightly higher in traditional retail formats (4.95/kg, 9.65kg) than in modern retail formats (4.55/kg, 9.50 kg). Thus, higher physical losses per day (28.75 kg) was noticed in traditional retail format than in modern retail format (24.12 kg). But the ratio of percentage loss to the total quantity handled was found highest in traditional retail outlets. While the value of loss in monetary terms was less in traditional retail outlets (Rs. 667.87) compared to modern retail format (Rs. 957.22). The reason for this was the modern retail outlet's higher procurement price, at which the losses were estimated.

#### 3.3 Vegetable procurement management by the firms in traditional and modern retail format

In table 3, details on buying pattern of vegetables and the sources of procurement are presented. Vegetables being perishable in nature, hence purchased daily, but the pattern of purchase by the retailers in traditional and modern retail formats was different.

Around 40 percent of the retailers in traditional retail formats resorted to buy almost same quantity every day whereas none of the modern retail format buy same (fixed) quantity on daily basis and use to buy as per some calculation like demand expectation, left over stock, etc. Around 80 percent of

retailers in modern retail formats and 60 percent of retailers in traditional retail format made purchases based on the previous day/week/month sales. All the selected modern retail outlet manage their buying activities based on expected demand in future days/weeks/months, whereas around 73 percent of the traditional retail formats buy based on future demand estimation.

The information on source of purchase by the retailers in two formats is given in table 3. It could be observed from the table

that, 100 percent of retailers in modern retail formats procure from farmers. However, in case of any shortage to meet emergent demand situation due to inability to source from farmers, over 40 percent of retailers in modern retail formats also use to source vegetables from other market intermediaries. In case of traditional retail formats, majority of retailers (93.33%) buy from intermediaries such as wholesalers and commission agents, and 30 percent of them use to buy from farmers.

**Table 3:** Vegetable procurement management by the retail firms in traditional and modern formats (n=30)

Sl. No.	Particulars	Modern retail outlets		Traditional retail outlets	
		No.	Percentage	No.	Percentage
<b>1.</b>	<b>Buying activities</b>				
a.	Buy the fixed quantity every time			12	40.00
b.	Buy based on previous days/weeks/months sale	4	80.00	18	60.00
c.	Buy based on coming days / weeks / months expected demand	5	100.00	22	73.33
<b>2.</b>	<b>Agency from whom they buy</b>				
a.	Farmers	5	100.00	9	30.00
b.	Intermediaries (wholesaler/commission agent)	2	40.00	28	93.33

**3.4 Pattern of sale of vegetables from different retail formats**

According to table 4, it was found that the, average quantity sold by modern retail outlet found to be 279.30 kg, 205.45 kg and 121.50 kg with total sale value of Rs.10473.75, Rs.7088.03 and Rs.3184.52 in case of tomato, potato and cabbage respectively.

Similarly, the quantity sold by traditional retail outlet was 85.25 kg, 102.75 kg and 60.45 with sale value of 2993.98,

2995.16 and 1185.42 by the sale of tomato, potato and cabbage respectively. The aggregate quantity sold by the traditional retail formats was 248.45 kg/day and 606.25 Kg/day in modern retail outlet and average aggregate value for quantity sold was found to be Rs.20746.29 per day in case of modern retail outlet and Rs.7174.57 in case of traditional retail outlet. Hence, highest total sale value and quantity sold was by modern retail outlet followed by traditional retail outlet.

**Table 4:** Pattern of sale of vegetables from different retail formats (n=30)

Sl. No.	Vegetable	Particulars	Modern retail outlets	Traditional retail outlets
1.	Tomato	Quantity (Kg /day)	279.30	85.25
		Price per unit	37.50	35.12
		Total value (Rs.)	10473.75	2993.98
2.	Potato	Quantity (Kg /day)	205.45	102.75
		Price per unit	34.50	29.15
		Total value (Rs.)	7088.03	2995.16
3.	Cabbage	Quantity (Kg /day)	121.50	60.45
		Price per unit	26.21	19.61
		Total value (Rs.)	3184.52	1185.42
4.	Aggregate quantity		606.25	248.45
5.	Aggregate value		20746.29	7174.57

**3.5 Impact of modern retailing system on traditional retailers**

The impact of modern retail outlet on traditional retail outlets in terms of business, profits, number and frequency of customer visits, etc. were analysed and presented in Table 5.

