

PROGRESSIVE GROCER

APRIL 2011

AHEAD OF WHAT'S NEXT

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INDIA EDITION

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Food Talk

At Food Forum India, it's time once again to embrace the benefits of changing for the better.

Food Forum India has returned once again as the largest congregation of key global and Indian, food retailers, manufacturers, organisations and minds in the food business in India. Marking its fourth anniversary, this event presents the opportunity for food businesses of all stripes to showcase their products and services amongst the leaders in the industry. Besides manufacturing and marketing, Food Forum India (FFI) spans the vast array of business segments such as food retail, food design, food technology & processing, food logistics & support, and information technology.

This year FFI has once again offered tremendous opportunities for food producers and brands to demonstrate where they stand today and showcase the direction that they are headed in. This exceptional display of innovation, talent, creativity and of course, great taste, has brought together the producers, big and small, from all over the country. Companies are moving towards producing better and healthier food. FFI is also a tremendous opportunity for food producers and brands to get a complete overview of the market as it stands today and an understanding of the direction that it is headed in.

So, with the presence of key food industrialists and analysts in the food business, the agenda of FFI has been full with leaders sharing their experience and key points from the past and for the future of India's leading food industry. Amongst the highlight of the two-day event include the CEOs Conclaves and Workshops which facilitate extensive interactions and strategise growth in every format of the food business. With participation of the key stakeholders – comprising all major food brands, retailers, shopping centre developers, supply chain & logistics, IT, retail design & shop-fit and the entire support industry

– FFI presents an unparalleled opportunity for learning from the masters and networking with the best in the business.

Ratnakar Gaikwad, Chief Secretary, Government of Maharashtra will address the inaugural session with prominent food industry leaders, while Ashok Sinha, Secretary, Ministry of Food Processing Industries, Govt. of India, will present the Food Vision 2015.

The event will also host the annual conclaves of the National Restaurant Association of India, Forum of Indian Food Importers, GlobalGAP and USIBC. Food Forum CEOs' conclaves and workshops will facilitate extensive interactions and strategies growth in every format of the food business.

One of the popular highlights of Food Forum India is the 'The Evening of Food Titans', which will felicitate outstanding achievers in food retail and foodservice businesses with Coca Cola Golden Spoon Awards 2011.

As our daily schedules and our meals (which are a main part of it) easily reveal in recent times, Indians have seen a dramatic shift in culinary habits. The trend towards drive-ins and quick home delivery services has gained immense popularity and has in turn led to the evolution of numerous other innovative trends. As the chairman of this year's FFI Atul Singh, president & CEO of Coca-Cola India & South West Asia says: "Convenience and variety are the driving growth in the Indian food industry. It is therefore important that the food industry keeps up to speed with new technology and makes adequate investment in relevant food infrastructure areas." So, keep tuned in to see who takes home the Coca-Cola Golden Spoon Awards 2011 and other key highlights of FFI 2011 in the May issue of Progressive Grocer India.

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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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Independents Report

A Class Act

Star Supermarket & Pharmacy places consumer health education at the centre of its grocery operations.

By Joseph Tarnowski

When you walk into Star Super Market & Pharmacy's newest store – opened in November of last year in South Huntsville, Alabama, USA – it's obvious that health and wellness is a key component of its offerings. In fact, the store's pharmacy and its classroom for health education sessions are among the first things you see on entering the store, but as you make your way through the aisles, you can feel the concept of health and wellness emanating from every corner of the facility.

Once you get to know Darden Heritage, owner of the four-store independent operation and a pharmacist by trade, you understand why this is so. "There is a need for consumer education about health,"

he says. "You can't get it at a doctor's office anymore. The insurance companies have forced physicians to move many patients through their offices quickly in order to make their money, so that there is just no time

to provide patients with the education they need. These days, the pharmacist is the health professional who has the most frequent intersection with the consumer, often seeing their patients once or twice a month, vs. once or twice a year for their physicians."

Add to this the fact that everyone has to eat, and a grocery store – with an integrated pharmacy – is the ideal place for educating consumers about how to live healthy, affirms Heritage, whose operation has evolved to be at the centre of his customers' health-and-wellness needs since he first entered the grocery business in 2002. "As soon as you walk into our stores, you know we're into the health-and-wellness business," says Heritage, who also owns six stand-alone pharmacy locations.

