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Technology is helping retailers make fundamental changes to their operations

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PROGRESSIVE GROCER

January 2016 · Volume 10 Number 1 · Rs 100 · www.indiaretailing.com

INDIA EDITION

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CREATING BENCHMARKS IN SUSTAINABILITY & SUPPLY CHAIN

"We are helping small retailers become more competitive and transforming farmers, small manufacturers and women-owned businesses"

– Krish Iyer

President and CEO, Walmart India



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 Correspondents: **Roshna Chandran**
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General Manager - Administration: **Rajeev Mehandru**

Subscription

Asst. Manager-Subscriptions: **Kiran Rawat**

ADVERTISING**Business Head**

Rakesh Gambhir, Convenor, India Food Forum
 rakeshgambhir@imagesgroup.in
 Mob: +91 9910001375

Lokesh Arora, Vice President
 lokesharora@imagesgroup.in
 Mob: +91 9999033612

DELHI **Ekta Roy**, Manager

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FOR ADVERTISING QUERIES, PLEASE WRITE TO salesfood@imagesgroup.in

CONSUMER CONNECT**Anil Nagar, Vice President**

anilnagar@imagesgroup.in, Mob.: +91 9811333099

Membership Team: Priti Kapil**R. P. Singh**

Sarika Gautam

Priyanka Sagar

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India's Food and Grocery Retail market offers one of the largest opportunity areas for business. The F&G category accounts for about 57% of the total retail market in India. There are an estimated 8-9 million food & grocery stores (including local kirana shops, hawkers etc.) in the country.

Images Research finds that the penetration of modern organised retail in food is currently one of the lowest at 1.6 per cent. However, this is also expected to change dramatically over the next decade as organised retailers penetrate the markets deeper. By 2025, organised retail is expected to capture at least 3.2% of the food & grocery market and be worth INR 340,000 crore, growing at a CAGR of 22.5% from current levels.

While the food & grocery category will continue to grow at about 13-14% per annum over the next decade, food & grocery retail is expected to dominate the market with more than 50% share of the overall retail market in the foreseeable future.

Going forward, local kirana stores and street hawkers will however continue to dominate the food & grocery market with a 90% plus share, even in 2025. The unorganised, organised and online players will co-exist in the Indian retail ecosystem and will expand the market for each other, as all have unique strengths and the sector is large enough to accommodate all participants. It is expected that unique partnership models will emerge as the retail market matures and this partnership will further push the sector's growth.



Amitabh Taneja
 Editor-in-Chief

All feedback welcome at editorpgindia@imagesgroup.in

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Printed & published by S P Taneja on behalf of Images Multimedia Pvt. Ltd. Printed at Aarvee Printers Pvt. Ltd., B-235, Naraina Industrial Area, Phase -1, New Delhi 110028 and published by S P Taneja from S-21 Okhla Industrial Area Phase – 2, New Delhi.110020 Editor : Amitabh Taneja

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Registered Office: S 21, Okhla Industrial Area, Phase II, New Delhi 110020,

Ph: +91-11-40525000, **Fax:** +91-11-40525001

Email: info@imagesgroup.in, **Web:** www.imagesgroup.in

Mumbai: 1st Floor, Panchal Iron Works, Plot No. 111 / 3, Marol Co-Operative Industrial Estate, Marol, Andheri (East), Mumbai - 400 059,
Ph: +91-22-28508070 / 71, **Fax:** +91-22-28508072

Bengaluru: 523, 7th Cross, 10th Main, (Jeevanbhima Nagar Main Road), HAL 3rd Stage, Bengaluru 560 075. **Ph:** +91-80-41255172/41750595/96, **Fax:** +91-80-41255182

Kolkata: 30-B, Anil Roy Road, Ground Floor, Kolkata 700 029, **Ph:** + 91-33-40080480,
Fax: +91-33-40080440



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Technology-driven profits

Today, another round of technological possibilities are coming to the fore, enabling retailers to make fundamental changes to their operations. A lot of it involves a new approach based on technology

