

A Study on Distribution Channel Effectiveness and Retail Practices of ITC Personal Care Products in Chemist Outlets, Trichy

1.Ms. R. Javi Prabha MBA, NET Asst Professor

School of Management, Dhanalakshmi Srinivasan University, Tiruchirappalli -621112

Email: javiprabha.son@dsuniversity.ac.in

2.B. Vinith, A-11724500114, II - MBA

School of Management, Dhanalakshmi Srinivasan University, Tiruchirappalli -621112

Abstract

This study investigates the effectiveness of distribution channels and retail practices of ITC Personal Care Products (PCP) in chemist and cosmetic outlets in Trichy (Tiruchirappalli), Tamil Nadu. Based on primary data collected from 450 retail outlets through structured questionnaires, field visits, and direct interviews, the research identifies critical gaps in ITC's distribution coverage, product visibility, and retailer engagement. The findings reveal that 41.6% of surveyed outlets receive no or rare visits from ITC sales representatives, 37.6% carry none of the ITC PCP products surveyed, and 47.1% have never placed a single order for ITC PCP products. Statistical analysis — including One-Way ANOVA across 10 variables, Chi-Square hypothesis testing across five thematic groups, Pearson's correlation analysis, and weighted average ranking — confirms that these gaps are statistically significant and structurally driven. Competitor brands, particularly Dettol and Lizol, enjoy substantially higher retail penetration across all product categories. However, 60% of surveyed retailers expressed interest in stocking ITC PCP products, indicating a significant and addressable conversion opportunity. The study concludes with seven actionable recommendations centred on strengthening sales force coverage, improving trade margins, executing structured merchandising programmes, and investing in consumer brand-building to enable ITC to substantially improve its market penetration in Trichy.

Keywords: *Distribution Channel Management, Retail Practices, FMCG, ITC Personal Care Products, Savlon, Nimyle, Chemist Outlets, Trichy, Competitor Analysis, Trade Margins, Sales Force Coverage, Market Penetration*

Introduction

ITC Limited is one of India's most diversified and leading conglomerates, with a strong presence across multiple sectors including Fast-Moving Consumer Goods (FMCG), Hotels, Paperboards & Packaging, Agribusiness, and Information Technology. Established in 1910 as the Imperial Tobacco Company of India, ITC has evolved into a multi-business enterprise focusing on innovation, sustainability, and value creation. The company's FMCG segment — particularly its Personal Care Products (PCP) division — includes well-known brands such as Vivel, Fiama, Savlon, Engage, and Nimyle, which cater to hygiene, grooming, and wellness needs across diverse consumer segments.

The Indian FMCG-Personal Care market was valued at approximately USD 110 billion in 2023 and is projected to grow at a CAGR of 14.9% to reach USD 220 billion by 2025, driven by rising disposable incomes, urbanization, and heightened

health awareness. This growth has intensified competition among major players such as Hindustan Unilever Limited (HUL), Procter & Gamble (P&G), Reckitt Benckiser, Dabur India, and Colgate-Palmolive. In this highly competitive environment, product quality alone is insufficient — effective distribution networks and strong retail execution become critical determinants of market success.

Chemist and medical outlets occupy a unique and strategically important position in the FMCG distribution ecosystem, particularly for hygiene and healthcare-related products. In cities like Trichy, these outlets serve as primary points of purchase for products such as antiseptic liquids, hand washes, sanitizers, and disinfectants. Despite ITC's strong brand portfolio and extensive national distribution infrastructure, significant gaps exist in its retail penetration of the Trichy chemist channel. This study systematically investigates these distribution gaps, analyses competitor positioning, evaluates retailer behaviour, and proposes evidence-based recommendations for improvement.

Scope and Significance

The study is geographically focused on Trichy (Tiruchirappalli), an important Tier-2 commercial and educational hub in Tamil Nadu. Approximately 450 chemist and cosmetic outlets were surveyed, providing a large and statistically reliable sample. The research covers ITC PCP categories including soaps, hand washes, sanitizers, antiseptic liquids, and floor cleaners, and includes comparative analysis of competitor brands. The study is significant for ITC in generating data-driven insights for distribution strategy formulation, and for academia in demonstrating applied analytical methods in FMCG channel research.

Review of Literature

A comprehensive review of 15 published research studies provides the theoretical and empirical foundation for this investigation. These studies span the areas of distribution channel management, retail practices, FMCG market dynamics, and personal care product marketing.

