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The Fast Moving Consumer Goods (FMCG)Market

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ABSTRACT
In this paper, we investigate whether it is exceedingly expensive to keep and build long-lasting relationships with clients in the FMCG sector due to its characteristics, which include huge volume sales, enormous customer bases, and poor profit margins. Since customers obtain some advantages from consuming FMCGs, marketers and retailers should be aware of these advantages. With this knowledge, marketers can utilise relationship management methods to create loyalty for their products, such as building trust and commitment strategies. Loyalty programmes and cards can support this tactic even more.
Keywords: Fast moving consumer, global FMCG industry, strategies in the FMCG industry

I. INTRODUCTION

The qualities of FMCG products are defined and discussed in this paper. It also addresses the FMCG industry's key participants in South Africa as well as the worldwide, African, and South African FMCG markets. Examining the FMCG market in Africa's growth-promoting factors. The paper makes predictions on what kinds of values consumers may gain from FMCGs and whetheror not they are likely to develop brand loyalty for FMCGs in light of that category's nature.

II. DEFINITIONS AND CHARACTERISTICS OF FMCG

The majority of customers consume FMCGs on a daily basis or at regular intervals (Vaishnani, [1]). FMCGs are characterised as low-priced goods that are often sold by merchants by Kotler and Armstrong [2]. While Fouladivanda et al. [3] see FMCGs as those retail goods that are typically replaced or fully used up over a short period of days, weeks, or months, and within one year, Jogheeand Pillai [4] refer to FMCGs as convenient and low involvement products. They compare it to durable items, which are often changed out over a number of years. Consumer decisions about FMCGs are typically made on a small scale, and manufacturer advertisements and promotions have a significant impact on those decisions (Mbuyazi, [5]).
The food, toiletry, domestic, and health categories are the four main consumer groups that make up the FMCG market (Nayyab, et. al., [6]). Following is a summary of some of the primary characteristics of FMCGs (Tiwari, [7]):

- Frequent purchasing by the consumer.
- Low or nonexistent product involvement with low consumer involvement. Strongly branded products are an exception to this rule.
- Low pricing strategy by the marketer.
- High volume targets expected.
- Contributions with low margins to the advertised product basket.
- Extensive distribution networks.
- High stock turnover.

FMCGs have a limited shelf life due to either strong customer demand or quick product degenera- tion. Meat, fruits and vegetables, dairy products, and baked goods are a few examples of FMCGs that are highly perishable. Other products with high turnover rates include alcohol, toiletries, pre-packaged foods, soft beverages, and cleaning supplies.
From the standpoint of retailers, the FMCG sector is frequently referred to as a ”poor

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margin
- high volume" sector because it largely deals with the production, distribution, and marketing of consumer packaged products (Mohan and Sequeira, [8]; Qasim and Agarwal, [9]). Within the FMCG product categories, price competition between retailers can be fierce, especially as the products are frequently very similar. Companies employ marketing and other strategies to cultivate loyalty to some FMCG categories in order to increase profits (for example drinks, milk, bread, meat, vegetables, soap, soup, maize meal, beans, cool drinks, paper products, pharmaceuticals, packaged food products, household products). These activities allow businesses to raise their prices. Another significant feature of the FMCG industry is that it typically does well during economic downturns, when consumers are more ready to cut back on luxury items and direct their expenditure toward necessities like FMCGs.

Due to increased investment in the FMCG sector, there is an increase in competitiveness among FMCG producers. For instance, India's FMCG industry, which is one of the biggest in the world with a total market size exceeding US$20.1 billion yearly, has experienced tremendous growth. The expansion of the FMCG sector in India is fueled by a number of factors, including the accessibility of essential raw materials, the availability of inexpensive labour, a strong distribution network, fierce competition between organised and unorganised segments, and low operating costs. One of the biggest industries in New Zealand is the FMCG sector, which contributes 5% of the country's GDP.

