

Retail Insight

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FOCUS ON CUSTOMER & BRAND ENGAGEMENT



Nikunj Vora
Mapro Garden, Mahabaleshwar



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Ever since the government disallowed deep discounts by online players such as Flipkart, Amazon, Snapdeal, Shopclues, Paytm and others, orders on these portals have dwindled from their earlier highs. It is not hard to fathom why. Deep discounts were the drawing card of these websites and now that they have been pulled back, customers have started flocking back to offline stores.

It appears that the government clampdown on discounts has created a level playing field for both online and offline retailers. On the face of it, the sobering down of online shoppers can be said to be a timely and welcome correction, and online retailers should not fret at this turn of development. They have much to look forward to and if they can put the pieces back together, they will be in the reckoning again.

A recent report on digital retail by AT Kearney & Google noted that people won't stop shopping if discounts were withdrawn. But the focus of e-commerce companies, the report said, should be on product assortment, convenience of ordering and differentiation. It should be noted that the primary value proposition of e-commerce – the ability to be anywhere anytime – still prompts most users to come online.

So e-tailers need to focus on making their platforms more appealing to attract old and new buyers. They need to look at creating value around factors such as choice, trust, convenience, assortment and shopping experience. By focusing on value-added services and customers, online players will be able to ensure that customers keep coming back for repeat purchases.



Amitabh Taneja
 Editor-in-Chief

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FMCGs and modern trade need each other and should to bat together

In this concluding piece on the two part series on how FMCG companies should go about cracking the challenge of 'selling' in a complex retail market like India, **Rajendra K. Aneja** – a retail veteran, who has worked for 28 years with Unilever in Asia, Latin America and Africa – shares his views on how the few home-grown supermarkets and hypermarkets that have commenced operations in India during the last decade can rev up their hitherto tardy pace of growth and pull ahead.



The organised sector contributes a mere four per cent of India's retail market, estimated at 400 billion USD. In contrast, the organised sector comprises 20 per cent in China, 30 per cent in Indonesia, 40 per cent in Thailand and 55 per cent in Malaysia. During the last decade, only a few home-grown supermarkets and hypermarkets have commenced operations in India. Their growth has been slow due to the high real estate prices and political volatility.

The opposition to Foreign Direct Investment (FDI) in the retail business by some political parties is utterly regressive, even though there have been subtle moves to liberalise the norms so as to allow higher foreign investment to flow in the food retail and marketing sector. FDI in retail will enable massive investments in the India's trade and supply chain structures, reduce and stabilise prices, ensure improved training and development of staff and hygienic work environments. Hypermarkets will provide consumers with better and fresher choices in all product categories. The entry of new

operators like IKEA and Tesco and the enalrging of operations by the likes of Walmart and Metro will revolutionise shopping experiences and patterns.

Many state political leaders are taking positions on FDI in retail without a lucid appreciation of the advantages to consumers and suppliers. A few leaders are indulging in rhetoric, drum-beating and emotional outbursts. Many of the antagonists of modern trade may not even have visited a hypermarket. They would benefit by a visit to a supermarket in Dubai, Thailand or even Oman to understand how hypermarkets serve consumers and producers.

The advocates of small grocery shops in India should realise that many street-side “kirana” or grocery shops are absolute health hazards. The hygiene levels of small shops in India is the poorest that I have seen amongst the many countries I have visited on work, across continents. Indian shops are poorly maintained and ventilated. Many abound in rats, insects and ants. Some shopkeepers do not even undertake basic pest control, just to scrounge on some money. Municipal authorities regularly visit shops in many countries to ensure adherence to hygiene standards. Such quality enforcement is not undertaken in India.

I have seen open and festering sewage lines, below and around many retail grocery shops. Many of these outlets sell foods, vegetables, and fruits to consumers. No wonder, large numbers of Indians are always suffering from stomach-related ailments. Many small shops sell date-expired stocks by deleting or smudging the information printed by the manufacturers on the packs. Some small grocery stores do not pass on the free gifts (consumer offers), which are given by the manufacturers of consumer product companies. Professionally managed hypermarkets do not indulge in such malpractices.