Kotler and Keller (2016) demonstrated that multi-tier distribution networks significantly outperform single-tier systems in achieving market penetration, and that retail execution quality — including shelf placement, display, and stock replenishment — is a key determinant of FMCG sales performance. Their work establishes the theoretical link between distribution channel design and retail-level outcomes that underpins this study.

Verhoef and Bijmolt (2022) found, through a survey of over 600 marketing practitioners, that retailers maintaining consistent stock availability and strong visual merchandising reported 38% higher consumer repurchase rates. The study also confirmed a significant positive correlation between sales representative visit frequency and retailer willingness to increase shelf space for a brand — directly relevant to ITC's coverage gaps in Trichy.

Shankar et al. (2011) surveyed 820 retail outlet managers across urban and semi-urban Indian markets and confirmed that point-of-purchase display and shelf positioning account for up to 40% of unplanned purchase decisions in the personal care category. In chemist outlets specifically, product placement near checkout and health advisory areas significantly boosted impulse purchases — a critical finding for ITC's merchandising strategy.

Kumar and Puri (2019) surveyed 350 FMCG retailers across Tier-2 cities in Tamil Nadu and Karnataka and found that trade margin levels are the single most influential factor in retailer stocking decisions, followed by delivery reliability and brand awareness.

Chandra and Rustagi (2018) studied competitive dynamics between Dettol and Savlon across five Indian cities, finding that Dettol commanded a 48% higher retailer stocking rate than Savlon despite comparable product quality. This was attributed primarily to stronger brand recall and more frequent distributor visits. Mohan and Krishnamurthy (2020) specifically

examined FMCG distribution in South Indian markets and found that targeted sampling programmes increased retailer willingness to stock new ITC products by 55%.

Srivastava and Kaul (2014) found that supply chain responsiveness — fulfilling orders within 24 hours — was the strongest predictor of retailer satisfaction and repeat ordering, and that retailers experiencing frequent stockouts were 68% more likely to switch to a competitor brand. This finding is particularly relevant given that 13.3% of Trichy outlets frequently experience ITC PCP stockouts.

Company Profile and Study Area

ITC Limited – An Overview

ITC Limited, headquartered in Kolkata, is one of India's foremost multi-business enterprises with a market capitalization exceeding the top rankings of Indian companies. Its FMCG segment includes Cigarettes, Foods, Personal Care, Education & Stationery, and Agarbattis & Safety Matches. The Personal Care Products (PCP) division, which is the focus of this study, encompasses a portfolio of brands positioned across mass, mid, and premium segments.

Brand	Category	Key Variants	Market Positioning
Savlon	Antiseptic / Hygiene	ASL, Hand Wash, Soap, Sanitizer	Health & hygiene leader
Nimyle	Floor Cleaner	Pine, Citrus, Neem variants	Challenger to Lizol
Fiama	Bath & Body	Shower gels, soaps	Premium segment
Vivel	Personal Care	Soaps, creams	Mass & mid segment
Engage	Deodorants	Sprays, roll-ons	Youth segment

ITC's Distribution Network

ITC has built one of India's most extensive FMCG distribution networks, covering over 6 million retail outlets across urban and rural markets. The distribution hierarchy operates through: Manufacturing Units → Carrying and Forwarding Agents (CFAs) → Super Stockists → Distributors → Wholesalers → Retailers. For PCP, dedicated distributors manage specific territories, supported by Sales Officers and Territory Sales In-charges who conduct planned outlet visits, check stock levels, collect orders, and execute merchandising activities.

In the Trichy market, ITC's PCP distribution operates through authorized distributors covering different city zones. The present study reveals that 41.6% of surveyed outlets report that ITC sales representatives visit them never or rarely — a significant gap that represents the primary distribution weakness identified in this research.

Study Area – Trichy (Tiruchirappalli)

Tiruchirappalli, the fourth largest city in Tamil Nadu with a population of approximately 1.1 million, is an important commercial, educational, and industrial centre situated on the banks of the Cauvery River. The city hosts BHEL, cement plants, and a thriving SME sector, and serves as a retail and distribution hub for surrounding districts including Karur, Pudukottai, and Perambalur.

The chemist and pharmacy sector is particularly well-developed, with numerous standalone medical stores, pharmacy chains, and cosmetic outlets serving both residents and patients accessing the city's major hospitals.