III. THE GLOBAL FMCG INDUSTRY

FMCGs received very little attention in the past since it was widely believed that their margins were too low for the expense and effort they demanded (Moolla, [10]). However, success in the Indian market rapidly alerted marketers to the possibilities of this sector. According to the FMCG industry in India is expected to expand by 12% and reach US$43 billion in revenue by 2013 and US$74 billion in revenue by 2018. Indian population growth gives marketers with a chance to persuade regular consumers to buy branded FMCG products, particularly in the middle class and rural areas.

In other countries as well, particularly in the United States, where it dominates the economy, the FMCG industry is expanding. Sara Lee, Nestlé, Reckitt Benckiser, Unilever, Procter & Gamble, Coca-Cola, Carlsberg, Kleenex, General Mills, Pepsi, Mars, Nirma, Dabur, and Himani are a few of the most well-known FMCG firms in the world (David, [11]).

The FMCG business offers a wide variety of consumable products at a high financial cost, and competition among FMCG firms is only growing. Daily exposure to hundreds of companies leaves consumers with an overwhelming number of options. The majority of FMCG marketers want to maximise shareholder income by boosting sales through creative marketing initiatives. Top FMCG firms worldwide are distinguished by their capacity to provide goods with the highest consumer demand while simultaneously fostering brand loyalty and confidence.

Globally, attracting and maintaining customers now heavily depends on FMCG brands. Ac- cording to branding FMCGs include accurately placing a product and ensuring that the brand is effectively communicated. Regular market research is also required while maintaining the brand's history.

IV. THE FMCG MARKET IN AFRICA

A World Bank report from 2010 on household FMCG consumption in Africa was presented inthe KPMG 2015 Sector Report (See Figure 1). Based on a sample of 39 African nations, theGlobal Consumption Database of the World Bank estimates that in 2010, household spending on FMCG products was over US$240 billion (KPMG, [15]). According to the survey, household FMCG spending was greatest in Nigeria ($41.7 billion), followed by Egypt ($27.6 billion), South Africa ($23 billion), Morocco ($20.1 billion), and Ethiopia ($19.2 billion).

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Figure 1: 2010 household FMCG Spending ($bn) for 39 African countries

According to World Bank data, household expenditures on FMCG products were US$64.5 billionin 2010, with cereals, grains, and wheat accounting for the greatest portion of that expenditure. Drinks made up a substantially smaller portion of household spending on FMCG goods overall in Africa. Household beverage consumption totaled $22.1 billion in nominal terms in 2010, with $18.1 billion of the amount going toward non-alcoholic beverages. Tobacco (1.8%), personal care (2.9%), and dairy (3%), which together made up a relatively minor portion of household FMCG spendingin Africa in 2010.

Low operational costs, robust distribution networks, and the presence of well-known FMCG corporations are just a few of the benefits of the FMCG industry that have made it so appealing in Africa. Another aspect contributing to the success of FMCGs is population increase.

