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How Does Kespro's Procurement in the EU Contribute to Their Overall Competitive Advantage in the Wholesale Sector

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ABSTRACT

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This thesis is based on the research of internal and external factors of Kespro Oy's procurement of meats, fruits, and vegetables from the European Union. The goal is to understand how these factors contribute to Kespro's competitive advantage in the wholesale sector.

The objective of this final project was to find out the key factors that create value for Kespro for its procurement in the EU. This thesis was executed based on qualitative research by conducting interviews with Kespro's purchasing department in an effort to understand the company's procurement processes.

Our theory is based on the supply chain activities of Kespro, including concepts such as logistics, procurement and negotiation processes. Furthermore, the research includes our findings on the current market situation regarding the impacts of Covid-19, the Ukraine conflict, and other current external factors, which have a significant impact on the procurement and wholesale.

The results show that there are three key figures that attribute value to Kespro from conducting procurement in the European Union. We have presented these findings in our conclusion and also provided concrete examples on which they are based upon.

Keywords: Supply chain, Procurement, Kespro, Wholesale

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Opinnäytetyömme perustuu Kespro Oy:n lihan, hedelmien ja vihannesten hankinnan sisäisten ja ulkoisten tekijöiden tutkimukseen Euroopan unionin alueella. Tavoitteena on ymmärtää, miten nämä tekijät lisäävät kilpailuetua Kesprolle tukkukaupan alalla.

Opinnäytetyön tavoitteena oli selvittää keskeiset tekijät, jotka luovat Kesprolle lisäarvoa sen EU:n hankinnassa. Tämä opinnäytetyö tehtiin laadulliseen tutkimukseen perustuen haastattelemalla Kespron hankintaosastoa, jotta ymmärtäisimme yrityksen hankintaprosessia.

Teoriamme perustuu Kespron toimitusketjutoimintoihin, ja se sisältää konsepteja kuten logistiikka-, hankinta- ja neuvotteluprosessit. Lisäksi tutkimus sisältää havaintoja nykyisestä markkinatilanteesta Covid-19:n, Ukrainan konfliktin ja muiden ajankohtaisten ulkoisten tekijöiden vaikutuksista, joilla on merkittävä vaikutus hankintaan ja tukkukauppaan.

Tuloksien kautta havainnoimme, että Kesprolla on kolme tärkeää käsitettä, jotka luovat arvoa yritykselle EU:n hankinnassa. Olemme esittäneet nämä havainnot johtopäätöksessämme ja toimittaneet myös konkreettisia esimerkkejä, joihin ne perustuvat.

Keywords: Toimitusketju, Hankinta, Kespro, Tukkukauppa

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1 INTRODUCTION

In this thesis we will analyse the procurement process of Kespro and its impact on their competitive advantage in the field of wholesale. Since Kespro has almost a thousand suppliers all over the world with tens of thousands of products in their warehouses, we will specify this thesis on the suppliers within the European Union, focusing on the procurement of meats, fruits, and vegetables.

Analysing this process requires us to deepen our knowledge on Kespro's supply chain, particularly on the purchasing team and its functions, logistical aspects, and warehouse management. For this information we have conducted multiple interviews with Kespro's managers in these particular fields. Analysing these compartments will assist us to indicate the factors that have an impact on their competitive advantage, as well as help us to point out ideas for improvement. The influence of Covid-19 and the current situation with Ukraine and Russia will be also taken into consideration in our research, as their impact has also affected the supply chain of Kespro.

The purpose of this thesis is to find out if Kespro's procurement and supply chain affects their competitive advantage, how it occurs, and how it can be improved. Through a SWOT analysis we will also conclude the current strengths and weaknesses, and the possible opportunities and threats within their supply chain and procurement process.

This thesis consists of the introduction to Kespro and our data acquisition, theoretics on the supply chain, and our own conclusion and final analyses. The appendices at the end will include the interviews we have conducted with Kespro's credited personnel, which are translated from Finnish to English. As we have signed the non-disclosure agreements of Kesko Oyj, this thesis will include classified information that cannot be published.

