

PROGRESSIVE GROCCER

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Value-added edible oil brands need to push the envelope on packaging and pricing to bolster mass acceptance.

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Brand Recall

Innovation in brand positioning is the key to growth

The modern market is unbelievably competitive. Dozens of new products backed by an avalanche of advertisements enter the shopshelves every year in any given category. In this cut-throat materialsitic world driven by consumerism and competition, it is becoming harder and harder for companies to distinguish themselves from the competition and carve out their own unique identity.

Merely having a good product is not sufficient to ensure success in the marketplace. What is needed is brand positioning, which gives a product its competitive edge. A brand is much more than a name. Successful brands engage their customers by providing a consistency of experience and image of themselves. The trick is to find a niche in the mind of the customer that you can occupy, monopolise and defend.

There are many examples in the Indian marketplace where products have connected with the customers in their own unique ways, and transformed themselves into successful brands. One prominent example is Maggi noodles. It was one of the earliest instant packaged food products that Indians were exposed to. It has remained the undisputed market leader in its segment for the last quarter of a century by positioning itself as fast food that is ready to eat in merely two minutes.

Similarly, Saffola has successfully managed to position itself as a brand that offers health-conscious products such as margarine, salad oil, and mayonnaise. To reinforce its brand image, its website proudly proclaims: "Today,

4 Indians die every minute due to a heart ailment. Saffola's reasons for existence is to lower this statistic. Saffola offers products which are designed to enable consumers to manage their heart health without a change in their lifestyle." As a result, Saffola enjoys an enormous amount of mindshare in healthy, heart-friendly cooking. The Johnson & Johnson brand has been so successfully promoted that it enjoys a near monopoly in the baby care segment.

However, there is the other side of the coin too. Just as there are brands that have clawed their way up and become undisputed leaders of their categories, so also there are brands that have been knocked off their positions by those which turned out to be much more aggressive and competitive.

An example of this is the skincare category. A market that was once lorded over by the likes of Nivea and Ponds is now flooded with newer brands that have somewhat overshadowed the two. The same is the story for Colgate, which virtually introduced Indians to modern toothpaste. It now has to cope with other aggressive brands.

The take-away from all this is that companies should never make the mistake of thinking that if they make a high quality product, the market owes it to be successful. Nothing is as common in history as good products which sank without a trace because they couldn't position themselves properly. Position your brand smartly, occupy a unique niche and then guard it with all your might. That is the only route to an enduring success.

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Derma Matter

Specialist skincare brands are lending lustre to a rapidly expanding category.

By Rahul Ashok

Going by the nature and variety of products launched in the Indian skincare market over the last few years, it is apparent that a makeover is underway. Retailers, manufacturers and consumers are all playing a compelling role in transforming the landscape of this market.

In a nation where almost every person has some advice to offer on what is good for the skin, the dynamics of the skincare market in India are being shaped simultaneously by both hand-me-down traditional knowledge as well as more contemporary product concepts and formats. As such, it is not that a desire for or an understanding of skincare is a novel concept to Indians, but that product usage has traditionally been limited to few categories or select occasions. Over the last few years, though, the increased urge to be considered “competitive” on various socio-professional platforms has resulted in consumers seeking more convenient and nuanced ways to address evolving skincare issues, be they dry skin, wrinkles or tanning.

The impact of these underlying currents has been amply evident in the changing market landscape. Largely fuelled by facial creams, the skincare category in India – worth Rs 37.6 mn as of 2010 – has grown at a healthy compound annual growth rate (CAGR) of 13 percent over the last five years. It is also interesting to note that even small and niche categories, such as anti-aging products and depilatories, have registered healthy double-digit growth rates.

These changes mark the coming of age of Indian consumers, not only with respect to awareness of various personal care products, but also in terms of purchasing them on a regular basis. Consumer spending across constituent categories throws some light on how the perception of grooming is evolving differently across the various product segments.

Skincare vs Haircare

“Flawless skin” and “lustrous, long hair” epitomise the notion of beauty among many Indians. That said, there seem to be a lot of differences in solution-seeking behaviour when it comes to the usage of packaged personal care products in the two categories. This difference becomes apparent when one looks at



per capita expenditure (PCE) – Indians spend \$1.41 every year on haircare, but a paltry \$0.66 on skincare. To put things in perspective, Indians’ spend on skincare is so low that the country does not even feature in the top 50 in terms of PCE for the product type.