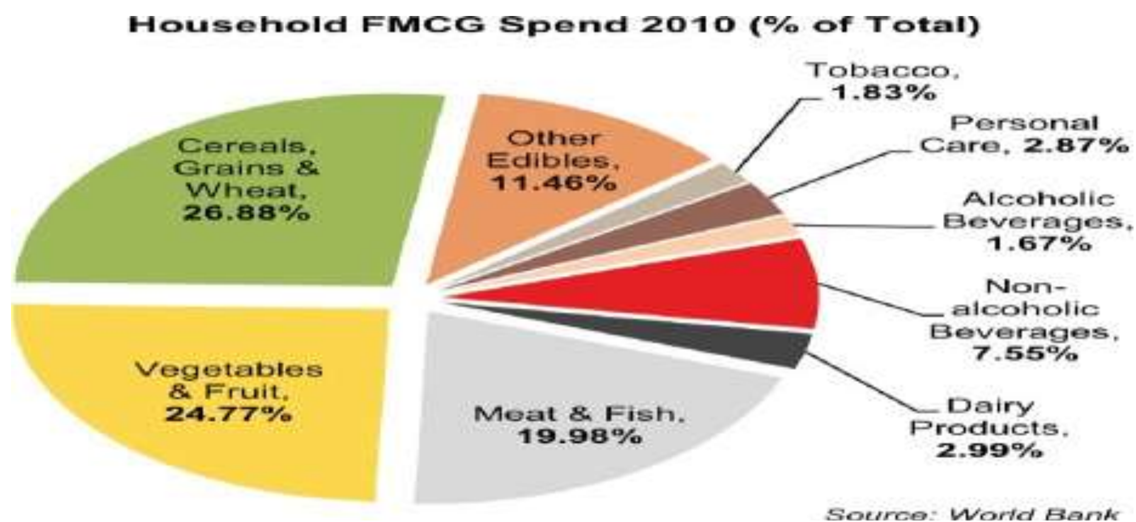

Figure 2: 2010 household FMCG spending according to product categories across 39 African coun- tries

V. THE FMCG MARKET IN SOUTH AFRICA

Consumers in South Africa look for items that perform with quality, dependability, and consistency on a regular basis. Due to the wide variety of cultures, customs, and beliefs present, the South African market is highly fragmented. Historical disparities in consumer purchasing power, illiteracy, and a wide range of

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socioeconomic difficulties are all factors that contribute to the fragmentation (Pillay, [12]).
According to Steenkamp [13], Massmart, Metcash, Shoprite Checkers Group, Pick 'n Pay Group, Spar Group, New Clicks, and Woolworths were the major players in South Africa's FMCG market in 2009, which had a value of roughly ZAR 350 billion. These wholesalers and merchants mostly receive their supplies from multinational corporations like Nestlé, Parmalat, Coca-Cola, Simba/PepsiCo, Kellogg's, and Unilever and sell their products straight to consumers in the South African market. Tiger Brands, Pioneer Foods, AVI Limited, and Clover are a few of the largest South African suppliers.

There are a tonne of categories in the South African FMCG market, but groceries, toiletries, and candy (GTC) account for a considerable portion of sales. Of all the regions, Gauteng has the largest GTC market. The largest rise is likewise seen in Gauteng year over year. FMCG in South Africa experienced a 1% decline in value growth in 2012 as a result of price deflation brought on by market leaders lowering their prices to boost sales volumes following the economic slump. The subsequent economic crisis resulted in a decrease in consumer spending as well.

However, the South African supermarket industry has continued to expand, with a portionof the food retail market valued at ZAR 356.9 billion for the 2014 fiscal year (Trade Intelligence Corporate Comparative Performance Report, 2015). 97% of sales in the official food retail sector in South Africa are accounted for by four large corporations. Around 38% of the formal food retail market was controlled by Shoprite Checkers in 2012, with Pick n Pay coming in second with 31%, Spar with 20%, and Woolworths with 8%. (Battersby and Peyton, [14]). These retail conglomerates serve the needs of the great majority of South African customers through their locations spreadout across the country.

The shops carry a large selection of quickly moving commodities that South African customers buy (Pillay, [12]). The extent to which different retailers serve the South African market is depicted in Figure 3. According to the graph, Shoprite had a 62.48 percent market penetration rate in South Africa for the 2014 fiscal year.

More than 80% of South African FMCG consumers are served by the Shoprite group, SPAR, Pick & Pay, and Woolworths, according to the Trade Intelligence Corporate Comparative Perfor- mance Report (2015).