2 KESPRO

2.1 Kespro as a Company

Kespro is part of the K Groups grocery trade division, which is responsible for the hospitality and foodservice industry. The company's role is to act as a partner in providing its customers with procurement and logistical services. Currently the firm operates fourteen cash & carries around Finland with logistical capability of delivering products on site, to every municipality in the country. The company's main operations are conducted from its warehouse facility in Hakkila. The product range includes over 50,000 products with roughly around 40% of them coming from foreign markets (Kespro, 2022). The products can be categorized into eight separate categories: processed foods, frozen foods, fruits and vegetables, alcohols, non-food (including household items such as dishes and plates), dairy, canned foods, and meats (such as poultry). In addition to this, the company supports small-scale producers, which enables these manufacturers to provide their products to the mass foodservice market. (Figure 1).



Figure 1: Kespro's Procurement Organizational Structure (Kespro 2022)

2.2 Business Model

Kespro's warehouses operate in the field of business-to-business, also known as B-to-B (B2B). A company that operates under this business model conducts transactions with other

business's, rather than between individual consumers. In general, the quantity of capital being exchanged between each business transaction is significantly larger than those made by individual consumers. Also, most often the sheer volume of product being sold in a single purchase is notably greater, than those in conventional supermarkets.

Business-to-business transactions are commonplace for companies operating in the wholesale sector and manufacturing. Most transactions require planning in order for them to be successful. This means that businesses often rely on their company's account management personnel to establish business client relationships. Kespro has multiple key account managers at each of their fourteen cash & carry sites, who are in charge of establishing client contracts and maintaining customer relations. In these contracts, items such as product prices, delivery options, and foodservice appointments are negotiated. All client contracts are individually tailored to the customer's specific needs and are renewed on a fiscal basis.

3 RESEARCH METHODS

3.1 Research Methods and Research Process

For the purpose of this thesis, we have been able to gain inside information of Kespro's operations through interviews from Purchasing and Sales Director responsible for Kespro's fresh product groups; Area Director of Kesko's Oulu division; Customer Service Manager; Development Manager; Purchasing and Sales Manager of Fruits and Vegetables; Purchasing and Sales Manager of Meats; and Ross Nicolson, Purchaser of Kespro's Oulu division and one of the authors of this thesis. The theoretical parts for this thesis are based on books, articles and internet publications that we found useful and relevant for our research.

We came up with this topic by conducting numerous meetings and discussions with our contact person at Kespro, and the Head of our Degree Programme. Initially, our main goal for this thesis was to examine the procurement process of Kespro, generally focusing on the procurement of food products from abroad. Together we narrowed down our research topic to a more specific theme, concentrating on just a few products from Kespro's vast product selection, thus specifying on the procurement of fruits, vegetables, and meats only. We also changed our scale from procurement from abroad to procurement from just the European Union. This helped us narrow down our research and achieve more accurate results. We also wanted to take into consideration key factors that form Kespro's competitive advantage in the wholesale sector.

Our research process includes interviews that we conducted to members of Kespro's sales and purchasing teams. Our original plan was to distribute questionnaires to Kespro's staff, with the same template for each subject of the survey. We resulted in using individual and personalized interviews as our qualitative research method instead of the questionnaires, since we thought we would get more qualitative answers by interviewing several people separately with questions that are tailored for their specific field of expertise. Furthermore, a survey would have been distributed to around 20-30 people, and we are unsure what percentage would have answered us. We came up with the questions for the interviews after talking to the Purchasing and Sales Director of Kespro about our topic in general and what different aspects we need to take into consideration. After these discussions, as well as conducting our own research

through literary and internet sources, we came up with questions that would be helpful for us to achieve our research and ultimately help us reach the conclusion of this thesis.