Looking at the evolution of the two categories, there are some variations that could have led to this apparent difference in consumer spending patterns. In the case of haircare, the major brands have invested a lot of time and money in educating consumers and building awareness across product segments. These efforts have been aimed towards showcasing the efficacy of formulations, leveraging existing haircare practices, and, most importantly, making each product relevant and part of consumers’ standard personal care regime.

In contrast, the skincare market is heavily skewed towards facial creams and fairness solutions in particular. As such, mention “skincare” and most consumers are likely to recall communications along the lines of: “fair skin is pivotal in getting the best opportunities in life”. Other skincare concerns, including dry skin and wrinkles, are being leveraged by very few brands in the mass media.

As a result, products that can help address those concerns have still not become a part of the average Indian consumer’s regime. Furthermore, given the fact that consumers in most parts of India use various home remedies to treat their skin, investigating whether and how these practices can be contextualised for today’s skincare needs is certainly something that should top the “to-do” list of skincare brands.

Fair Enough?

Fairness cream is possibly the skincare segment that has attracted the most attention over the years, in ways both positive and controversial. While debates continue on the cultural relevance and ethicality of the category, the desire for fair skin

The skincare market is heavily skewed towards facial creams and fairness solutions in particular.

remains in consumers’ minds. Meanwhile, marketers have scrambled to change the category proposition through creating more efficacy-led claims and refining marketing strategies to alter the consumer perception of creams from being meant for special occasions to something that could potentially be a part of their regular face care routine.

From playing purely on messages about “fairness”, brands in India, thus, have evolved to talk about products in varied terminology such as “whitening”, “radiance” and “glow”. These propositions have been combined with other claims like “sun protection”, “blemish removal”, and “age-masking”, but without moving away from the concept of fair skin. The intention is to add layers on top of the proposition of fairness, but not to do away with it entirely in

the brand communication. Consider Neutrogena’s slogan, “Get radiant fairness that lasts even in the sun”, or the name of L’Oreal White Perfect.

The penetration of fairness creams in India is still only around 25 percent, despite marketing attempts such as creating smaller sachets to encourage trials, taking a “mass prestige” approach to brand positioning, lowering prices and so on. The key message for brands here is that selling these products is not simply about affordability, but more about creating a desire for fair skin and each additional product benefit that is communicated in the minds of consumers. For this, brands need to go beyond the generic category proposition by building the relevance of each benefit other than fairness, piece by piece, to consumers’ skincare regimes.



GET WELL SPOON

The value-added edible oil segment is set to spill over owing to the growing demands of the health-conscious urban Indians.

By Utpala Ghosh

As urban Indians learn to prioritise health over taste, edible oils have also gained momentum in graduating from being just a cooking medium to an effective tool for lifestyle correction. Traditionally, the Indian cuisine has been fat-rich. However, with changing lifestyles and rising health concerns such as diabetes, obesity and cardio-vascular diseases, greater emphasis is being laid on cutting all unhealthy components from lifestyles – including those on the dinner table. Moreover, the ‘feel good, look great’ aspiration has also developed into a powerful driver of change in what Indians ingest.

India is the world's fifth largest oil-seed producing nation with a wide range of oil seed crops – groundnut, mustard, rapeseed, sesame, safflower, linseed, niger seed, among others – in its portfolio. The country currently contributes 6-7 percent of the global oil seed production. According to a Rabo India report, the domestic edible oil market – estimated at USD 15 billion last fiscal – is set to grow at 5-6 percent in the next five years. At 12.7 kg, the per capita consumption of edible oil in India is much lower than the

average per capita global consumption of 20 kg per annum. The annual edible oil consumption as projected in the Annual Report 2009-10, Department of Food and Agriculture Distribution, Ministry of Consumer Affairs, is 18 – 18.5 million tonnes. The share of branded oils in this is 20 percent, accumulating to a market size of 3.5 – 3.75 million tonnes.

According to the National Council of Applied Economic Research (NCAER), the demand for edible oils is projected to rise between 22.8 and 29.4 million tonnes in the near future in tandem with the average per capita income growing at 4-6 percent.