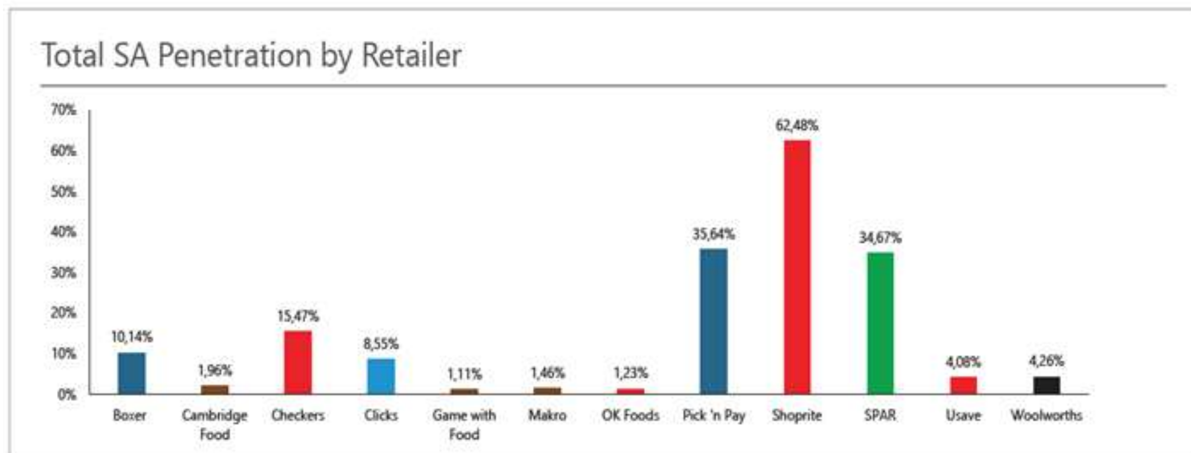

Figure 3: Total penetration of retailers servicing South African consumers

With 2 032 locations and a store footprint share of 31% of all the stores in South Africa in 2014, the Shoprite company had the greatest retail footprint in the country. With 1 870 locations, the SPAR company has a 25% store footprint share. The Pick & Pay group had 1 048 stores and a 15% share of the total shop footprint. With a fast growth rate, the Woolworths group had a store count of 621 and a retail footprint share of 15% of the stores in South Africa. Major supermarkets are moving into formerly unserviced rural areas and low-income urban neighbourhoods. Growing discretionary money among South African consumers is primarily to blame for the expansion.
Because of this extra cash, supermarket retailers and their affiliates, like Pick n Pay's

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Boxerand Shoprite's Sentra, have access to new markets .

The supermarkets are growing through introducing new store formats in addition to expanding into new markets. For instance, Pick n Pay recently announced a deal with BP to construct 120 new convenience stores on the forecourts of gas stations. With the help of Engen, Woolworths operates 45 similar stores.

The South African retailers also conduct business abroad. For instance, Shoprite built its first store outside of South Africa in 1995 and by the end of 2012, it had 131 such supermarkets spread across 16 different African nations.

VI. GROWTH DRIVERS IN THE FMCG MARKET

According to [6, 15, 16], and particularly in Africa, the following are the main factors driving growth in the FMCG industry:

Population size

The types of FMCG products that will be provided to a particular market are determined by a variety of factors, including income per person and population size. To ensure that retailers receive the greatest possible benefit from the largest sectors of the population, the consumer spending trend in FMCGs is tracked.

Spending power

For multilateral organisations, the KPMG 2015 sector study on FMCGs in Africa makes a dis- tinction between four household consumption sectors. Following is a classification of the segments based on income thresholds:

1. Lowest – below US$2.97 per capita a day
2. Low – between US$2.97 and US$8.44 per capita a day
3. Middle – between US$8.44 and US$23.03 per capita a day
4. Higher – above US$23.03 per capita a day.

As opposed to what one might anticipate, the KPMG [15] sector study shockingly reveals that the biggest share of household spending in 2010 (approximately 59%) was accounted for by the 'lowest' income category. Of the overall household expenditure in 2010 for the 39 nations studied, a total of 44% came from the "low" income group, 26% from the "medium" income group, but just about 8% from the "upper" income group. View Figure 4.

