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Driving Outlet Expansion, Coverage and Assortment Growth in the Kandivali Belt: A Field Sales Execution Study of a Consumer Healthcare Company in Mumbai

Vaishnavi Rajiv Jadhav^{1*}, Mr. Mayur Jaybhay²

¹Student, School of Business, Indira University, Pune, Maharashtra, India

²Guide, School of Business, Indira University, Pune, Maharashtra, India

*Email: vaishnavi.jadhav@indirauniversity.edu.in

ABSTRACT

Fast-moving consumer goods (FMCG) companies in India still depend heavily on traditional General Trade (GT) outlets, yet outlet-level performance is often judged by coverage counts rather than by the quality of servicing. This paper reports a two-month field study conducted from 15 May to 15 July 2026 in the Kandivali belt of Mumbai with Haleon India Pvt. Ltd., a consumer healthcare company. Using a descriptive, exploratory and participant-observation design, the study examined four aspects of GT sales execution: outlet expansion, breadth of beat coverage, quality and regularity of outlet servicing, and in-store retail execution, including assortment and point-of-sale materials (POSM). Data were gathered through direct observation, retailer interaction, order booking on a sales force automation application, market mapping and discussions with area sales in-charges. Field tracking covered 415 existing registered GT outlets across 24 beats. During visits and market mapping, 28 outlets were identified as under-serviced; because outlets were not audited exhaustively, this is a count of observed gaps and not a measure of the share of outlets serviced. A further 95 new outlets were onboarded, expanding the active base by about 23% to 510 outlets. Observations on retail execution suggest that availability, assortment, visibility and regular servicing operate as interdependent elements. The findings indicate that outlet counts alone are an incomplete measure of territory performance, and that routine market mapping and updated outlet data can improve servicing consistency. The study is limited by its short duration, single territory and purposive sampling, so the findings are indicative rather than generalisable.

Keywords: General Trade, FMCG distribution, beat planning, market mapping, retail execution, assortment, consumer healthcare

1. Introduction

1.1 Research Context

The Fast-Moving Consumer Goods (FMCG) sector is one of the largest segments of the Indian economy and provides livelihoods to approximately three million people (India Brand Equity Foundation [IBEF], n.d.). Despite the growth of organised e-commerce and quick-commerce networks, a large share of consumer product transactions in India still takes place in traditional, unorganised retail. Ensuring physical availability at the neighbourhood store therefore remains central to brand performance. Consumer healthcare companies face a particularly demanding setting: their wellness lines must secure consistent placement across local pharmacies, dispensaries and general provision stores where shelf space is limited and competing brands are aggressive.

The distribution architecture is layered. Manufacturers move inventory through carry-forward agents to distributors and wholesalers, who in turn serve a large number of fragmented outlets. General Trade (GT) formats, such as standalone grocery stores (Kirana stores) and neighbourhood chemists, remain the main interface of this chain. For a brand owner, an outlet that is stocked, visible and visited regularly by field representatives is where distribution spending converts into consumer purchases.

Haleon India Pvt. Ltd. operates as an independent consumer healthcare company following its separation from GlaxoSmithKline (GSK) Consumer Healthcare. Its Indian portfolio includes oral health brands (Sensodyne, Polident), supplements (Centrum), digestive care (ENO), topical pain relief (Iodex) and respiratory care (Otrivin). Haleon's 2025 results report revenue of £11.03 billion and operating profit of £2.41 billion (Haleon, 2026a). The same report states that the company more than doubled its rural India distribution to 600,000 outlets and launched the ₹10 Centrum Recharge sachet (Haleon, 2026a), and in June 2026 the company announced an ambition to reach more than three million outlets in India by 2030 as part of accelerated rural distribution (Haleon, 2026b). Achieving that scale depends on disciplined execution along the territory beats assigned to field sales teams.

1.2 Problem Statement

Territory performance is often appraised using aggregate variables, such as the number of outlets visited or the number of new accounts added in a billing cycle. These metrics show geographic reach, but they do not show whether outlets are serviced at the right frequency, stocked with a relevant assortment of stock-keeping units (SKUs), or supported by point-of-sale materials (POS�) that encourage impulse purchase. An outlet that appears in the sales ledger but is rarely visited contributes little to revenue and leaves the category open to competitors. This study examines how outlet expansion, route coverage, servicing regularity and retail visibility operate together in one high-density urban territory.

1.3 Research Gap

The literature documents distribution channel logistics, sales force behaviour, assortment planning and shopper choice, but usually treats these as separate topics (Bonfrer et al., 2022; Briesch et al., 2009; Mukherjee & Basu, 2010). Field-level research on the day-to-day coordination of outlet onboarding, beat mapping, market mapping and order booking through automated sales systems within a single urban territory is scarce. This study addresses that gap through participant observation.