By Alagu Balaraman

The Indian retail industry has been struggling with a variety of problems. First, there is the challenge of the very high cost of infrastructure. To offset this it is essential to maximise sales for every square foot of space taken and invested in. While malls are getting fancier and more engaging, winning footfalls is not necessarily translating to increasing sales. This is dependent on both engaging the customer, as well as providing a strong value proposition to get customers to buy. We need to have the right products, effectively engage the short attention span of customers, get the pricing just right and have great service. If we step back a little, it is clearly an optimisation problem coupled with a customer engagement one.

Globally, the retail industry hit upon a formula in the 1940s. It involved shifting from serving a customer over a counter to a self-service model and providing them with shopping carts. Since then, there has been little change from that winning formula until the era of e-commerce about 15 years ago. India has been rapidly assimilating that model. Today, another round of technological possibilities are coming to the fore, enabling retailers to make fundamental changes to their operations. A lot of it involves a new approach based on technology.

Aren't people cheaper?

At first, it seems counter intuitive. Do we need to deploy more technology in a country where we have many people looking for jobs? Aren't salaries low

enough to allow retailers in India to work with a more people-intensive model?

A look at manufacturing might explain a different view. In the next five years, the country that will have the largest number of robots in the world is China. The same China that became the manufacturing hub of the world based on low cost labour is rapidly replacing people with robots. This shift is being driven, in part, by an increase in labour costs and a simultaneous drop in the capital cost of robots. Additionally, there is a change in the demand pattern of customers. Customers in developed countries, that form the main market for China, are asking more for customised goods and the demand for mass produced standardised products is starting to shrink. Making customised goods at scale requires automation, where a robot can be programmed to receive the unique specifications and tailor the product exactly as required. It needs no practice nor will it complain.

The situation in Indian retail is not very different. On the one hand, we have a pressure on wages for skilled staff. As the customer evolves, so too must the people who work in the industry. Simply putting warm bodies in stores will not be effective and is, in fact, counter productive. Couple this with dramatic advances in technology and the retail firms that ignore this development will suffer. This shift from a labour intensive model to an automated one is exactly what the Indian IT services industry is grappling with. As competition starts using automated tools to do what Indian companies were accustomed to putting together a team to do, cost structures and performance expectations are shifting business away from India.

In retail, brand and product proliferation are leading to increased complexity. At the same time, the pace of change has also increased and product life cycles are shrinking. Addressing these conditions requires a good mix of technology and people skills. The good news is that much of these are available today. The danger is that companies that are struggling with today's problems will not evolve fast enough leaving the competitive space open for new entrants.

People don't optimise well

The retail industry is a bit like the stock market. Retailers make punts on which brands and SKUs will sell when the customer walks in through the door. Retailers neither make nor consume. So, it is essentially a matching of what the consumer wants and is willing to pay for, with what is available and will give a good margin. As mentioned earlier, this is an optimisation problem. Like most other optimisation problems, people don't do a good

job at it. It becomes really difficult when there is an increase in scale or if things are changing fast. At that time, experience and judgement start to fail. Today, retail faces both of these complicating factors. There is an expansion in the number of stores and product proliferation. At the same time, there is a faster pace of change.

Last month, I have already written about the challenge of forecasting and replenishment. These are core operating processes for any retailer. Today there are powerful tools and methods available to support these processes and have been proven to work better than human judgement. Here, we will look at other areas where technology has stepped in to raise the bar and is helping deliver better profits.