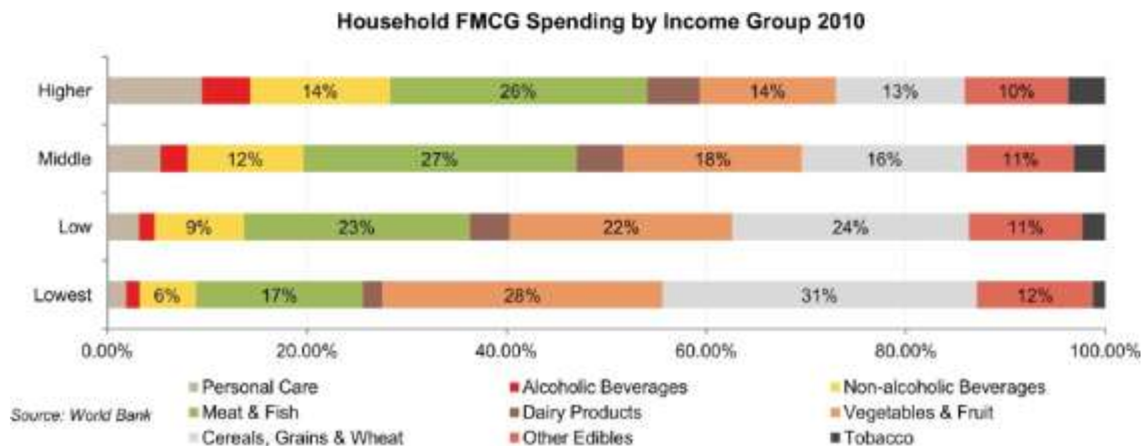

Figure 4: 2010 household FMCG spending by income group for 39 African countries

Population density

Population density is the quantity of people who are placed close to one another. From an FMCG perspective, a large population dispersed across a broad territory does not provide an especially tempting proposition because the logistics costs to serve such a population would be high. For FMCG retailers, having a localised market that is big enough and convenient for everyday product purchases is more advantageous. To put it another way, markets with higher urbanisation rates typically have better prospects for FMCG.

In 2010, Africa has 53 urban agglomerations with a combined population of more than one million. These cities are Cairo, Lagos, Kinshasa, Johannesburg, Luanda, Khartoum, and Dar es Salaam in order of population size. FMCGs have a big market in these cities.

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Infrastructure development

In many African nations, a dearth of good infrastructure continues to be a major barrier to in- creasing levels of foreign direct investment. Weak infrastructures in a given country have a severe effect on the FMCG sector, particularly with regard to the availability of energy and road systems. On the African continent, roads carry 90% of all passengers and 80% of all cargo. Less than half of rural Africans have access to all-season roadways, and few of Africa's highways are paved. Only 18 African nations, including South Africa, had capital stocks of more than US $5 billion in 2013, according to the World Bank (Siag and Choudhary, [16]).

Downstream industry effectiveness

To supply big volumes of high-quality products to FMCG consumers, a sizable number of companies in the FMCG sector rely on downstream domestic industries like manufacturing, agro-processing, and agriculture. Certain FMCG products, particularly some meals and dairy products, have very limited shelf life by nature. To keep product waste to a minimum, businesses frequently need to rely on local supply chains.

When it comes to efficiency and flexibility, downstream sectors are not always able to maintain customer satisfaction and improve their bottom line at the same time. As a result, many FMCG merchants choose to vertically integrate their companies whenever it is practical, for instance by investing in a neighbourhood packaging firm or building a wholly-owned manufacturing facility near to the local market they want to serve. Some organisations may decide not to invest despite market opportunities showing sufficient FMCG demand potential because the costs associated with developing an efficient supply chain may outweigh the benefits on the sales side.

Policy and business legislature

Economic laws and regulations pertaining to trade restrictions, foreign direct investment, real estate, and labour are also significant factors in the development of the FMCG industry. FMCG markets and the business climate are significantly impacted by a nation's economic policies, the calibre of its institutions, and the laws now in effect. Economic loss might result from regulatory trade obstacles that are simply put in place to protect ineffective local producers. In the FMCG industry, even small changes to input costs could have a significant impact and could lead to a loss of market share.

The corporate climate is also impacted by labour and property regulations. The productivity, flexibility, and cost of labour in a nation are significantly influenced by labour laws and the strength of unions. Thus, these elements may have a direct impact on FMCG retailers who rely on regional supply networks. A market's investment appeal may also be increased through legislation and incentive programmes relating to foreign direct investment.

VII. KEY SUCCESS STRATEGIES IN THE FMCG INDUSTRY

According to the KPMG [15] research, certain business tactics are probably what help organisations prosper in Sub-Saharan Africa. Effective marketing to draw in customers, building brand loyalty, and streamlining supply chains to ensure proper pricing and commercial viability are the techniques that define successful businesses. The next section discusses these tactics.