1.4 Research Objectives

The study pursued four objectives. The first and third produce counts; the second and fourth are descriptive and are addressed through field observation:

- *Outlet coverage expansion:* to identify and onboard new General Trade outlets through structured beat mapping and record the number added.
- *Route coverage:* to describe how availability checks and order booking through the sales force automation application are carried out across the assigned beats.
- *Servicing regularity:* to identify under-serviced outlets and servicing gaps in active beats through market mapping.
- *In-store retail execution:* to observe and document how assortment, POSM displays and stock availability relate to one another at the point of purchase.

2. Literature Review

2.1 Theoretical Foundations

Distribution channel theory. A manufacturer's market success depends on structural availability, delivery schedules, geographic reach and coordination among intermediaries (Kotler et al., 2022). In fragmented markets such as India, traditional trade outlets need frequent service cycles because storage space is small and out-of-stock situations arise quickly.

Beat planning and territory management. Territory models divide markets into routes, or beats, to make the best use of field time and avoid missed visits (Panda & Sahadev, 2012; Still et al., 2017). A well-designed beat system reduces transit delays, balances workloads and gives high-potential stores consistent attention.

Sales force effectiveness. This framework considers how well a sales team converts time and field opportunities into revenue through organised selling, active order tracking and consistent fulfilment (Still et al., 2017).

Relationship marketing. Long-term channel success depends on trust and responsiveness toward retailers rather than on short-term transactions alone (Kotler et al., 2022). In GT networks, retailers are channel partners whose recommendations are shaped by the reliability of the sales representatives who serve them.

Competitive forces. Applying Porter's (1980) framework to urban FMCG suggests intense rivalry among brands, high buyer power among store owners because switching costs are low, and a constant threat of substitutes. Execution at the point of sale therefore becomes a potential source of competitive advantage.

Market mapping. In this study, market mapping means auditing a physical route and cross-checking the storefronts found there against the company's active digital ledger. The audit helps identify unserved or under-serviced accounts that are formally part of the sales zone but do not receive regular distribution benefits.

2.2 Empirical Evidence

Earlier studies suggest that market reach should not be separated from the quality of retail execution. Bhoyar and Nagendra (2012) studied the distribution channels of two FMCG companies in two rural districts of Maharashtra and concluded that channel effectiveness depends on customer satisfaction and that the existing channels did not serve rural customers well. Mukherjee and Basu (2010), in a case on Nestlé India, described how turnover among distributors' salesmen and competition for retail shelf space made an aggressive market growth strategy difficult to implement, which shows the

importance of managing the field force that services outlets. On assortment, Briesch et al. (2009) found that SKU choices influence where consumers shop, and Simonson (1999) showed that how products are presented shapes buyer preferences. Bonfrer et al. (2022), in a systematic review of 178 studies on grocery retail formats, identified retailer factors such as location, assortment, pricing and promotion as main drivers of shopper choice among formats. Taken together, these studies indicate that coverage metrics need to be paired with assortment management

2.3 Conceptual Framework and Propositions

The framework in Figure 1 treats field execution as an interdependent chain: structured route planning leads to the identification of new and unserved outlets, which feeds onboarding, regular servicing and order booking; assortment and display then determine retail execution and, ultimately, market penetration. Three exploratory propositions guide the analysis:

- P1: Beat routing updates drive systematic store expansion.
- P2: Reach breadth and servicing frequency operate independently.
- P3: Assortment depth and visual presence interact dynamically.

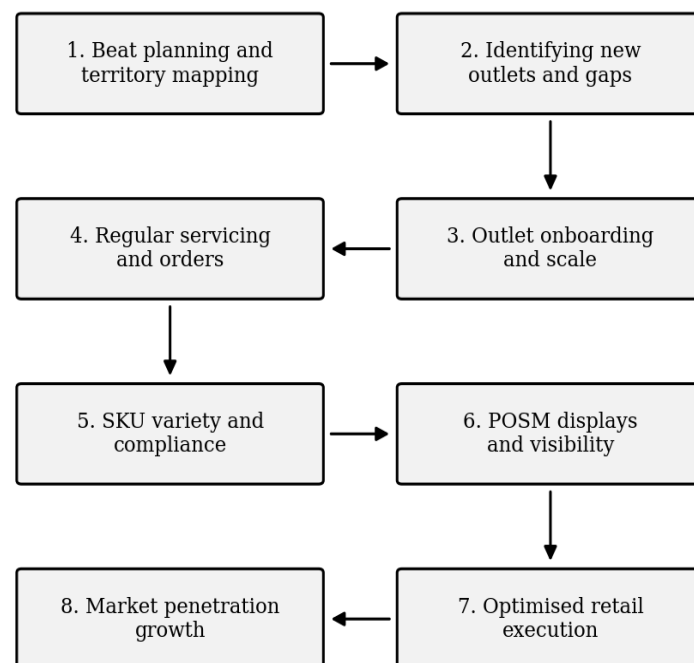


Figure 1. Conceptual framework mapping the field execution flow.