Growing consumer awareness about hygiene and personal care, driven by urbanization and post-pandemic health

Research Methodology

Research Design

The study follows a descriptive research design, aiming to analyze real-time market conditions, retailer behaviour, and distribution effectiveness in Trichy without manipulating any variables. This approach enables a comprehensive description of the characteristics of ITC's distribution channels and retail practices, capturing both quantitative performance data and qualitative retailer insights.

Data Collection

Data Type	Collection Method
Primary Data	Structured survey questionnaire (20 questions) administered to retail outlet owners and managers; direct interviews and field observation of stock availability, product display, and competitor presence.
Secondary Data	Company reports, ITC's internal sales data, product brochures, online sources, and the company's official website; academic literature on FMCG distribution and retail management.
Sample	450 medical and cosmetic outlets selected through purposive sampling — active retail stores dealing in personal care and hygiene products, including 48 newly added outlets.
Study Area	Trichy (Tiruchirappalli), Tamil Nadu — central, residential, and semi-urban areas.
Duration	Three months as part of an internship programme.

Analytical Tools

- Frequency Analysis with Percentage (Q1–Q20, n=450)
- One-Way ANOVA Analysis — 10 hypothesis tests by Outlet Type
- Chi-Square Hypothesis Testing — 5 thematic groups
- Weighted Average and Ranking Analysis — Retailer motivation factors
- Pearson's Correlation Analysis — Key variable pairs
- Comparative Analysis — ITC vs. Competitors across product categories

Data Analysis and Results

Section A: Frequency Analysis – Key Findings

Frequency analysis was conducted across all 20 survey questions administered to 450 retail outlets. The following table summarises the most strategically significant findings from the frequency distribution.

Survey Variable	Key Finding	Strategic Implication
ITC Service Coverage (Q1)	54.2% regularly serviced; 18.0% previously serviced but stopped; 13.1% occasional	Significant service discontinuity requiring immediate territory restructuring
Outlet Age (Q2)	73.5% operating 3+ years	Mature, high-value retail partners being under-served by ITC
ITC Product Visibility (Q4)	Only 17.6% prominently displayed; 46.5% have zero or negligible ITC presence	Critical merchandising gap across all outlet types
ITC Product Availability (Q5)	37.6% carry NO ITC PCP products; Savlon Hand Wash leads at 25.6%	Urgent distribution push required across all Savlon variants
Competitor ASL (Q6)	Dettol ASL alone: 39.3%; Savlon ASL alone: 21.3%	ITC must convert Dettol-only outlets to dual or Savlon stocking
Competitor Hand Wash (Q7)	Dettol Hand Wash: 46.2% visibility vs Savlon: 18.7%	Savlon Hand Wash visibility is 2.5x lower than Dettol
Floor Cleaner (Q10)	Lizol top seller: 47.8%; Nimyle: 20.2%; 22.7% sell no floor cleaner	22.7% of outlets = prime untapped opportunity for Nimyle
Sales Rep Visits (Q17)	41.6% receive no or rare visits; only 13.8% weekly	Root cause of most distribution failures in the study
Retailer Interest (Q12)	60.0% interested (23.6% very interested + 36.4% need information)	Large addressable conversion opportunity being missed
Trade Margin Incentive (Q18)	37.6% cite better margins as primary motivation to stock ITC	Trade scheme improvement is ITC's highest-impact lever

Market Demand (Q19)	56.9% rate demand as high or very high	Strong market pull validates ITC's expansion opportunity
Stock Availability (Q20)	34.4% have never ordered ITC PCP; 13.3% face frequent stockouts	Supply chain and coverage failures are compounded

Section B: One-Way ANOVA Analysis

One-Way ANOVA was applied to determine whether statistically significant differences exist in key response variables across the four outlet types: General/Kirana (n=223), Medical/Pharmacy (n=117), Supermarket (n=73), and Wholesale Distributor (n=37). The significance level is $\alpha = 0.05$; critical F-value at $df_1=3$, $df_2=446$ is 2.62.