3.2 Data Acquisition

The data acquisition of Kespro consists of their own data that they have collected through their reporting systems. The systems used to collect pricing and market data is through Mintec Analytics, which is a provider of global commodity price data for the food industry, as well as purchasing price indexes. The suppliers provide their own market reviews for Kespro. Kespro also provides trainings, participate in trade fairs and expositions, as well as specialize in best practice to upkeep with the latest market information. Other forms of data, such as the stock exchange price of salmon, is gathered through public information. (Kespro, 2022)

4 THEORETICS

4.1 Procurement

Purchasing is the act of buying products and services on behalf of the company. It is considered to be a key component of effective inventory management, due to constant monitoring of existing stock supplies. By utilizing the purchasing system, a company is able to reduce supply costs, administrative costs, reduce the length of a purchase cycle and reduce the risk of a stock-out. The purchasing department also plays a notable role in controlling a company's cash outflows, by ensuring that only necessary purchases are conducted at reasonable prices (Bourlakis, 2008).

Large corporations utilize software, such as SAP and Oracle in order for them to create a centralized system for their business. The software contains large quantities of fully integrated modules that cover almost all aspects of business management. This in turn makes it possible for different departments to access and share data efficiently. By integrating the system as part of the purchasing department, it provides the employees with access to necessary data needed, in order to complete transactions and create expenditure reports (SAP, 2022).

Kespro has a team of roughly around fifty people who are in charge of the company's external purchasing. The department oversees all six product categories and ensures that product is available for its network of warehouses across Finland. In this text we shall be focusing solely on the purchasing activities of two separate product categories. These include the fruit and vegetables department and the meat department (Kespro, 2022).

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also be noted that price stability in the EU and the aspect of competitive pricing through large numbers of suppliers, makes the EU an attractive market for wholesalers. (Appendix 3).

4.4 Logistics

Logistics is the positioning of resources ensuring that materials, people, operational capacity and information are in the right place at the right time in the right quantity. Quality and cost have to be taken into consideration throughout the whole process, influencing the entire supply chain (Branch, 2006).

Kespro currently operates most of its logistic activities from its two main distribution centers located in Hakkila and Viinikankaari. The distribution center located in Viinikankaari is specifically used for the storage and distribution of frozen goods. The two centers cater for all fourteen cash & carry sites in Kespro's network, as well as provide onsite deliveries to customers all over Finland. This is achieved through Kesko's parent company Kesko Logistics, which operates one of the largest and most extensive logistics networks in the whole Finland (Kesko Logistics, 2022). When Kespro's purchasing and sales director Nora Hortling was asked "what is Kespro's main competitive advantage?", she replied by stating the extensive delivery network and the frequencies of deliveries that the company offers to its customers, proved to be the key drivers (Hortling, 2022).

Kesko Logistics has facilities located in eight separate locations across Finland, from which they make roughly 3500 daily onsite deliveries. Kesko Logistics also oversees and imports deliveries to Finland from over 100 countries, including all other European Union member states (Kesko Logistics, 2022). The in-house fulfillment method that Kespro utilizes provides value for the company in numerous ways. While it generates a larger direct overhead cost for the firm, it eliminates the need to fall back on third party logistics service providers. This in turn means that the company saves money on fulfillment fees, shipping material costs, inventory receiving fees, and storage fees. In addition, Kespro is able to maintain complete control over its order fulfillment process. This is important when dealing with risk management, due to the rapid response time advantage that it gives when faced with issues regarding the supply-chain (Fernie et al., 2008).

4.5 Market Situation

4.5.1 Trends

Since 2016, the K-Group has commissioned a series of studies on food trends, which focuses on trends in Finnish consumer behaviour and changes in the food phenomena. Extensive surveys have been conducted in 2016, 2018 and 2020. The review of trends and changes in the survey of 2021 is based on expert interviews, a consumer survey and analysis of sales data.

There are five major trends that stood out in the consumer survey: 61% of Finnish consumers focus on wellbeing, of which 37% concentrates on holistic wellbeing and 24% on customized wellbeing. This category focuses on a diet that treats and prevents health issues and creates a more diverse food habit. Products included in this trend are vegetables (such as peppers, tomatoes, cucumbers, and salads), non-alcoholic beers, and mixed berries. (Katajajuuri et al., 2021).