3. Methodology

3.1 Research Design

The project used an integrated descriptive, exploratory and participant-observation design. The descriptive component tracked and categorised outlet types, product availability and stock rotation practices across assigned routes. The exploratory component identified unserved market opportunities, routing errors and distribution issues. The investigator worked as a Sales Intern embedded in field operations, booking orders and interacting with store owners alongside regular field staff.

3.2 Setting and Scope

The study was carried out in the Kandivali retail belt of North Mumbai from 15 May to 15 July 2026. The micro-market is characterised by high residential density and a fragmented retail structure. Fieldwork covered only the General Trade channel of Haleon India Pvt. Ltd. and was conducted in coordination with four Area Sales In-charges (ASIs) and the Territory Sales Executive (TSE).

3.3 Sampling Strategy and Frame

Non-probability purposive sampling was used. The sampling frame comprised all active and potential GT retail points along the assigned beats, and the individual storefront was the unit of analysis. Field tracking covered 415 existing registered accounts across 24 routes, with stores assessed on category relevance, daily foot traffic, shelf availability and order history. The 95 new outlets identified and onboarded during the study are counted separately and are not part of the 415. Market mapping was carried out on the outlets reached during field visits and was not a census of all 415 outlets.

3.4 Project Execution Sequence

The project followed an 11-stage cycle, shown in Figure 2: zone familiarisation, beat route selection, structured store visits, new account identification, retailer interest assessment, digital order entry through the mobile application, SKU availability tracking, POSM implementation, route data cleaning, performance reporting to area managers and final beat adjustments.

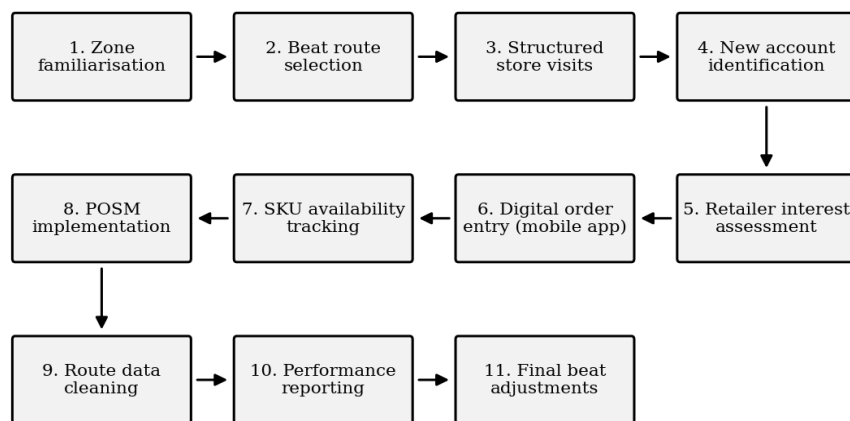


Figure 2. Chronological field operations sequence during the study.

3.5 Ethical Considerations

Store names, owner details and company-confidential information are not reproduced in this paper. Observations are reported at the level of routes, zones and themes for academic purposes only.

4. Results and Findings

Objectives 1 and 3 are addressed with the counts in Table 1. Objectives 2 and 4 are addressed through the qualitative observations in Section 4.2 and Section 5.2, and the stages through which they were carried out are shown in Figure 2.

4.1 Quantitative Tracking Outputs

Table 1 presents the quantitative outputs of field tracking. The 415 existing outlets across 24 beats average about 17.3 outlets per beat. During visits and market mapping, 28 outlets were identified as under-serviced. These were found while working the beats and were not the result of auditing every outlet, so 28 is the number of gaps observed and should not be read as a proportion of the 415; the true number of under-serviced outlets may be higher. Separately, 95 new outlets were onboarded, which adds about 23% (95 of 415) to the existing base and brings the active base to 510 outlets. In this paper an under-serviced outlet is one found to be going without regular servicing, identified through market mapping and through retailer reports of long service gaps (Table 2).

Table 1

Quantitative Field Tracking Outputs

Performance metric	Field result	Operational assessment note
Existing outlets tracked	415 accounts	Registered base across active routes

Performance metric	Field result	Operational assessment note
Active beats covered	24 routes	Averages 17.3 outlets per beat
New accounts onboarded	95 stores	In addition to the 415; about 23% expansion
Active base after onboarding	510 outlets	415 existing plus 95 new
Under-serviced gaps observed	28 stores	Among the 415; found during visits and market mapping, not a full audit

Note. Compiled from field tracking during the study period. The 28 gaps are observed counts, not a rate.