Everything about the new store speaks to health, from the displays of vitamins mixed in with its fresh produce offerings, to its weekly ads, which primarily focus on healthier

products, including diet sodas, Two percent milk and lean Angus beef items.

The store was opened by popular demand. A couple who used to be customers of Star's first store in Madison moved to South Huntsville and missed the personal service they were used to at Star. "They had unique dietary needs, and my staff made sure the particular products they needed were always in stock," says Heritage. "They began a Facebook group – Bring Star Market to Southeast HSV – that discussed their experiences at the Madison store, and spoke about how their new neighbourhood could benefit from Star opening up an operation there."

In the information of the Facebook page, which has more than 440 fans, the page's creators have written an update since the new store arrived: "We want to welcome Star Market and Star Pharmacy (and, of course, Terry's Pizza) to South Huntsville. We look forward to getting to know



the staff, and grilling some of those delicious steaks!”

A Star is Born

But what made Heritage especially proud was the fact that when one of the creators of that Facebook page brought up his name, a fan of the page asked, “Who’s Darden?”

“That’s when we realised that the Star brand had arrived,” says Heritage. “I worked so hard to get the brand out, and this was proof that it had happened. It was no longer about me, but about the brand.”

Part of the brand, referenced

in the description, includes Terry’s Pizza – also cited often on the Facebook page – a locally owned pizza shop that has served the area since the 1970s. In 2005, its owner passed away, and his family had a difficult time running the shop, as they all had their own full-time careers. Not wanting to lose the pizza icon’s legacy, Heritage bought the rights to the Terry’s Pizza trademark and recipes, and officially revived the brand in 2006, rehiring some of the original Terry’s staff. Every item sold at Terry’s is made from scratch, including the dough and toppings, and shoppers can buy pizza by the slice to eat

in or “Take and Bake” offerings to cook at home, the latter choice an especially popular item during football season.

And just like Terry’s was the best-known pizza brand in its market, when it comes to beef, Star Market was always the place to go, even before Heritage bought the company. With the company’s steady growth and focus on quality, he wanted to find a way to improve on this already successful department.

“Our meat programme wasn’t broken,” says Heritage. “We’ve always been [known for] our Angus beef, and on the grocery side of the business, meat was always around 30 percent of our sales. But my butchers wanted to do something different, to be the best of the best out there.”

And that’s what they accomplished, establishing yet another brand in the process. Called Heritage Pride Angus Beef, the meat offers a selection of meat from purebred Black Angus cows with a bloodline so pure each can be traced via DNA to their grandparents. The programme was launched with a 30-day promotion in which store associates dressed in cowboy boots and hats, and there were cow tracks leading from the store’s entrance to

the meat department. On the day of the launch, Heritage had a Sarah Palin impersonator visit the store, complete with a police motorcade. “She was so realistic that we had people lined up protesting her visit!” exclaims Darden. “By the time she got to our Five Points store, it was complete gridlock.”

The promotion worked; as strong as meat sales were before the new programme, they’ve grown 25 percent since the new programme launched. “It’s Star’s ability to create and execute programmes like these that makes us enjoy being a ‘David’ in a land of ‘Goliaths,’” Darden points out. “We’re surrounded by chains – Target, Walmart, Kroger, Publix, Costco – we have all of them here. But they can’t do the things we can do, and certainly cannot execute like we do.”

‘David’s’ Origins

When Heritage started in the grocery business, he truly was a David in a land of Goliaths, beginning with a 6,000-sq-ft. store and 15 employees in 2002. The story of how he’s evolved his operation from this humble facility to the new store, which is 10 times its size – and more

Pharmacy Tech

Star Super Markets & Pharmacy is just as high-tech as it is high-touch, but when you look closely, it’s clear that as fancy as Star’s technology is, it’s really all about enhancing the shopping experience.

One example is the new point-of-sale system the grocer is installing that actually integrates the POS systems of both the grocery and pharmacy sides of the business. “One of our charges was to incorporate in the IT side a system that can communicate both on the pharmacy side and on the grocery store side,” says Lonnie Miller, COO of Star. “Our existing POS solutions were two different systems that didn’t communicate. You could download pricing files to the grocery side, and you could download pricing files to the pharmacy side, but you couldn’t download them to both systems, and that was what we wanted to do.”