Hypermarkets co-exist with small shops in most countries in the world - in large, small, rich and poor nations, in all corners of the world. In Brazil, Colombia and Venezuela, 50 per cent of the trade is through hypermarkets and the balance 50 per cent is through small shops. It is time India removed it blinkers. The modern trade in India is miniscule in size and impact. It has many miles to cross before it can be a significant contributor to the economy or the shoppers' pleasure.

Many FMCG are unhappy with the expansion of modern trade. Hypermarkets buy large quantities in bulk. Hence, they are able to dictate terms to companies. However, modern trade is set to grow substantially due to liberal FDI norms, now kicking in. Smart companies know that they have to serve both segments, i.e. small shops and hypermarkets.

Reverse your field force

“Take away my factories, my plants, take away my railroads, my ships, my transportation; take away my money, strip me of all these, but leave me my men and in two or three years, I will have them all again,” asserted Andrew Carnegie, the Scottish-American industrialist who led the enormous expansion of the American steel industry in the late 19th century. He was also one of the most important philanthropists of his era.

He was the first entrepreneur to realise the importance of a great sales force. Many Indian companies take their field force, i.e. sales representatives for granted. Since fresh candidates are easily available, they think their field force members are dispensable. Such thinking is very short-sighted. When you lose your field force, you lose years of training and experience. More important, you lose the relationships, which the field force has with shopkeepers. The salespersons of any company are its pillars. Tinker around with the pillars and the building starts wobbling.

The salesmen of the company are the first point of contact between the company and the customers, be they supermarkets, wholesalers, small shop-keepers. The relationship between the salesman and the trade is glued by mutual trust. Without this basic faith on

Hypermarkets co-exist with small shops in most countries in the world - in large, small, rich and poor nations, in all corners of the world. In Brazil, Colombia and Venezuela, 50 per cent of the trade is through hypermarkets and the balance 50 per cent is through small shops. It is time India removed it blinkers



Finding the sweet spot in confectionery retail

Progressive Grocer touches down on a store chain that follows a model of retail that is appropriately sui generis. Located near the hill towns of Mahabaleshwar and Panchgani in Maharashtra, Mapro Garden look at itself as a family destination store for holidaying visitors. It treats shoppers as family guests who should go back with happy memories associated with the place, and takes prides in its obsession with customer and brand engagement instead of sales.

By Sanjay Kumar



Nikunj Vora
Mapro Garden
Mahabaleshwar



If you are from north India, it is quite likely that you will raise a questioning eyebrow on hearing the name 'Mapro Garden'. But in the Western Ghats range of India and in and around the hill regions of Satara in Maharashtra, Mapro Garden is a familiar name and sight. Mapro is shorthand for Mahabaleshwar products, and the Mapro Garden park is nestled in the hill station of Panchgani and located close to Mahabaleshwar, which is famous for its strawberry produce as well as for being a popular tourist destination. Mahabaleshwar contributes 85 per cent of the total strawberry produce in India, of which about 80 per cent is consumed fresh. Once in Mahabaleshwar, you cannot afford to miss Mapro Garden where you can catch the strawberries in bloom during the season along with a variety of orchids. The Mapro Strawberry Festival, held every year in early April, has become a signature attraction of the region, attracting thousands of visitors from far and near.

Visitors to Mapro Garden do not tire of taking in the sights and sounds and feasting on strawberries. The campus is spread across two acres of picturesque land, lush with greenery, plants and flowers. The campus houses Mapro Foods, a chocolate factory, and an auditorium to showcase informative short films about fruits, chocolates and some other Mapro products. Mapro Foods makes fruit-based products, and was founded more than 50 years ago. The factory spans an area of nine lakh sq. ft. and produces a range of Mapro products: jams, jellies, squashes and crushes, apart from also manufacturing products for the likes of Café Coffee Day, Betty Crocker, General Mills, Walls, Pilsbury and Kissan. The campus also houses a few retail sales counters – Mapro Stores – and two snug and cosy restaurants. While the Mapro Stores sell best quality

and locally produced syrups and jams, jelly candy, juices and crushes, the restaurants too are a big draw and attract hordes of tourists to its lip-smacking, wood fire pizza and grilled veg. sandwich, which are made with organic ingredients freshly sourced from Mapro farms. Other than the healthy snacks, scrumptious ice-creams and cold drinks are also available at its dining outlets. Then there's a bakery, clean washrooms and plenty of greenery and flowers where guests can shoot the breeze and snap pictures. There's plenty of other activities to indulge in for kids and grown ups alike. Even the elderly and differently-abled can move around the garden campus easily, thanks to wheelchair access throughout the campus.