Focussing on country clusters

FMCG retailers are urged to concentrate on country clusters rather than individual countries (i.e., a region that comprises more than one potential market). Focusing on areas with comparable cultures, backed by political stability and high-quality cross-border transportation infrastructure, is another tactic. West Africa (Nigeria, Ghana, and the Ivory Coast), Southern Africa (South Africa, Namibia, Botswana, and Angola), and East Africa were among the typical feasible FMCG clusters found (Kenya, Ethiopia, Uganda and Tanzania).

Localising the product offering

Retailers of FMCG products need to make sure they are well-informed about the demands and lifestyles of consumers in the targeted African nations. This should have an impact on the decisions they make regarding their products, price, and marketing, and their tactics should be appropriately supported by research. According to reports, African customers were brand and quality concerned, but price was still a major factor in their purchases. When Unilever wanted to lower pricing and

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improve affordability by reducing pack sizes and so enabling them to target low income households, the corporation understood this principle. Additionally, it is recommended for FMCG retailers to focus on a variety of price points to distribute the risk among wealthy and lower-income households while relying on customers who regularly purchase FMCG goods (Srivastava and Sharma, [17]).

Making communication media relevant

The brand awareness of shops who use effective communication techniques increases. FMCG firms are recommended to allocate more resources to physical and digital marketing rather than auto- matically using traditional ”above-the-line broadcast media.” Coca-Cola recognised this idea and resorted to giving local retail stores refrigerators. Nestle ́ further illustrated this by promoting its products through the use of regional performers.

Creative supply chain usage

FMCG retailers are urged to give African supply chain models significant consideration. When importing goods, businesses should take import tariffs into consideration. Additionally, they need to be aware of how frequently products are delayed at ports. Manufacturers of FMCG products frequently find incentives to consider sourcing locally; one such example is Unilever's investment in South African manufacturing facilities.

The traditional FMCG brands that customers buy are increasingly being held to higher stan- dards. Additionally, consumers are looking for more convenient goods, including those with pack- aging that preserves food for longer and offers protection for the contents, advertising that keeps them informed of new product advancements, and distribution that keeps goods close to customerneeds. To provide adequate market offerings, all parties engaged in the marketing and distribution of FMCGs needed to be aware of these and other customer expectations.

The values and advantages that FMCGs provide to consumers are also significant. These ideals and advantages are covered in the following section.

VIII. REPORTED VALUES / BENEFITS CONSUMERS GET FROM FMCGS

According to Chaudhuri and Holbrook [18], FMCG consumption can provide consumers with both utilitarian and hedonistic benefits. Hedonic values are a product class's potential for enjoyment, and utilitarian values are the capacity of a product to serve a consumer's needs on a daily basis (Zeeman, [20]).

According to Chitturi et al. [18], hedonic advantages are aesthetic, sensory, and enjoyment- related, whereas utilitarian benefits are the functional, instrumental, and practical benefits of con- sumption goods. Unless they feel they have ”earned the right to indulge,” consumers typically give more weight to utilitarian considerations than hedonic considerations. Consumption of a prod-uct's superior hedonic benefits increases feelings of excitement and joy during promotion, whereas consumption of that product's superior utilitarian advantages increases feelings of security and assurance during prevention.

Prevention goals and utilitarian benefits vs Promotion goals and hedonicbenefits

It is important to achieve prevention goals, such as ”behaving safely and securely” and ”being responsible.” When prevention objectives are met, the likelihood of unpleasant experiences is either completely eliminated or greatly reduced. Thus, as a result of the achievement of prevention aims, consumers feel good.

Goals for promotion include things like ”appearing cool” and ”being sophisticated,” among others. When promotion goals are achieved in the context of product consumption, the likelihood of a pleasant experience increases dramatically, allowing consumers to feel the feelings that come from the achievement of promotion goals.

Utilitarian benefits and confidence/security vs hedonic benefits and excite-ment/cheerfulness

It has been demonstrated that utilitarian advantages are viewed as being more in line with require- ments or needs that assisted in achieving preventative objectives. However, if prevention objectives are not met, customers feel more pain in the form of unfavourable emotions. The ”aspire-to-meet”aspect of promotion goals, on the other hand, draws customers' attention to the hedonic advantages of a product. Promotional goals not being achieved is interpreted as a decrease in pleasure rather than an increase in pain. This is because hedonic benefits are viewed as being more similar to the luxuries or desires

that promotion goals satisfy.