They wanted a system that would enable shoppers to ring up prescriptions anywhere in the store and still be HIPAA compliant. “At the same time, we wanted shoppers to be able to ring up bananas and weighted items at the pharmacy side where the pricing would be correct,” adds James Ahlschlager, Star’s CIO. “So, we went shopping for a system that would take care of our dynamic needs. With the previous system, we could ring items out on the grocery store side, but the problems were in the reporting. Once they rung out, we would have to take those sales and manually enter them into the pharmacy software to make sure they were reported correctly, and that they signed all the necessary docs. At the same time, when you start looking at movement reports, the pharmacy side couldn’t report how many pounds of bananas you sold if they were rung up at the pharmacy.”

Star worked with Boone, N.C.-based ECR Software on the solution. “On the grocery side, they worked with Mitchell Grocery, our wholesaler, on

the interfaces, and on the pharmacy side, they worked with QS1 on the interfaces, and then integrated the whole thing together,” says Ahlschlager. “We’ve installed the interfaces and are in the testing phase right now. As far as patching prescriptions through to the POS and getting compliance with signatures, all that is working correctly. As far as QS1 goes, we are the first ones in the industry doing such an interface. It wasn’t easy going to QS1 and saying, ‘We’ll be going with ECR Software for the pharmacy as well,’ but we are still using the QS1 on the back end.”

Star is also quite sophisticated behind the pharmacy counter as well. It uses Parata robotic systems for filling prescriptions, and a unique prescription-picking system – the PickPoint Will Call system from Pleasanton, Calif.-based PickPoint Corp. – for shopper prescription pickups.

The PickPoint solution consists of hanging bags with lights attached to them. Each bag is scanned and associated with a specific prescription order, so that when the customer information is entered at the point of sale, the bag containing their prescription order lights up. “So, if you have a wall full of prescriptions, you don’t have to hang them in alphabetical order or search through bins, which takes time,” says Miller. “You just have to go to the bag that’s lighting up. If you have multiple prescriptions, they will light up in succession as each bag is picked up. And if you are using multiple registers, each register can be assigned a different colour. It’s a lot faster for us and convenient for the customer.”

The system also has warnings for prescriptions that haven’t been picked up after a set amount of time passes, or for prescriptions that are about to expire. “It’s little things like that which help us with our main goal of providing the best service we can to our customers,” says Miller.

Competing fiercely with arch-rival *chai* and other drinks, coffee is emerging as the new leader of the Indian beverages market.

Coffee break, anyone?

By Ajinkya Pawar

Legend has it that seven seeds from a wondrous plant were brought from Yemen by Baba Budan in Chandragiri Hills, Karnataka. These seeds – his followers were told – were a gift from the Holy land and would serve them as food and drink.

Over the next four centuries, several factors contributed to transform those seven seeds into a drink that has come to define the zeitgeist of our times. The café atmosphere imported from English taverns lent coffee the notion of a drink that slows the passage of time for leisurely conversations. And, the Café Coffee Days and the Baristas of the world are spearheading a coffee revolution to make it a witness to intimate conversations between friends and family.

Tea or Coffee?

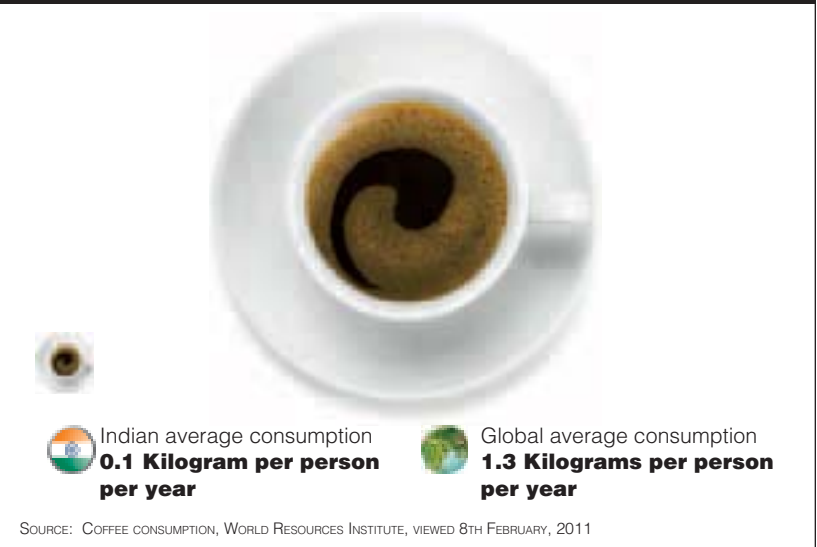
Though tea dominates the hot beverages market – with a 69 percent share in the *chai*-loving country – coffee penetration is catching up with 92 percent of the population being introduced to the drink by 2008, and consumption frequency is growing due to increasing out-of-home consumption and availability of instant coffee.