In a recent experiment in the US, we had deployed a technology to track shopper movement across aisles in a specific department. The outcome of the study showed that most shoppers were entering the department, but walking through a single aisle and spending less than five minutes in that department. About 24% were walking through two of the aisles and spending about 20 minutes. Less than 10% of the shoppers were walking through three aisles and spending 60 minutes shopping. It also showed that more than 25% of

The situation in Indian retail is not very different. On the one hand, we have a pressure on wages for skilled staff. As the customer evolves, so too must the people who work in the industry. Simply putting warm bodies in stores will not be effective and is, in fact, counter productive



“We propose to open 49 more Walmart clubs in the next 4-5 years”

KRISH IYER, PRESIDENT AND CEO, WALMART INDIA, SPEAKS TO PROGRESSIVE GROCER ABOUT HOW HIS COMPANY IS BUILDING A WORLD CLASS OPERATION IN THE CASH & CARRY BUSINESS, BRINGING GLOBAL EXPERTISE AND CONTRIBUTING TO THE SUCCESS OF ITS MEMBERS



Krish Iyer

President and CEO, Walmart India



What do you make of the prospects and opportunities for the cash-and-carry business in India?

There is a lot of focus in India today on the fast-growing retail/wholesale sector. Experts see it as India's next big opportunity in terms of investment, employment, supply chain growth and lifestyle changes. Through the last two decades, economic liberalisation in India has opened up new avenues for every economic class, albeit in varying degrees. Clearly, there is no stopping India's newly awakened consuming class, whatever be the level of consumption. This change is not limited only to the rich and well-to-do. Down the income pyramid, changes are equally astounding. Who would have thought that mobile phones, once considered toys for the rich, will grow at such a phenomenal rate! As per an industry estimate, India's retail market is expected to cross US\$ 1.3 trillion by 2020 from the current market size of US\$ 500 billion. The penetration of traditional trade is at 92% in the country, making India an extremely attractive market for organised retail industry to service traditional retail and also the end-consumers. At the policy level also, given the focus on 'Make in India', it is imperative that retail as industry should be growing in the country because this economic growth will be driven by domestic consumption.

How do you look at the role of Walmart India in strengthening the retail eco-system and cash-and-carry trade in the country?

As you may be aware that Walmart India is currently operating B2B cash & carry business in the country and currently we have 21 membership clubs in nine states and plan for another 49 clubs by 2020, taking the total number to 70. These clubs are fully omni-channel, providing in-store experience to our members as well as serving our members through B2B e-commerce option. Through our operations in India, we're proud to be enabling the small businesses (kiranas & other businesses) to succeed and living our core mission of 'Saving people money,

so they can live better' every day by providing high quality food and safe merchandise at everyday low prices (EDLP), under one roof.