The results reveal that, around 93 percent of respondents of traditional retail outlets expressed that the advent of modern retail stores in their area had caused a significant reduction (25%) in their vegetable sales.

**Table 5:** Impact of modern retailing system on retailers operating in traditional format (n=30)

Sl. No.	Particular	Affected retailers		Impact (%)
		No.	%	
1.	Decline in sales	28.00	93.33	25.00
2.	Reduction in volume of profit	26.00	86.67	27.50
3.	Increase in operational cost	24.00	80.00	44.44
4.	Decrease in number of customers visiting shop	19.00	63.33	30.00
5.	Decrease in frequency of visit	14.00	46.67	40.00
6.	Low customer retention	20.00	66.67	

Approximately 87 percent of respondents opined that the profit of the retail business of vegetables has decreased by about 28 percent and Four-fifth of traditional retailers have experienced an increase in total operational costs of 45

percent. The reasons for shifting of consumers to modern retail outlets was due to changing lifestyles and available opportunity in shopping for their other requirements like stationeries, ration, cloths, etc. It was also noticed that, 63



percent of sample traditional retailers agreed upon the fact that there was decrease in number of customer visiting their shops to the extent of 30 percent. Nearly fifty percent of retailers in traditional format were of the opinion decreased frequency of customers visiting their shop by 40 percent.

### 3.6 Reasons for decline in sales of traditional retailers

The reasons for decline in sales of traditional retail outlets elicited during the survey with retailers of traditional marketing channels were collected and analysed and findings are presented in the table 6. Majority (90%) of the retailers in traditional marketing format opined due to shifting of consumers towards modern retail outlets and emergence of

online or home delivery of vegetables there was decline in their sales and profits.

Nowadays more and more retail outlets are opening the residential areas, therefore 93 percent of the retailers in traditional format opined that this increased competition from newly opened traditional retail outlets was another major cause for reduction in sales of retailers in traditional market format. The other reasons for decline in sales volume and profit of the traditional retailers were increased competition with street vendors (76.67%), difficulty in price reduction due to rising purchase prices and marketing expenses (60.00%) and inability to fulfil consumers' requirements in terms of more variety/ display, credit sales, etc. (36.67%).

**Table 6:** Reasons for decline in sales of traditional retailers (n=30)

Sl. No.	Particulars	Number	Percentage
1.	Shifting of customers towards modern retail outlets	27	90.00
2.	Difficulty in price reduction due to rising purchase prices	18	60.00
3.	Inability to fulfil consumers requirements in terms of more variety/ display, credit sales, etc.	11	36.67
4.	Increased competition with newly opened traditional retail outlet	28	93.33
5.	Increased competition with street vendors	23	76.67
6.	Emergence of Online/home delivery system	27	90.00

### 3.7 Constraints faced by the retailers in traditional retail formats

The constraints faced by the retailers operating in traditional retail format were analysed using garret ranking and findings are summarised in table 7. Retailers in the traditional retail format ranked the absence of storage facility as the most

severe constraint which got a garret score of 80.07. This is because, as vegetables are highly perishable, a lack of storage facilities results in a high proportion of wastage and hence it is coming in their way of realising better income from marketing of vegetables.

**Table 7:** Constraints faced by the retailers in traditional retail formats (n=30)

Sl. No.	Particular	Garret score	Rank
1.	Absence of storage facility	80.07	1
2.	Absence of grading facilities	69.40	2
3.	Failing in assessment of demand	66.10	3
4.	High proportion of wastage of produce	58.17	4
5.	Not able to provide quantity or price discounts	56.33	5
6.	Unhygienic issues in the locality/ premises	53.25	6
7.	Unable to meet consumers expectation	48.67	7
8.	Competitors in the market	46.33	8
9.	Quality of produce	38.67	9
10.	Inadequate physical facility	38.50	10
11.	Absence of wide range of products other than vegetables	26.40	11
12.	Timely availability of produce	19.80	12

Absence of grading facility and failing to assess the demand by the consumers were ranked second and third severe constraints with garret score of 69.40 and 66.10, respectively. The other constraints reported by the retailers in traditional marketing channels in the descending order of their severity included high proportion of wastage of produce (58.17), inability to provide quantity or price discounts (56.33) to customers due to low volume of business, unhygienic issues in the locality/ premises (53.25), unable to meet consumers' expectations (48.67), operation of competitors in the nearby areas (46.33), inability to meet the quality and freshness of produce (38.67), inadequate physical facility (38.50), absence of wide range of products other than vegetables (28.40) and timely availability of produce (19.80).