Test	Variable Tested	F-Value	F-Critical	p-Value	Result
1	ITC PCP Visibility (Q4)	6.11	2.62	0.0004	Significant
2	ITC PCP Availability (Q5)	7.08	2.62	<0.001	Significant
3	Monthly Purchase Dettol ASL (Q13)	8.38	2.62	<0.001	Significant
4	Monthly Purchase Floor Cleaner (Q14)	11.47	2.62	<0.001	Significant
5	Monthly Purchase Hand Wash (Q15)	14.87	2.62	<0.001	Significant
6	Sales Rep Visit Frequency (Q17)	8.91	2.62	<0.001	Significant
7	Competitor ASL Availability (Q6)	7.57	2.62	<0.001	Significant
8	Competitor Hand Wash Visibility (Q7)	6.46	2.62	0.0003	Significant

9	Competitor Sanitizer Sales (Q8)	9.99	2.62	<0.001	Significant
10	Competitor Floor Cleaner Sales (Q10)	10.43	2.62	<0.001	Significant

All 10 F-values exceeded the critical threshold of 2.62, resulting in rejection of the null hypothesis in every test. This confirms that outlet type is a statistically significant determinant of ITC PCP product performance across all measured dimensions. Key ANOVA conclusions are as follows:

- ITC PCP visibility and availability are significantly better in Medical/Pharmacy outlets compared to Kirana and wholesale channels, despite Kirana stores representing 49.6% of the sample.
- Monthly purchase values for competitor products are highest in wholesale and supermarket channels — precisely the segments where ITC's coverage is weakest, creating a compounded disadvantage.
- Sales rep visit frequency is lowest for Kirana stores, despite their dominance in the retail landscape, indicating an urgent need for territory restructuring.
- Competitor brand dominance (Dettol in Kirana; Lizol in wholesale) is most pronounced in channels that ITC underserves — indicating a strategic realignment imperative.

Section C: Chi-Square Hypothesis Testing

Chi-Square tests were conducted across five thematic groups at $\alpha = 0.05$. All five tests confirm statistically significant differences, validating the key performance gaps identified in the frequency analysis.

Theme	Variables	Chi-Square Calculated	Critical Value (p<0.05)
1. Distribution & Service Effectiveness	Q1 (Service Coverage), Q17 (Visit Frequency), Q20 (Stock Availability)	410.31	16.919 (df=9)
2. Product Visibility & Availability	Q4 (ITC Visibility), Q5 (ITC Availability)	98.10	14.067 (df=7)
3. Competitor Dominance	Q6–Q11 (Competitor stocking & sales across all categories)	391.76	19.675 (df=11)
4. Retailer Interest & Motivation	Q12 (Interest), Q16 (Competitor reason), Q18 (Incentive)	192.09	16.919 (df=9)

5. Purchase Value & Market Demand	Q13–Q15 (Purchase values), Q19 (Demand)	133.87	16.919 (df=9)
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In all five themes, the null hypothesis is rejected, confirming: (1) ITC's service coverage is highly unequal and disproportionately concentrated; (2) product visibility and availability fall significantly short of market penetration requirements; (3) competitor brands enjoy statistically significant advantages in stocking and sales patterns; (4) retailer motivation is structured and addressable through targeted trade and information programmes; and (5) market demand in Trichy is robust and concentrated at mid-value purchase ranges.

Section D: Weighted Average Ranking Analysis

Retailers ranked four factors that would most encourage them to stock or increase ITC PCP products (Rank 1 = most important, weights: Rank 1=4, Rank 2=3, Rank 3=2, Rank 4=1).

Factor	Weighted Total	Mean Score	Overall Rank
Better Trade Margins / Schemes	1476	3.28	1
Faster Delivery and Supply	1246	2.77	2
Consumer Demand / Pull	1175	2.61	3
More Display / Visibility Support	1096	2.44	4

Better trade margins and schemes rank as the most critical factor (mean score 3.28), followed by faster delivery and supply (2.77), consumer demand/pull (2.61), and display/visibility support (2.44). This confirms that ITC must prioritize improving trade scheme competitiveness as its primary lever for retailer adoption, while simultaneously addressing supply chain efficiency and consumer-level brand building.

Section E: Pearson's Correlation Analysis

Pearson's correlation analysis examines the strength and direction of association between critical distribution and performance indicators.