60% of Finnish consumers focus on conscious consumption, of which 38% concentrate on considered consumption and 22% on clear-conscious choices. This trend has grown the demand on Finnish foods, and consumers have appreciated more local producers for ethical reasons and for the lower prices. The demand for local and small producers has risen by 18% since 2020. Other products included in this trend are vegetables (such as broccoli +21% since 2020), eggs (+28%), and milk replacements (such as oat milk +31%). (Katajajuuri et al., 2021).

29% of consumers want to improve on their home cooking: remote work and studying at home during lockdowns has influenced many Finns to experiment new styles and techniques of cooking. Products included in this trend are international produce, such as foreign spices (+21% since 2020), dark roasted coffee beans (+39%), and olive oils (+28%). (Katajajuuri et al., 2021).

25% of consumers focus on foods that create experiences and concentrate on their aesthetical aspects. Visual food experiences have grown to be as important as the taste of the food, and the star of the meal is the story behind the main ingredient or product. Products included in this trend are frozen mussels (+60% since 2020), bakery products (such as macarons, +21%) and edible flowers (+17%). (Katajajuuri et al., 2021).

20% of consumers choose foods that require little or no preparing and are essentially effortless. Since the need for remote work and studies have lowered significantly, the need for time saving solutions is rising. This has created a rise in ready-made meals (+17% since 2020), online stores (+55%), and on-the-go snacks (+23%). (Katajajuuri et al., 2021).

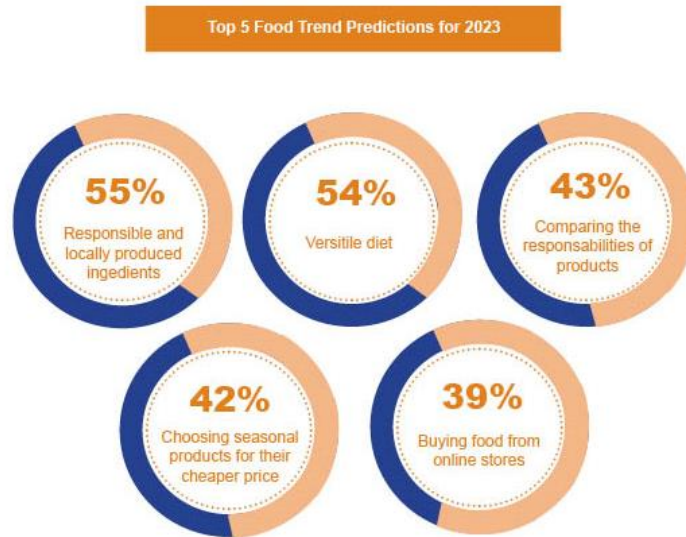


Figure 5: Top 5 Food Trend Predictions for 2023 (Kespro 2022)

According to Kespro, the availability of skilled workforce in restaurants is playing a larger role in the consumption of restaurant foods than other individual consumer trends. This directs the customers of Kespro more towards pre-prepared and processed products, such as ready-made salad mixes, cooked meats and vegetables and ready-to-eat meals (appendix 3).

4.5.2 Product Availability

4.5.2.1 Kespro's Product Selection and Availability

Kespro's customers mainly determine their product selections. New products are constantly introduced to the selection from the initiative of purchasing teams, but their warehouse's wide product range already covers the needs of their clients, even their most demanding customers. However, if new products are needed, the purchasing team will first check the selection of current suppliers. If a product request requires the search for a new supplier, they will look for potential suppliers and their required responsibility and product safety certificates before further discussions.