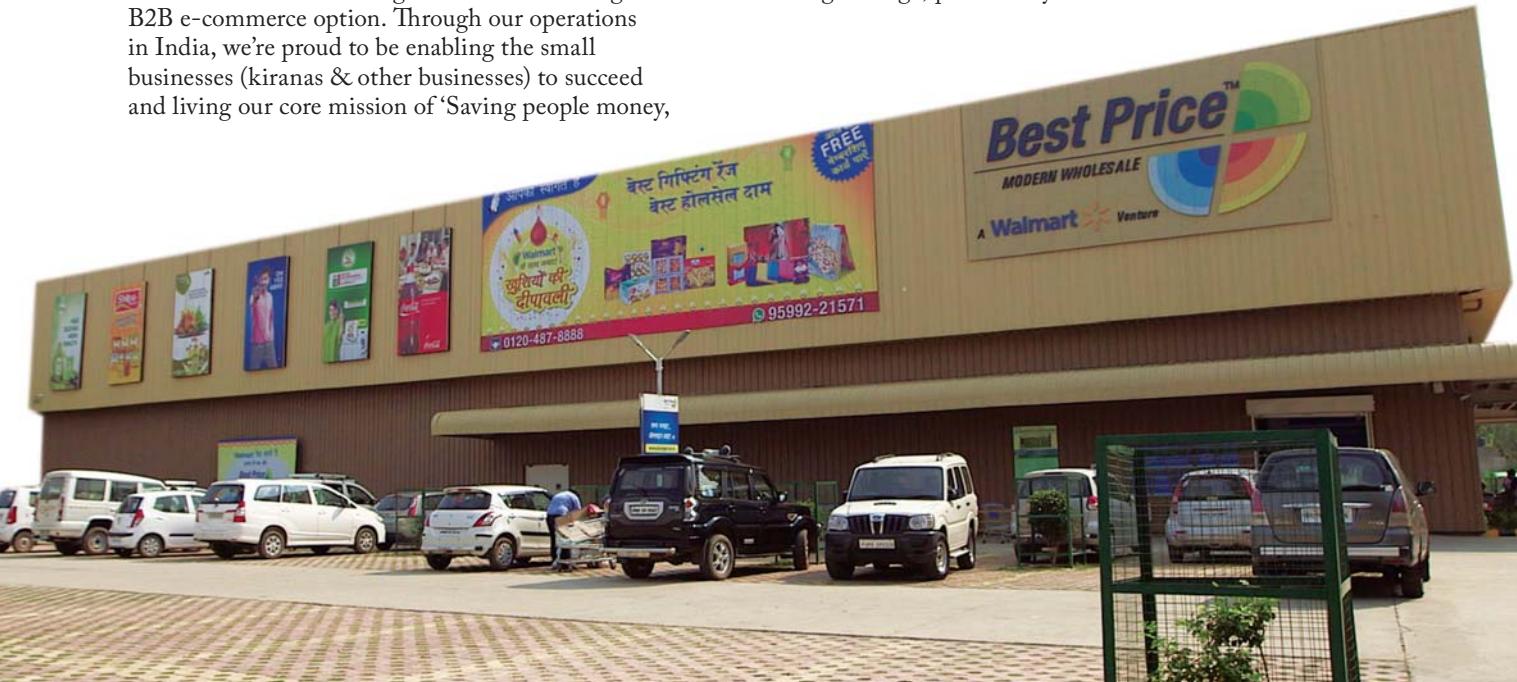
Our vision for India is to partner with farmers, kiranas and other resellers, manufacturers, especially SMEs, small business community and women-owned businesses (WOBs), besides bringing in our knowledge and expertise in supply-chain management and creating new benchmarks in the area of sustainability in the country.

Tell us about the initiatives that Walmart India has taken to realise its vision of partnering with farmers, kiranas, manufacturers and women entrepreneurs?

World-wide, Walmart is renowned for its efficiency and expertise in logistics, supply chain management and sourcing. Our vision is to replicate those global best practices in supply chain and logistics in India and, in the process, help small retailers become more competitive and transform farmers, small manufacturers and women-owned businesses into successful business entrepreneurs. We are committed to making a lasting and sustainable positive impact on the growth of the economy at both the production and consumption end in this rapidly expanding Indian economy.

Walmart India has been at the forefront of partnering with kiranas. Through our cash & carry business, we sell quality merchandise directly to retailers – big and small, including small "mom-and-pop" or kirana stores. The purpose of this wholesale cash-and-carry venture is to establish an efficient supply chain linking farmers and small manufacturers – who have limited infrastructure or distribution strength – directly with retailers, thereby maximising value for all. An efficient supply chain and back-end infrastructure helps in minimising wastage, particularly of fresh foods and

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Are you eating the right thing?

As a rule of thumb, foods are generally safe. However, there are things that get into food and could shock and disgust you enough to keep away from food altogether! What will surprise you further is that many of these things are permitted by the food safety authorities, but within limits. Some substances, like certain toxins, are naturally present in foods. And so even if the food authorities wanted, they could not ban them totally. Some of these 'foreign' substances might not be dangerous but not even in your wildest imagination could you have thought that they could be on your plate

By Dr Saurabh Arora



Rodents scavenge for food and rummage in food stocks. In fact rodents could make stored foods their home if entry is not strictly prevented. Where there is laxity, rodent hair, urine and droppings enter foods and from there they could get to your plate. So watch out as your food could be biologically contaminated.

