

- 1) Intense competition, especially (kirana) (98%)
- 2) Poorly developed infrastructure
- 3) Unique buying behavior
- 4) Rising real state prices
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- 5) Political risk





#### 'BPS' SOLUTION

- · Basic model: mini-shops
- · Product line
- · Supply chain optimization









- · High impact/low probability
  - · Shift to hypermarket
  - Market rejection of the mini-shop model
  - Political resistance
  - E-Commerce takes off
  - Fresh & Easy failure in the US

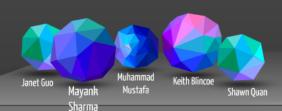






#### SUMMARY

Evolution for the front end, revolution for the back end







#### IMPLEMENTATION PROCESS

#### Success factors (measurement)

Penetration rate Brand awareness (ST) & loyalty (LT) Cash flow cycle (A/P, A/R, inventory)



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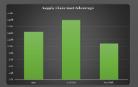






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# IDENTIFICATION OF ISSUES

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