Utilitarian benefits and satisfaction; hedonic benefits and delight

Hedonistic advantages improve enjoyment whereas utilitarian benefits accomplish marketing ob- jectives and relieve pain. However, simply avoiding pain by attaining prevention goals would not suffice to pleasure clients. The achievement of promotion goals via the consumption of hedonic ad- vantages must be balanced with the accomplishment of prevention goals through the consumptionof utilitarian benefits.

Prevention goals and anger; promotion goals and dissatisfaction

While not meeting hedonic expectations only resulted in unhappiness, not meeting utilitarian ex- pectations frequently results in rage. The satisfaction of consumers' utilitarian expectations is seen as essential. Consumers are prone to feel strong, unpleasant feelings that are high in arousal when a product doesn't fulfil a need (i.e., a utilitarian expectation). Contrarily, failure to achieve aspired-to promotion goals and hedonic expectations is likely to elicit low arousal feelings of grief and disap- pointment, which results in dissatisfaction. With preventative and promotion objectives in mind, consumers approach shopping for FMCGs with utilitarian and hedonistic shopping motivations.

Categories of utilitarian and hedonic shopping motivations

The categories of utilitarian shopping motivations are summarised as follows by Zeeman [20]:

1. **Achievement** Consumers with utilitarian motivations assess a shopping experience in light of whether the intended buying aim was achieved. According to Jones et al. [21], as these con- sumers are frequently non-emotional and goal-focused, the acquisition of things is significantto them.
2. **Efficiency** Efficiency is a common incentive in which a consumer tries to quickly meet an- ticipated demands. When a consumer spends less time purchasing a product and has more opportunities to shop, a retail establishment often offers convenience (Zeeman, [20]).

Zeeman [20] offers the following categories for hedonic shopping motivations:

1. **Gratification shopping** According to customers who purchase for self-gratification do so to pamper themselves, relieve stress, or brighten a dark mood. Customers that are motivatedby satisfaction want to treat themselves to feel special and good, according to Wagner and Rudolph.
2. **Adventure shopping** Adventure shopping, is defined as consumer spending done for a sense of adventure or stimulation as well as to feel as though one is in an other world. Customers who want sensory stimulation as well as a way to exhibit their individuality are inspired by other adventure shoppers.
3. **Idea shopping** According to, concept shoppers are those who try to keep up with the latest styles and trends while looking for novel goods and ideas. These customers seek information on recent advancements, novel goods, and novel applications for existing products.
4. **Social shopping** According to, social shoppers are those who look for chances to interactor socialise with others who share their interests. Typically, hedonistic shoppers see going shopping with friends and family as a social outing.
5. **Role shopping** Zeeman [20] characterises role shoppers as those who enjoy purchasing thingsfor other people, such as gifts.
6. **Value shopping** Value shoppers are customers who have an emotional connection to the brands and items they are interested in, and who also love haggling with salespeople to get a good deal. These customers feel clever about their purchases when they earn a better discount.

No matter what kind of value consumers are looking for, the degree of purchasing values they receive have an impact on their pleasure, which in turn has an impact on their loyalty attitudesand other results.

These interactions may be moderated by additional factors including trust, the supplier's adapt- ability, the length of the relationship, or switching costs.

Chaston contend that the FMCG market's high volume sales nature is accompanied with a sizable client base and low profit margins, making the development of long-term partnerships costly. But according to research, loyalty can be increased by emphasising commitment and trust.

IX. CONCLUSION

In this study, we examine whether the FMCG industry's traits, such as high volume sales, sizable customer bases, and slim profit margins, make it too expensive to maintain and develop long-term connections with customers. Customers benefit from eating FMCGs in some ways, thus marketers and retailers should be aware of these benefits. Knowing this, marketers can use relationship management techniques to foster loyalty for their goods, such as strategies for fostering commitment and trust. This strategy may be strengthened even further through loyalty programmes and cards.

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