Variable Pair	Correlation (r)	Interpretation	Significance
Sales Rep Visit Frequency vs. Product Visibility	+0.782	Strong positive	Significant (p<0.05)
Sales Rep Visit Frequency vs. Retailer Interest	+0.694	Strong positive	Significant (p<0.05)
Product Visibility vs. Stock Availability	+0.718	Strong positive	Significant (p<0.05)
Trade Margin Satisfaction vs. Retailer Stocking	+0.651	Moderate positive	Significant (p<0.05)
Competitor Brand Visibility vs. ITC Brand Stocking	-0.643	Moderate negative	Significant (p<0.05)
Outlet Operational Age vs. Retailer Interest	+0.412	Moderate positive	Significant (p<0.05)

The correlation between sales rep visit frequency and product visibility ($r = +0.782$) is the strongest association in the dataset, establishing beyond statistical doubt that increasing sales force coverage is the most impactful distribution lever available to ITC. The strong positive correlation between product visibility and stock availability ($r = +0.718$) indicates that improved in-store presence directly influences retailer inventory management behaviour. The moderate negative correlation between competitor brand visibility and ITC stocking ($r = -0.643$) confirms that Dettol and Lizol's dominance actively crowds out ITC products from retail shelves. All correlations are statistically significant at $p < 0.05$.

Key Findings

Findings on Distribution and Service Coverage

- 54.2% of surveyed outlets report that ITC currently services them regularly, while 18.0% report that ITC previously serviced them but has stopped — a significant lapse in distribution continuity.
- 41.6% of outlets receive no or rare visits from ITC sales representatives — the single largest operational weakness identified in this study, directly causing poor visibility, stocking gaps, and lost orders.
- 47.1% of surveyed outlets have never ordered ITC PCP products, representing a massive untapped retailer base. Only 30.7% receive reliable and timely supply.
- 73.5% of sampled outlets are well-established businesses with 3 or more years of operation, confirming that ITC is failing to reach a large proportion of its ideal distribution partners.

Findings on Product Visibility and In-Store Presence

- Only 17.6% of outlets display ITC PCP products prominently. 30.9% have no visibility and 15.6% are entirely unaware of ITC PCP products — meaning nearly half of all outlets have zero or inadequate ITC brand presence.
- Savlon Hand Wash is the most widely stocked ITC PCP product at only 25.6% of outlets. Savlon Hand Sanitizer and Savlon Soap are each stocked in 18.4% of outlets. A troubling 37.6% carry none of the ITC PCP products surveyed.
- Chi-square analysis (Theme 2, chi-sq = 98.10) confirms a statistically significant deviation from expected distribution, indicating ITC's in-store presence is far below the level required for effective market penetration.

Findings on Competitor Brand Dominance

- Dettol dominates all product categories: Hand Wash visibility at 46.2%, Sanitizer sales at 43.6%, Soap popularity at 43.6%, and ASL-only stocking at 39.3% of outlets.
- Lizol commands 47.8% of floor cleaner sales, significantly ahead of Nimyle at 20.2%. Notably, 22.7% of outlets sell no floor cleaner brand — a prime entry opportunity for Nimyle.
- Chi-square test for competitor dominance (chi-sq = 391.76 vs. critical 19.675) confirms the magnitude of the competitive gap is statistically significant across all product categories.

Findings on Retailer Interest and Market Demand

- 60% of surveyed retailers expressed interest in stocking ITC PCP products — 23.6% very interested and 36.4% interested but needing more information. This latent demand represents a significant unactioned conversion opportunity.
- Brand loyalty and awareness (49.6%) is the primary reason consumers choose competitor brands, followed by better pricing and discounts (28.9%), confirming that ITC must invest in both consumer marketing and competitive trade schemes.
- 56.9% of outlets rate demand for hygiene and personal care products as high or very high, validating strong market pull in Trichy for ITC's PCP brands if distribution gaps are resolved.

Suggestions and Recommendations

1. Strengthen Sales Force Coverage (Highest Priority)

ITC should immediately restructure its sales territory design in Trichy to ensure every active retail outlet receives at least fortnightly visits from a sales representative. The 41.6% of outlets receiving no or rare visits represents the root cause of most other distribution failures. Recommended actions include: increasing dedicated field sales executives in Trichy, implementing a Daily Call Report (DCR) monitoring system, setting minimum visit frequency standards by outlet classification, and designating high-potential medical and pharmacy stores for weekly priority servicing.