### 3.8 Constraints faced by the retailers in modern retail formats

Similarly, attempt has been made to analyse the constraints faced by the retailers in modern retail format and results are

presented in table 8. The major constraint encountered by modern retailers were default / delayed supply of the most preferred vegetables to store due to distant and widely spread location of the collection centres or sources of supply.

**Table 8:** Constraints faced by the retailers in modern retail formats (n=5)

Sl. No	Particular	Garret score	Rank
1.	Supply default	75.40	1
2.	Absence of uniform quality procurement	67.67	2
3.	Unsold produce	56.47	3
4.	Price volatility	53.33	4
5.	Space constraint	46.60	5
6.	High procurement price	32.33	6
7.	Parking facilities	29.73	7

Inability to meet the required quality and quantity of the produce by the farmers was the second major constraint with

garret score of 67.67. As major proportion of the procurement by the modern retail formats was from number of farmers producing on smaller area, it is difficult to get uniform quality produce and hence it is challenging for them to obtain produce of a consistent quality. The retailers in modern retail formats were of the opinion that unsold produce and price volatility were also frequently bothering constraints with the corresponding garret scores of 56.47 and 53.33. The other problems like space constraint (46.60), high procurement price (32.33) and parking facility (29.73) were also reported by these retailers hindering them in profitable vegetable business.

### 3.9 Strategies adopted by traditional food retailers to address various constraints in marketing

To minimise the adverse effects of various constraints in marketing of vegetables the retailers have adopted some strategies and are presented in table 9. Majority of respondents (97%) perceived that the ensuring quality product to the consumers was the best strategy to increase sale and also profits. Cleanliness in the premises and offering discounts occasionally were adopted strategies by the 90 percent and 80 percent of the respondents, respectively to boost their sales. The other strategies adopted by the traditional retail outlets were accepting online payment (76.67%), making available more variety of vegetables (73.33%), politeness (66.67%) and offering home delivery (63.33%) to customers.

**Table 9:** Strategies adopted by traditional food retailers (n=30)

Sl. No.	Particulars	Number	Percentage
1.	Politeness while dealing with customers	20	66.67
2.	Ensuring quality to the consumers' expectations	29	96.67
3.	Offering discount occasionally	24	80.00
4.	Trying to ensure more variety of vegetables	22	73.33
5.	Offering home delivery	19	63.33
6.	Accepting online payment	23	76.67
7.	Cleanliness in the premises	27	90.00

### 4. Conclusion

The impact of modern retailers on traditional vegetable retailers in India has been profound and transformative. The rise of modern retail formats, such as supermarkets, hypermarkets, and online grocery platforms, has presented both challenges and opportunities for traditional vegetable vendors across the country. The increased competition from modern retailers has put pressure on traditional vegetable sellers to innovate and adapt their business practices. Modern retail formats offer a wide variety of vegetables, providing consumers with convenience and choice. This has led to a decline in sales of traditional vegetable retailers who may struggle to match the selection and availability offered by their modern counterparts. Moreover, the stringent quality control and standardization practices of modern retailers have raised the expectations of consumers regarding the freshness and safety of vegetables. Traditional retailers may face difficulties in meeting these standards. Accordingly, around 96 percent of the traditional retailers opined that, by ensuring quality of vegetables and meeting consumer expectation make them to retain their loyal customer base.

Despite these challenges, traditional vegetable retailers in India have unique opportunities to leverage their strengths.

Emphasizing on quality sourcing of varieties of vegetables, polite behaviour with customers, accepting online payments, correct measurement of weights, home deliveries and cleanliness in the premises, packaging facility and community ties can help differentiate them from modern retailers. Additionally, embracing technology, establishing an online presence, and exploring collaborations with e-commerce platforms can enable traditional retailers to tap into the growing online vegetable market. Ultimately, a combination of adaptability, resilience, and customer-centricity will determine the success of traditional vegetable retailers in the face of modern retail competition.

### 5. Conflict of Interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

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