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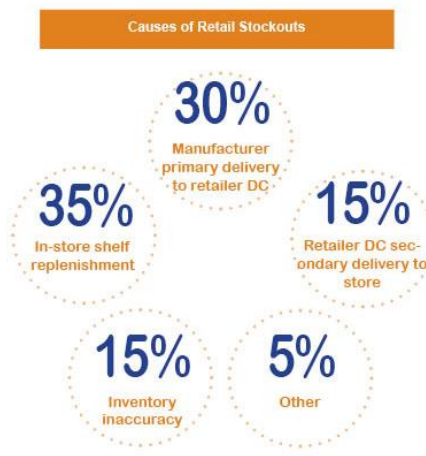
by shelf replenishments in the store, and 15% from the regional distribution centre (DC) to the store. (Bourlakis et al., 2008)



Figure 6: Five Main Reactions by Consumers to a Product Stock-out (Bourlakis et al., 2008)

It is important to note, that the stock-out theory is most relevant to the consumers for whom it is easy to switch stores. For B2B customers in foodservice, switching stores is much more complex, as the goods are mostly delivered to their location and they might not have an active contract with another wholesaler (Hortling, 2022).

Problems occurring when procuring products from the EU are similar to those when procuring products from Finland. Typically, the challenges raise during market availability situations: in imported products, longer delivery routes and delivery times eat up the shelf life of fresh products. However, when this is taken into consideration while planning demands and trends, it is not necessarily considered as a problem (appendix 3).



4.5.3 COVID-19

The first wave of the COVID-19 pandemic in the early 2020 did not disrupt the European food systems in a major way; instead, it highlighted some specific challenges concerning each stage in the food chain from food production and distribution to consumption. These challenges had an impact to the consumers on different food trends arising from the pandemic (Vittuari et al., 2021).

Food production at all stages became difficult due to the newly compulsory safety measures in the Spring of 2020. Limitation of transportation and transport lines combined with the closing of borders caused food production to suffer. Production workers could not reach their farms, prolonging the harvest, catch, and management of seasonal products, and the daily work in the fields were interrupted by mandatory social distancing and the enforced use of personal protective equipment. The rising trend of online shopping and takeaway meals resulted in a structural transformation of both small and medium food initiatives, which changed the relationship between consumers and sales channels (Vittuari et al., 2021). However, these changes have mainly affected the B2C market in Kespro (Kespro, 2022).

COVID-19 has inspired numerous consumer trends that have affected the food supply chain. From a consumer's perspective, an individual would have more time available because of the lockdowns, causing them to focus more on home cooking and baking. (Bernstein, 2020). Consumers were motivated to maintain their physical and mental health, all while being cost-effective in their purchases due to the uncertain economic situation. (Accenture,2020). The economic uncertainty also inspired consumers to acquire non-perishable goods, including flour, pasta, yeast, and canned food (Rogers, 2020). Subsequently a new interest in food sustainability, healthier diets, and the origin of food occurred, leading to new recipe trends, online cooking classes, and a more detailed ingredient selection (Cohen, 2020; Rodriguez-Pérez et al., 2020). Demand for home delivery options, usually through digital applications, and short supply chains was noticed in several countries (Hobbs, 2020). Consumers favoured local small-scale suppliers, because they were thought to be connected with higher safety standards as well as better food quality (Rizou et al., 2020).

Even though COVID-19 itself was not responsible for a systematic failure in the supply chain, it influenced a change towards localized and sustainable food production systems. Consumers mind-

sets were shifted more to a “think globally act locally” way of thinking, supporting more sustainable and local food suppliers and farmers (Vittuari et al., 2021).

With the availability of fruits and vegetables of Kespro, the first wave of the pandemic caused uncertainty in the market, but there were virtually no major availability or price challenges after the summer of 2020. In certain fresh product groups, the rapidly growing post-pandemic demand in Central and Southern Europe has caused momentary availability challenges (appendix 3).

4.5.4 Ukraine

Ukraine’s main exports to the EU are wheat, corn and sunflower oil. In fact, Russia and Ukraine are often referred to as the “breadbasket of Europe”: they are the main producers and exporters of grains such as wheat and maize as well as many vegetable oils around the world. The current Russian invasion in Ukraine is expected to cause further problems in the global food supply - even before the start of the war in February 2022, many countries were struggling to access sufficient food supplies caused by the economic depression triggered by COVID-19. About 760 million people faced hunger in 2020, and this number is expected to rise in 2022 (United Nations, 2021). Disruption in Ukraine’s supply chain and the limited availability of food producers will have a harmful effect on their important position in EU’s food supply (Emediegwu, 2022).