2. Improve Trade Margin Competitiveness

ITC should conduct competitive benchmarking of trade margins across all PCP categories versus Dettol and Lizol. Where gaps exist, ITC should introduce enhanced scheme structures: higher primary margins, secondary performance bonuses, free goods schemes, gift incentives, and quarterly reward programmes. Tiered margin structures rewarding outlets for higher purchase volumes and product assortment breadth would be particularly effective in converting interested but uncommitted retailers into loyal ITC stockists.

3. Execute Structured Merchandising Programmes

A comprehensive in-store merchandising programme should be designed for the Trichy chemist channel, including: branded display stands and shelf units at high-potential outlets, point-of-sale materials (danglers, shelf strips, counter cards), sales representative training on planogram execution, and exclusive shelf-area incentives. Regular merchandising audits should verify compliance and identify improvement opportunities.

4. Launch Retailer Awareness and Education Initiatives

Given that 36.4% of interested outlets need more information before committing to stocking ITC PCP products, ITC should develop a structured retailer education initiative including: retailer meet programmes at the distributor level, product information kits (feature sheets, clinical endorsements, consumer testimonials), live product demonstrations in the outlet, and a dedicated WhatsApp business channel for retailer queries and order placement.

5. Drive New Outlet Expansion

47.1% of surveyed outlets have never ordered ITC PCP products. ITC should establish a structured new outlet development programme with monthly addition targets. Newly onboarded outlets should receive welcome kits including product samples, branded display materials, and introductory trade offers. Special focus should be placed on the 22.7% of outlets currently selling no floor cleaner — ideal entry points for Nimyle as a first-mover offering in this sub-category.

6. Invest in Consumer Brand-Building

Since brand awareness and loyalty drives 49.6% of competitor preference, ITC must invest in sustained consumerlevel marketing for Savlon and Nimyle in Trichy. Recommended activities include geo-targeted digital advertising, local language (Tamil) radio and cable TV advertising, outdoor advertising in high-footfall areas, consumer trial packs, combo offers, and loyalty programmes to accelerate trial and build the consumer pull that retailers need to justify stocking ITC products.

7. Improve Supply Chain Reliability

ITC should work with its Trichy distributors to improve order fulfilment timelines and reduce stockout frequency. Implementing demand forecasting at the distributor level, maintaining adequate safety stock for fast-moving SKUs like Savlon Hand Wash, and establishing clear delivery time commitments would significantly improve retailer satisfaction. A real-time inventory visibility tool for distributors and sales representatives would enable proactive replenishment and reduce the 13.3% frequent stockout rate that currently frustrates retailers.

Conclusion

This study presents a comprehensive, data-driven analysis of ITC's distribution channel effectiveness and retail practices across 450 chemist and cosmetic outlets in Trichy. The research establishes, through multiple statistical methods, that while ITC possesses a portfolio of strong and well-recognized personal care brands — particularly Savlon, Nimyle, Fiana, Vivel, and Engage — its distribution execution in Trichy falls significantly short of its potential.

The three most critical gaps identified are: firstly, an acute shortage of sales representative coverage, with 41.6% of outlets receiving no or rare ITC visits; secondly, inadequate product visibility and in-store presence, with nearly 47% of outlets having zero or minimal ITC brand display; and thirdly, a large untapped retailer base, with 47.1% of outlets having never placed a single order for ITC PCP products. These failures are compounded by the strong competitive position of Dettol and Lizol, which enjoy significantly higher retailer stocking rates and consumer brand recognition across all relevant product categories.

However, the study also reveals a highly encouraging finding — 60% of surveyed retailers are interested in stocking ITC PCP products, and overall demand for hygiene and personal care products in Trichy is strong, with 56.9% of outlets rating demand as high or very high. The correlation between sales force visit frequency and product visibility ($r = +0.782$) establishes that increasing field sales coverage is the highest-impact lever available to ITC. All five chi-square themes, all 10 ANOVA tests, and the weighted average ranking analysis consistently confirm the same conclusion: ITC's distribution gaps are statistically significant, structurally driven, and directly addressable through targeted operational interventions.

In conclusion, ITC has the brands, manufacturing capability, and national distribution infrastructure to significantly outperform its current position in Trichy. What is required is a focused, city-level execution strategy prioritizing outlet coverage, trade competitiveness, in-store visibility, and retailer education. Systematic implementation of the seven recommendations arising from this study has the potential to substantially increase ITC's active retail base, improve product availability, and grow market share across Savlon, Nimyle, and related PCP segments in Trichy within a short to medium timeframe.

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