The next time you eat a burger or open sealed packs of foods or cans of mushrooms and tomatoes, check carefully. It could be infested with maggots and insect eggs. Your cabbage and spinach could have caterpillar larvae in it. Believe it or not, a limited number of maggots are permitted in food!

Cockroaches, flies, insects of all kinds and even spiders and lizards can fall into food. They are highly dangerous if found in foods as they can carry bacteria from dustbins and drains to foods. The presence of rodents and insects is a food safety violation that could result in cancellation of licence for food establishments.

Moulds and fungus grow on foods when the temperature is warm and the rainy season finds these in abundance in sauces, jams, jellies, cooked and processed meats and poultry, cheese, bread and even fruit. Surface moulds can be washed or dusted off but that does not mean they have gone away completely. The fungus has roots that go deep into foods and these are not visible to the naked eye. Dish-cloths, towels, sponges and mops, if not kept clean, spread moulds, which land up in your food. Avoid anything smelling musty and stale and check vegetable and fruit stems to detect moulds.

What are cleaning agents doing in your food?

Cleaning agents like ammonia, bleach, dishwashing liquids and sanitisers can cause turmoil. People have had them with their coffee because the personnel forgot to rinse out the coffee machine thoroughly. Human error it could be but the carelessness in not rinsing and washing utensils or cooking surfaces thoroughly can lead to not only a bad taste but

some stomach burning and even food poisoning. Cleaning agents need to be stored away from all food preparation areas and utensils. Cooking and food preparation surface areas must be cleaned, washed and sanitised only when food preparation is over and no food is outside. Such carelessness ruins the reputation of the food establishments.

You could be ingesting heavy metals

Copper, brass, cadmium, lead, zinc mercury and even arsenic could be in your food. Metals leach into foods from the environment and from utensils used for cooking and serving food. Cracked or chipped pewter dishes, pottery dishes with glazed lead or those pretty enamelled dishes you cook and serve food in can leave lead and mercury or cadmium in your foods and can even react with acidic foods like tomatoes, orange juice and pickles. Copper cooking utensils, buckets and tubs made from galvanised metals like zinc, and plumbing pipes also introduce metals into foods. Mercury and arsenic can reach foods through water and cadmium and lead from soil. All these heavy metals can cause toxicity when ingested and could even damage the liver, kidneys, central nervous system and blood, while mercury can cause sensory, visual and auditory problems also. Since chemicals cannot be seen adequate and regular food testing is required to ensure that foods are free from these elements at all points in the food chain.

Are you sure your milk products have no melamine?

Are you sure that the infant formula you are feeding your child with or the chocolate and frozen yogurt you are eating is free of melamine? So what is melamine and why is it used in foods? Melamine is synthetic material used to make plastic tableware and dishware, adhesives and even whiteboards. So what's it doing in your food? Water is often mixed into milk and such milk loses proteins and so to enhance the content of protein melamine is mixed in it. Products made from milk could have melamine, which can damage the kidneys permanently.

Packaging infuses chemicals into food

Antimony and tin are used in packaging materials from where they can enter food. Foils, cans, pans and storage containers have chemicals, which can be released from them into food at low levels and these, when ingested, cause various health problems.

Human beings leave their own stamp on foods

While human hair found in food might not be hazardous as animal hair, but their presence in food indicates that the establishment lacks in good hygienic practices. Besides hair, nails, false nails, nail polish, pieces of jewellery, paper napkins and



even cigarette butts can enter food and have been found, more often than anyone would like to admit. All personnel working in food service industry need to be made aware of these hazards and instructed and trained to follow good hygiene practices.

Mice and horse in your processed meat

Animal hair or chipped pieces of bone can be naturally present in meat food products. Perhaps, what you may not be aware of is that whole mice can sometimes be churned into food during processing. Unscrupulous manufacturers add horse and even rat meat to canned meat food products to cut costs, especially those imported, as some countries permit horse meat.