The workforce needed on the farms and food productions has reduced significantly due to the war conditions and emigrations. Additionally, farms and storage facilities have been destructed, and many tractors have been repurposed as armoured vehicles. All of this contributes to the reduction of food production (Bloomberg, 2022). Reduction of food production in Ukraine adds up to low or no exports, damaging the economy of Ukraine and the quality of life of many Ukrainians (Emediegwu, 2022).

Stumbling food supply and rising food prices will make an almost direct effect on all consumers in the EU, especially low-income families. A shift in consumption patterns towards cheaper food substitutes, such as cassava, will be probable. Rising fuel prices and other global factors are also affecting the supply chains, especially considering the logistical aspects. Expectations on the duration of the war and the possibility of a global food price contagion will affect the severity of the food substitutes. As an example, some consumers might continue buying wheat even though the

price is high, if they expect that the war will end soon, and the prices will return to their pre-war levels (Ruokavirasto, 2022).

Due to the unavailability of certain food products, some recipes of ready-made foods have to be changed, so that certain ingredients need to be removed or replaced by other similar products. This causes problems not only in the sourcing or replacement ingredients, but also in the change of nutritional values of the food packages. The nutritional information must be reported, especially if the substituted ingredient significantly changes the nutritional content of the product (Kespro, 2022).

For Kespro's fruits and vegetables category, the crisis in Ukraine has had a bigger impact on domestic summer labor, which as a consequence has a wide-ranging effect on the rising domestic prices. In general, there are some delays in imported fresh products, especially for products coming in large containers, as all European docs are full of containers going to Russia. Ukraine is a major agricultural country, so the effects are very diverse and affect almost all product groups. For example, a significant number of broilers produced in the EU come from Ukraine. Alternatives for the substitution of the country of origin for this demand have to be found (appendix 3).

4.5.5 Other External Factors

Other current external factors affecting procurement from the EU are several natural peculiarities occurring in parts of Europe and the Mediterranean area.

Quality and quantity problems concerning the availability of iceberg and romaine lettuce have been affected by heavy rainfall and snowfall in Spain and the widespread sandstorm from the Sahara affecting Southern Europe. This also affected the availability of processed salads. Availability problems for Spanish tomatoes exist for the same reason. The Dutch season for vegetables is just beginning, but as there is currently more demand than there is harvest, Kespro is relying on three different countries of origin for imported tomatoes (Spain, Morocco, and the Netherlands). The poor availability of tomatoes reflects strongly on the availability of processed tomatoes from all manufacturers (Kespro, 2022).

The Menu-brand potatoes (peeled, cooked, and raw chopped potatoes) are currently suffering from a shortage of domestic raw materials. As a result, batches of potatoes will

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of Ukraine. Since production is still limited but will not be stopped, substitutions or shortages are not expected to be prolonged (Best, 2022).

Possible changes in consumption patterns are expected, for example for food substitutes. Cassava, which is an edible root, is already used in the Americas and Africa as a substitute for potatoes and other root vegetables.

External factors regarding the procurement of fruits, meats and vegetables are unavoidable, but can be solved by effective risk management. Even though seasonal weather disruptions can be predicted, their effects are uncertain. This calls for quick reaction time from procurement teams and logistics, as well as having multiple options for suppliers in the EU. A shortage of strawberries occurring in Finland in the summer of 2021 called for a rapid change in the supply chain, having the sourcing team rely on suppliers from the EU, for example from Spain.

5 CONCLUSION

5.1 Research Conclusion

Through our extensive research we have managed to accomplish what we set out to achieve. Our findings show that there are three key concepts that prove to create value for Kespro, through its procurement in the EU. We have come to this conclusion through conducting various interviews with Kespro's employees from numerous departments and analyzing key data given to us by Kespro's purchasing team.