According to an analysis by Datamonitor, coffee will grow faster than other hot beverages in terms of value in the first part of this decade.

Driving on urbanisation and proliferation of cafés, helping dilettante consumers to become regular coffee drinkers, coffee is expected to witness a CAGR of 15 percent through 2010-2014. Coffee – with a market value of ₹9.3 billion for 2010 – holds around 10 percent share of the hot beverages market.

Entry of leading international café chains such as Starbucks into India – expected later this year – will only accelerate the growth of urban per capita consumption. Currently, India's per capita consumption of coffee – at 0.1 kg per annum – is very low when compared to the global average of 1.3 kg. Unlike the West, Indian café coffee consumption is centred primarily in the evening as a social drink. As home consumption increases throughout India and coffee becomes a part of the daily ritual, perhaps by substituting tea or complementing breakfast. On-the-move urban Indian consumers would increasingly start drinking café coffee in the mornings too, thereby increasing the consumption occasions.

Indian per capita consumption of coffee is very low



The Southern Connection

South India has been at the forefront of coffee production. While most of its produce is exported, over a period of time, coffee has found its way from street-side stalls to traditional Tamil homes, too.

The filter coffee subsequently has been reaching the many corners of India through the South Indian 'cultural ambassadors' – Udupi restaurants. The rich frothy mix served in the traditional tumbler has successfully become a companion to the breakfast and meals for many.

It's no wonder that South India contributes 78 percent of the total coffee consumed in India. Nevertheless, the rest of India is catching up too. According to the Coffee Board of India (CBoI), between 2003 and 2009, the annual coffee consumption in non-southern states showed strong growth of 42 percent, while the same rose by 3.5 percent in the southern states.

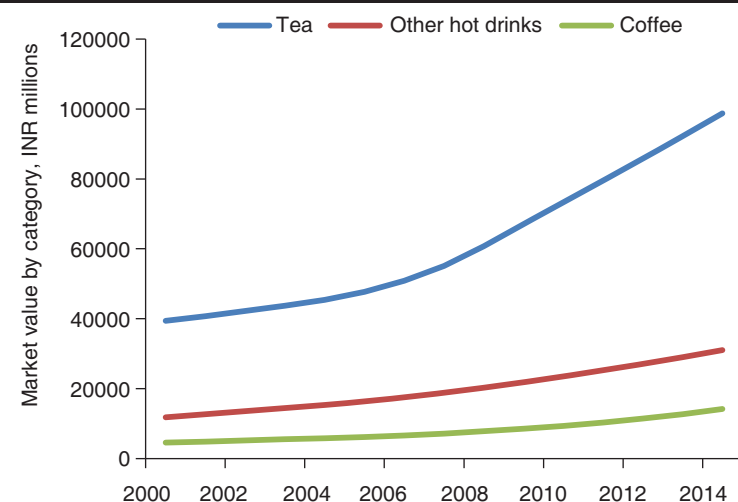
The Quick Start Drink

Outside South India, consumption of roast/ground coffee is substantially less. There is little

appreciation about its preparation. The typical light drinker of coffee is increasingly impatient towards preparation efforts and time for his/her morning drink. Vying for this large target group are other beverages as well, such as tea, juices and other milk-based drinks. The more health-conscious consumer would tend to opt for other options. However, coffee is gaining ground due to its ability to quicken the spirits and boost the mood. Hence, most home consumption brands advertise their offerings on a proposition of a better start – Nescafé's proposition



Tea dominates the hot-beverages industry, 2010





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Techtonic revelations

Progressive Grocer India's first annual retail technology survey shows food and grocery retailers are gung ho about investing in tech-enabled solutions, provided the existing gaps are covered.