4.2 Qualitative Field Themes

Interactions with store owners and distributors revealed several recurring themes, summarised in Table 2. Onboarding capacity differed across zones. Several registered stores reported long service gaps during which competitor representatives took over shelf space. Master data on store names, phone numbers and coordinates were often outdated. Distributor delays caused temporary stockouts and smaller orders, and negotiations with store owners centred on margins, credit windows, local promotions and returns of damaged goods.

Table 2

Qualitative Field Themes

Operational theme	Core field observation
Zonal growth variations	Onboarding capacity varied across routes; Charkop showed high saturation, while Kandarpada and Hanuman Nagar offered clear expansion space.
Service frequency drops	Several registered stores reported long service gaps, and competitor representatives claimed shelf space during those intervals.
Database degradation	CRM master data frequently contained outdated store names, phone numbers and geographic coordinates.
Supply chain barriers	Fulfilment delays from local distributors caused temporary stockouts and reduced order sizes.
Trade term friction	Store owners focused negotiations on margins, credit windows, local promotional items and return terms for damaged goods.

Note. Based on interactions with store owners and field staff.

5. Discussion

5.1 Coverage Breadth versus Servicing Quality

The findings suggest that aggregate reach is not a reliable indicator of territory health. Field teams tracked 415 existing registered accounts, yet 28 outlets that went weeks without consistent coverage were found even though outlets were not audited exhaustively. A large footprint can therefore hide drops in service frequency, which is consistent with the chain in Figure 1, where servicing precedes assortment and visibility, and with channel literature emphasising servicing quality over raw outlet counts (Kotler et al., 2022). Long gaps between visits also give competitors an opening to claim limited counter space, as retailers reported.

5.2 Interdependent Retail Execution Pillars

Field observations suggest that availability, assortment depth, visual presentation and service consistency work as one system, as the later stages of Figure 1 imply. Introducing a new format such as the ₹10 Centrum Recharge sachet required retailer education on pricing, margins and target consumers before store owners agreed to hold stock. Securing an order did not guarantee success: a poorly placed product without clear POSM was unlikely to attract attention, while high visibility without adequate stock rotation produced empty shelves, which harmed retailer relationships and lost sales.

5.3 Assessment of Study Propositions

Table 3 compares the three propositions in Section 2.3 with the field evidence. Given the exploratory design, the assessments describe consistency with observations and do not constitute statistical tests.

Table 3

Assessment of Research Propositions

Research proposition	Field evidence	Assessment
P1: Beat routing updates drive systematic store expansion.	95 new GT accounts, about 23% of the existing 415, were audited and added to the active sales ledger.	Consistent with field counts
P2: Reach breadth and servicing frequency operate independently.	415 existing stores were recorded, yet 28 coverage gaps were observed during visits and mapping.	Consistent with field counts
P3: Assortment depth and visual presence interact dynamically.	Visual store checks indicated that SKU availability was shaped by display prominence.	Consistent with field observations

Note. Assessments are qualitative and based on a single territory.

5.4 Limitations

Several limitations qualify these findings. The study lasted two months and covered one territory, so results cannot be generalised to other markets. Purposive sampling and participant observation introduce the risk of observer bias. Market mapping was not a census of all 415 outlets, so the 28 under-serviced outlets are observed gaps and not a rate, and the true extent of under-servicing is unknown. The qualitative themes rest on informal conversations rather than a structured instrument. Objectives 2 and 4 are descriptive and rest on observation, so the paper reports no quantitative order booking or assortment measures; these would require access to sales force automation and stock data.

6. Conclusion and Recommendations

6.1 Core Conclusion

This field study suggests that aggregate outlet numbers do not reflect territory performance unless accounts are kept up to date, visited regularly and supported with shelf presence. Relying on raw outlet counts can create a false sense of security while masking service drops on individual routes. Sustainable retail growth requires field forces to balance new account acquisition with servicing regularity, and to keep core SKUs visible and available at the point of purchase.

6.2 Recommendations for Field Teams

To strengthen last-mile distribution in high-density urban markets, consumer healthcare sales teams should adopt five routines:

- *Run route audits:* carry out regular beat-by-beat market mapping to discover unserved accounts.
- *Clean core ledgers:* refresh the central database whenever a store changes name or location.
- *Minimise delivery gaps:* align order booking with actual distributor inventory to prevent stockouts.
- *Link displays with stock:* pair POSM deployment with core SKU availability targets.
- *Review beats regularly:* adjust route frequencies using field observations to match shifting demand.

6.3 Future Research Directions

Future studies should use sales force automation and stock-audit data to measure order booking rates and SKU availability directly, and should track territories over a longer period to assess how account performance changes after routine beat updates. They should also build quantitative models of the effect of fast delivery networks, such as quick-commerce platforms, on physical store volume shares in major metropolitan areas.

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