When Progressive Grocer caught up with Nikunj Vora, the grandson of Mapro Garden's owner Mayur Vora, the place looked like a postcard-perfect picture of a pastoral paradise teeming with happy people and radiant faces. An average 5,000 odd visitors come to Mapro Garden every day, and the number climbs upwards of 20,000 during the peak season from March to May. Amidst the cheerful atmosphere of the place, we sit down to talk about the uniqueness of Mapro Garden and its food production and retail business. "As a company based in the Mahabaleshwar region, Mapro products have been associated with strawberry, and all strawberry-related products are in high demand. Customers are also usually looking for 'what's new'. Since all our stores are single company outlets, and are the primary consumer touchpoint for our brands, we ensure priority service to all our stores. Our stores typically act as catalysts for expanding our trade presence in the surrounding areas as well," says Nikunj who believes that Mapro stores are places for guests to relax. "We do not push sales, instead we provide demand-based assistance in the form of sampling, advice on where and how to use products,

Mapro produces jams, jellies, squashes and crushes, apart from also manufacturing products for the likes of Café Coffee Day, Betty Crocker, General Mills, Walls, Pilsbury and Kissan

Cheese and spreadable fats to record highest growth in processed dairy

With India's sustained economic growth, higher income consumers can be encouraged to trade up to value-added dairy categories such as cheese and yoghurt

Milk and dairy foods constitute about 16 per cent of the overall food market in India. This share is second highest among all seven FG categories after Dry Food Grocery (DFG). The dairy market in India is eye-catching for the primary reason that the country is the largest producer of milk in the world and has a substantially large bovine population with about 118 million milk-producing animals. Milk in India is sourced from cows, buffaloes, goats and sheep. However, it is cows and buffaloes, which contribute the largest share of milk production in the country. In fact, India produces 65 per cent of the world's total milk produced from buffaloes. The Indian dairy industry has grown considerably post the White Revolution and various experts suggest that with the current growth rate, it is expected to become a Rs. 144,000-crore (US\$ 24 billion) organised industry by 2020, and Rs. 840,000 crore (US\$ 140 billion) overall, including the unorganised sector.

The top five milk producing nations in the world are led by India with 117 million tonnes of annual production taking place in 2010. Following India, in descending order of milk production, are the USA (87.46 million tonnes), China (41.14 million tonnes), Pakistan (35.49 million tonnes) and the Russian Federation (32.14 million tonnes) in the same year. Though China is ranked third in the list, yet its milk production has grown during the period with the highest CAGR of 10.5 per cent, while the Russian Federation holds fourth position despite the declined CAGR of -0.8 per cent. During the period from 1996

to 2010, India's milk production grew at a CAGR of 3.9 per cent, the USA's at 1.6 per cent and Pakistan's at 3.2 per cent. In comparison, the world's total milk production grew at a CAGR of just 2 per cent for the same period. In South Asia, including India and Pakistan, the consumption of milk and milk products is expected to increase by 125 per cent by 2030.

Market size and growth drivers

Milk and related dairy products are worth Rs. 362,000 crore market and have grown at a CAGR of 12-14 per cent during the last decade. The market is estimated to cross Rs. 800,000 crore by 2020, riding on a wave of healthy foods consumption and growing demand for processed dairy products including milk. With growing urbanisation and a shifting inclination towards processed foods, Indian consumers are becoming more demanding, thus pushing individual markets of butter, cheese, yoghurt, ghee, ice-cream and other such dairy products to expand.

The major drivers of consumption in the dairy category are the products' attributes that are generally associated with health benefits: having a natural and high source of calcium, protein and other healthy ingredients. The functionality of products such as milk and yoghurt and how they aid with bone and teeth development in children also drive sales among younger consumers.

New product innovation to meet evolving consumer motivations is also driving consumption across the dairy market, as manufacturers seek to tailor products not only to individual taste preferences

How can retailers remain relevant in the mobile world?