By Juhi Sharma and Varun Jain

With the emergence of India as one of the most attractive countries for retail investment – global management consulting firm A. T. Kearney’s Global Retail Development Index 2010 ranked it the third most attractive retail destination – and the rapid modernisation of retail, it is but obvious for retailers in India, too, to deploy technology at the front-and back-end in order to improve business processes and become globally competitive.

But just how much is the current level of technology deployment in food and grocery (F&G) retail in India and what are the prospects of retail technology in the years to come? To know this and more, *Progressive Grocer* India conducted its first annual survey, “The State of Retail Technology 2011”, with the objective of analysing and capturing the present and the future of technology in F&G retail operations and ascertain the mindset of the retail sector as far as technology is concerned.

On Growth Path

For technology deployment to increase in the retail sector, it is important for modern retail to grow at the expected rate. But is it? Eighty percent of our survey-respondents – who comprise modern food and grocery retailers in India – felt the sector was growing at the expected pace, while only 20 percent felt the growth was below expectation.

“Indian food and grocery retail has grown over the last few years and it is forecast to be at USD 443.7 bn,” Rajiv Chopra, director of sales and marketing, Fujitsu Consulting, says, “food and grocery retail constitutes a large share of Indian retail revenues and accounts for the largest share of consumer spending.” Fujitsu is a leading provider of IT-based business solutions for the global marketplace.

Sathyan Gopalan, MD, Wincor Nixdorf India, a Germany-based global provider of IT solutions to retail banks and retailers, is also optimistic about

“F&G retail constitutes a large share of Indian retail revenues and accounts for the largest share of consumer spending.”

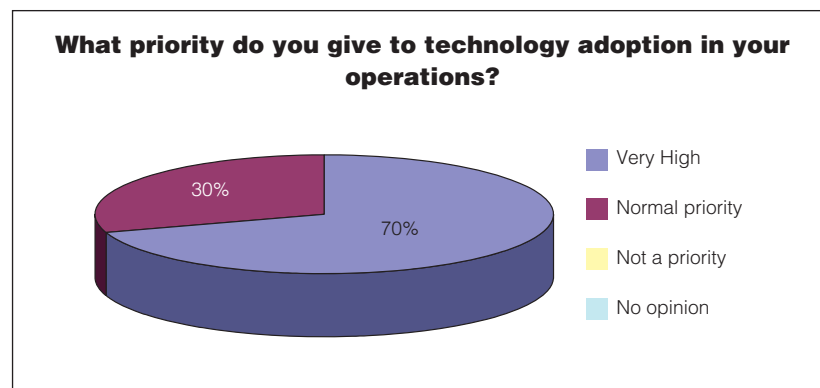
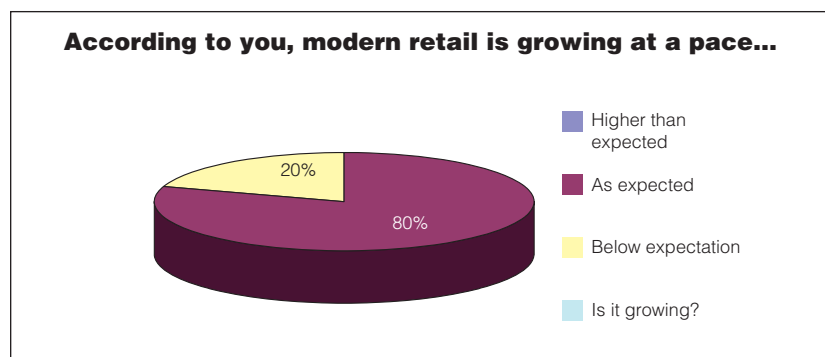
– Rajiv Chopra, director of sales and marketing, Fujitsu Consulting

the growth potential of the Indian retail sector. “If we look at the entire sector, there is considerable growth and movement. With regard to F&G, it is moving in line with the overall sentiment of the industry,” he stresses.

Tracking Technology

As the modern-day consumer demands a great shopping experience, in addition to high-quality products at the right place, time and price, it becomes imperative for F&G retailers to create a technology roadmap and analyse exactly what customers demand. This, though, can’t be done until technology is a top priority for retailers. So, when we asked “what priority do you give to technology adoption in your operations”, as many as 70 percent retailers said technology in their retail operations was being given a “very high” priority; whereas the remaining 30 percent said they gave it a “normal priority”.