The first value proposition is achieved by purchasing products from cheaper markets within the EU. Lower labor and manufacturing costs enable Kespro to purchase products from foreign suppliers for a significantly cheaper price than from the domestic market. This provides the wholesaler with a more competitive offering of products, as well as a larger number of suppliers, which in turn enables competitive pricing.

The second value proposition is gained through the EU's extensive supplier and product offering. The markets within the EU enable wholesalers such as Kespro, to provide their customers with a wider range of products, superior quality, and the ability to establish new markets.

The third and final value proposition is created as a result of external factors. This can be observed for example, when dealing with fresh produce. Due to unfavorable weather conditions, it can cause a stock-outs in the domestic market due to poor harvest conditions. It is in these types of situations Kespro benefits from procurement in foreign markets, as it improves the company's risk management.

5.2 SWOT Analysis

A SWOT (strengths, weaknesses, opportunities, and threats) analysis is a template used to assess a business's competitive performance in the market, as well as a particular segment of the business. It can also prove to be helpful when conducting strategic planning, as it evaluates external and internal factors in the present and future. All data used in the making of a SWOT analysis is

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sales of their own product make Menu. Kespro's own product make is often the more affordable choice and it provides the wholesaler with strong margins.

Threats are factors that could potentially be harmful to Kespro's business operations and their competitive advantage. Kespro has to take into consideration external factors such as the current problem with inflation, which causes the prices of products go up, and eventually leading to customers buying less. The current crisis in Ukraine and Russia, as well as the aftermath of Covid-19 will cause problems with the whole supply chain, from production to transport to end consumers.



Production of wheat and poultry is stumbling in Ukraine, delaying supplies and causing low stocks of products in the warehouses. Kespro has to find an alternative supplier in the EU, before shortages occur and prices go up, and potential replacements need to be found.

Figure 7: SWOT Analysis

5.3 Reflection

The three concepts for value proposition are what we believe provides Kespro with a competitive advantage and helps create value for the company as a whole. Based on these findings the purchasing team should further strengthen its partnerships with its foreign suppliers in the eurozone, due to uncertainty caused by geopolitical tension in eastern Europe. By establishing strong links with suppliers from this region, Kespro is able to minimize the risk of stock shortages and further improve its risk management in the supply chain. Furthermore, with inflation further

increasing and the price of food and other consumer goods quickly rising, businesses need to come up with solutions on how to cut costs. The domestic market prices can prove to be too expensive for some of Kespro's customer base, with profit margins being so slim to begin with in the food industry. Therefore, wholesalers should focus their efforts on importing more produce from other countries in the European Union. This can be achieved by investing more capital into a larger fulfillment center and improving network connectivity in Western Europe. With these steps, Kespro has the ability to further strengthen its positions as the leading wholesaler in the Finnish market.

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Interviews:

- Purchasing and Sales Director, Helsinki. Interview 4.4.2022. In author's possession. (Appendix 1).
- Area Director, Kespro, Oulu. Interview 31.3.2022. In author's possession. (Appendix 2).
- Customer Service Manager, Kespro, Oulu. Interview 31.3.2022. In author's possession. (Appendix 2).
- Development Manager, Kespro, Helsinki. Interview 1.5.2022. In author's possession. (Appendix 3).

- Purchasing and Sales Manager of Meats, Kespro, Helsinki. Interview 1.5.2022. In author's possession. (Appendix 4).
- Purchasing and Sales Manager of Fruits and Vegetables, Kespro, Helsinki. Interview 1.5.2022. In author's possession. (Appendix 4).

APPENDICES

APPENDICES

Thesis Interview for Purchasing and Sales Director, Appendix 1

Thesis Interview for Area Director and Customer Service Manager, Appendix 2

Thesis Interview for Development Manager, Appendix 3

Thesis Interview for Purchasing and Sales Manager of Meats and Purchasing and Sales Manager of Fruits and Vegetables, Appendix 4