At a time when consumers are spending most of the time on their mobiles and looking for conveniences, how can the regular shop compete with tech-savvy startups like Grofers, BigBasket, Swiggy, etc? How can they leverage superior analytics that gives these tech savvy startups an edge over the brick-and-mortar retailer?

By Mayank Bidawatka



The Internet has changed things for the better. Our world has never been the same, ever since the world got used to the World Wide Web. We experienced e-mail, websites, platforms, search engines, chat sites, messengers, social networking and many more new experiences that made us spend more time online till a point where we can't imagine life without wi-fi.

Earlier, we experienced the Internet on the desktop. Now, we experience it on the smartphone. And we use more of it than ever before. The average person unlocks his phone more than 200 times a day! Long lasting phone battery and wi-fi feature are in the top 5 needs of today. We have seen more changes in the last 10 years (since the launch of the first iPhone) than we have seen in centuries.

Mobile – the gateway to the Internet

Access to internet is now a norm. Everyone uses WhatsApp. The gateway to the Internet on the smartphone is app(s) – be it a messaging app, or some game, Google maps, cab apps – you name it. Consumers can't get enough of it. And understandably so – it's making their life easier. Consumers are now a part of the app economy. No wonder every large company or tech startup is pushing consumers to download their newly developed app.

Retail in the mobile world

Many retailers are staring at the new realities the internet-enabled smartphone throws at them. They just don't know how to participate in the new normal. They understand they need an online presence on the mobile. They feel the need to have an app of their own.

what's next

▼ Elicious butter chicken and chicken biryani mix

Butter chicken and chicken biryani are the newest products in the Elicious basket. Packaged in microwave safe tubs, these products offer a great value proposition. With Elicious butter chicken, you can enjoy the perfect bite sized pieces of succulent chicken cooked in gravy. The chicken biryani mix is a perfect blend of chicken and biryani masala that brings alive the flavours of dum biryani. All you have to do is add rice. Perfect for the busy professionals of today, these products bring authentic recipes to you in a modern format.



▲ Del Monte launches new range of mayonnaise

The sauces and condiments major has recently added some new variants to its existing range of mayonnaise. The new launch includes eight new varieties of mayonnaise such as eggless mayo, egg mayo, mint mayo, tandoori mayo, cheesy garlic mayo, sandwich spread, cheesy dip and tartare dip. Available at all leading general and modern retail outlets, the eggless mayo (265 gm) is priced at Rs. 80 and all other variants are priced at Rs. 85 each.

◀ Chandon's party starter kit

Chandon wine brand from the house of Moët Hennessy India has recently rolled out its new party starter kit for the perfect spritzer experience. The kit comes in two wine variants – Chandon Brut or Chandon Brut Rosé– along with a pop-coloured Chandon flute, which is available in six different colours. The Chandon's party starter kits are priced at Rs. 1,200 for Chandon Brut and Rs. 1,400 for Brut Rosé and are available at select wine stores across Mumbai, Delhi, Bangalore and Gurgaon.



► Fresca's Aam Panna drink

Beverage brand Fresca has added Aam Panna drink to its existing portfolio of summer beverages. Made with hand-picked green, unripe mangoes roasted and peeled carefully to extract the pulp, the drink is packaged by following all safety standards to keep the freshness intact. With pocket friendly pricing, the products are available across all leading stores at Rs. 20 for 200 ml and Rs. 25 for 300 ml.



▼ VLCC launches slimmer's digestive green tea

Wellness brand VLCC has unveiled a new range of herbal infusion green teas, which improves digestion, helps in weight-loss and reduces the risk of cancer. These green teas are available in three different variants. Besides, the slimmer's range is priced at Rs.80 for 10 bags and Rs.175 for 25 bags and is available at all the leading retail stores.



▼ Tops' summer delicacies

Tops by G.D. Foods has recently introduced a whole new range of summer delicacies like kesar kulfi, custards, fruit jellies and much more. Besides, the brand has come up with new flavours of jellies like mango, orange, blackcurrant and strawberry. Made to woo the Indian palates, these cold summer delights are available at all leading retail stores and prices start at Rs 35.



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