And, when it comes to tracking new technology solutions, it seems most retailers try to ensure they don’t miss anything important. Seventy percent of the respondents to this survey said they tracked new technology solutions



It's time to open up

Contrary to widespread belief, imported foods, including fresh produce, in India will actually benefit agribusiness in the long run.

By Sumit Saran

There has been a lot of hue and cry in the recent past over India opening its borders to food products, especially fresh produce. A number of organisations have also announced a doomsday for Indian farmers ever since containers of fresh fruits have started to enter India. There have also been stories about pest-ridden fruits being “dumped” in India. This article is an effort to clear all such myths and try to build a credible case for imported foods as a distinct category. It is also an effort to change the mindsets of those pressure groups who owe their existence to backlashing the world.





Once again, Aahar has proved that India's food processing industry continues to draw attention and investment from manufacturers in India and abroad.

The 26th edition of Aahar – a showcase for food, food processing, hotel and restaurant equipment and supplies – held at Pragati Maidan, New Delhi from March 10 to 14, 2011, provided a segmented platform for displaying the developments and progress achieved in the processed food and hospitality sectors.

The theme of Aahar 2011 – International Food and Hospitality Fair, recognised as one of the leading events of its kind in Asia, was “Moving Away from Commodity to Processing”. However, the special focus was on bakery and confectionery

products, wine services and a culinary show.

The five-day event had 520 exhibitors from India and abroad in two separate segments – ‘Food India’ (covering food and processed foods sector) and ‘Hospitality India’ (rep-





representing hotel and restaurant, bakery and confectionery equipment, and supplies).

The Aahar series of trade fairs have been playing a significant role not only in bringing together the potential business partners from India and abroad, but also for providing a platform for implementing government schemes for infrastructural development such as establishing food parks, packaging and value-added centres, integrated cold-chain facilities and modernised abattoirs. It also offers a reliable and time tested forum for B2B transactions, exploration of joint ventures and technological upgrade and sourcing opportunities.

The latest edition – inaugurated by Union MoS for Commerce & Industry Jyotiraditya Scindia – proved that India’s food processing industry continues to draw attention and investment from domestic manufacturers, as well as from around the world.

On display were food processors, a vast variety of food products, processed foods, alcoholic beverages, food processing, packaging, mill machinery and equipment, machinery related to food processing and packaging of food products, poultry, farm equipment and supplies, dairy and confectionery equipment, air-conditioning, refrigeration and cold storage systems, air and water pollution control equipment and accessories, hotel and kitchen equipment and tableware, health and fitness equipment, consultancy services and miscellaneous products related to the food industry and hospitality supplies.

Major Highlights

Among the highlights were a culinary show coordinated by Indian Culinary Forum, involving live demonstrations along with a competition

regarding cooking and tasting of various kinds of food items, and a wine show, which displayed various kinds of wines and provided sampling of great tastes by reputed companies.

As part of the event, Del Monte organised a special sampling session for visitors to experience the real and exotic flavours of its newly launched Fruit Fillings range in five variants – Strawberry, Wild Blueberry, Raspberry, Dark Cherry and Pineapple.

“Such events are great platforms for knowledge upgrade and networking within the industry. Last year we showcased our worldwide sourcing strengths for B2B products. This year we present ourselves as a partner in creating customised taste and innovation in a variety of food products. Our new R&D and manufacturing facility allows us to be highly responsive and proactive with regard to the needs of our institutional customers,” said Yogesh Bellani, business head, Del Monte Foods Business, FieldFresh Foods Pvt Ltd.

American Connections

High-quality food and agricultural products from the U.S. were also on display at the U.S. pavilion of the food exhibition.

U.S. food industry organisations such as the American Soybean Association, California Prune Board, Washington Apple Commission, Southern United States Trade Association, Food Export Association of the Midwest USA, and Food Export USA North East showcased a wide range of food offerings including soy products, pistachios, prunes and apples, and processed and consumer food products from the Southern, Midwest, and Northeast states of that country.

For the convenience of our readers, *Progressive Grocer* has compiled a list of some of the avant-garde products and equipment on display at the recently held event. Take a look...