Tea with a taste of iron

Iron filings can enter tea when it is processed as particles escape into tea from the wear and tear of iron machinery. Iron remains in the body and though some iron is good for the body it could become dangerous and lead to heart problems if you are a tea addict and drink copious amounts of it. The permissible limit for iron filings in tea in India is presently 150 mg per kilogram of tea.

The presence of rodents and insects is a food safety violation that could result in cancellation of licence for food establishments

Extraneous materials that can break your teeth

They say sticks and stones won't break bones but stones in food might break your pearly whites. You must have seen dirt, mud, manure, leaves, twigs and other filth and even insect excreta in some raw grains and other agricultural products. While some of these can be removed by picking them out. What about insect excreta? When raw materials are processed into cereals, bakery products, etc., do these remain or have they been cleaned before processing?



Trends & challenges in Retail

With the rapidly changing profile of consumers the world over, it's a challenge for retailers to keep up with the shifting shopping demands. Shoppers today are more discerning and better informed about products and services, and expect a certain standard of shopping experience from retailers. This might be a global trend, but in today's globalised environment similar consumer trends may be replicated across most local markets — including India.

Each local market has its own distinct characteristics and retailers need to adapt themselves to stay ahead of the game. Processes and approaches, which work in the home country of a brand, may not necessarily work as efficiently in other geographies. Local preferences, traditions, tastes and preferences, besides real estate dynamics — such as operating infrastructure and costs — have to be kept in mind for a successful foray into a foreign marketplace.

among Indian consumers. The Indian market, however, continues to face significant challenges to growth in the form of inadequate quality retail real estate space, restrictive legislation policies, and infrastructure bottlenecks. These challenges tend to impede India's retail story, and restrict the market from attaining its true potential.

Some key challenges that retailers face in India include real estate rentals; real estate quality; slowing consumerism; MRP constraints; and policy issues. The erstwhile Indian government's move to open the country's retail sector to foreign supermarkets has been anticipated for some time, and is regarded by market experts as being crucial to kickstart the country's flagging economy. According to the Confederation of Indian Industry (CII), such a move would likely increase the income of producers across sectors by about US\$ 35–45 billion per year, creating approximately 3–4 million jobs with retail chains, and about 4–6 million jobs in the logistics sector, other than creating a demand for more contract labour in distribution and repackaging centers and functions such as housekeeping and security.

Supporters of the new policy say the entry of international supermarket retailers will help bring down the soaring prices, make the retail sector more competitive, and help modernise its ageing infrastructure and distribution systems. Small and medium sized family-run retailers will survive, they say, as they offer a valuable local service that large supermarkets are unsuited to provide.

As FDI in multi-brand retail encompasses big ticket investments, individual as well as institutional investors should have enough policy incentives to encourage them into making commitments towards the retail sector in India. The key beneficiaries of such investment inflows would be the cities with population bases of one million or more, with phased benefits percolating to other locations as well. Vacancy levels would also drop as hypermarket chains would likely occupy large spaces across the cities. The country's logistic sector would also benefit significantly, as leading global players would be inclined to invest huge amounts in logistics and supply chain, which will help to reduce wastages and allow for faster delivery of perishable goods. PG



Despite the structural challenges and bureaucratic bottlenecks that the Indian retail market suffers from, global retailers have been queuing up to enter and establish their footprint in the market, as they are aware of its potential growth opportunities. Growth has almost plateaued in most developed markets, providing little room for retailers to drive their business expansion amid growing competition across segments. The Indian market, being largely underpenetrated, offers significant opportunity for growth — especially in segments such as F&B, fashion apparel, and luxury goods — due to factors such as an expanding middle class, rising disposable incomes, and a growing appetite for international quality goods and services



The author has over 25 years of experience in FMCG and Modern Retail. He is on the selection panel of 'Hunar' skill centre (Retail and Hospitality), a collaboration between Delhi and Singapore governments. He can be reached at rakeshgambhir@imagesgroup.in

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