The edible oil industry is largely dominated by the unbranded bulk segment that primarily constitutes loose oils catering to the commercial units and the rural population. It accounts for around 80 percent of the total edible oil consumption. The shares of crude oil, refined oil and vanaspati in the total edible oil market are estimated at 35 percent, 55 percent and 10 percent, respectively.

Preferred Oil Types

Edible oil consumption is primarily a community-driven phenomenon in India. Going by the traditional cuisines, mustard and rapeseed oil are used in the northern and eastern states of the country. Coconut, peanut and sunflower oils are widely consumed in south India while peanut and cottonseed oils are the cooking medium of choice in Gujarat. Rapeseed oil is popular in north east India; soybean oil is more prevalent in central India.

As edible oil manufacturers scurry to cater to growing demand according to regional preferences, they are expanding refining capacity. At the same time, they are also promoting fortified palmolein, safflower and rice bran oil as healthy cooking oils. Cottonseed oil, which closely competes with peanut oil, is also finding wider acceptance in the Indian diet. Due to its light colour and neutral odour, it is increasingly used for blending with higher priced oils.

Commenting on the market share of edible oils in India, Angshu Malik, COO, Adani Wilmar

Limited, notes: “The dominant type is Palmolein oil, which has a market share of roughly 40 percent. About 20 percent of the market is occupied by soyabean oil, followed by another 20 percent by mustard oil. Sunflower oil is estimated at around 8 lac tonne, which is around 5 to 6 percent of the market. Another 5 to 6 percent is accounted for by groundnut oil; 5 percent by cottonseed oil; other oils such as rice bran oil, coconut oil, and so on account for 10 percent.”

“Over the last five years, the top end of the market has witnessed some churning, with refined oils getting progressively replaced by healthier cooking alternatives such as olive oil, canola oil, rice bran oil and blends of karadi oil with sunflower, etc. There is a reduction in the intake of fried foods but a greater consumption of salads along with lower use of oil in cooking per se, especially at the top end of the market. This concern for health is leading families to explore alternatives such as karadi oil, rice bran oil and olive oil, which are now available aplenty,” says Mohit Khatkar, MD, Nature’s Basket.

“This trend towards healthier alternatives has been gathering speed, especially over the last two years. Amongst foreign edible oils, olive oil has been leading the pack on account of its perceived benefits.”

The original preference of Indians was to preserve the flavour of cooking oil because it was supposed to enhance the taste of a particular cuisine. However, the quest for low fat, low absorb oil has led oil types such as soyabean oil, sunflower oil and safflower oil to make an entry into the Indian kitchen. These oils are sold as refined oil which are transparent and odourless and hence can adapt to any

The demand for edible oil is set to rise between 22.8 and 29.4 million tonnes in tandem with the rise in per capita income.

kind of cuisine without changing the authenticity of taste and flavour of the dish. In a market such as India where people choose oil for the taste and flavour it brings to the food, it is particularly essential for any cooking oil – no matter how healthy it is – to prove its credibility by keeping the taste of the food intact. Oils such as soyabean oil, sunflower oil and safflower oil have made their way into the Indian kitchens by fulfilling this criteria.

Another two major oil types that are vying for a share of the pie are olive oil and canola oil. Opinions differ regarding their adaptability to the taste of Indian cuisine. While the manufacturers experiment with different grades and variants of olive

oil to make it suitable for the Indian taste buds, there is another dimension – affordability – that cannot be ignored. It cannot however be denied that with rising health consciousness and living standards, the healthy cooking oil variants are slowly but steadily capturing market share.

From taste to health

In terms of form, the category of edible oils can be bifurcated into loose and packaged oils. The loose oil segment has two distinct types of consumers: commercial units which make bulk purchases, and rural Indians who cannot afford packaged and branded oils.

The change in preferences of Indians for edible oils has taken





Maximum extraction

With innovation taking centre stage in the packaged fruit juices category, topline sales look set to rise.

By Shubhra Saini

The Indian juices market has come of age. Coming as long way from roadside juice vendors and occasional home-made blends, a slew of packaged juice brands now cater to an increasingly health-conscious India. While the per capita consumption of packaged juices in the country is still low when compared to more mature markets such as China, packaged juices have already begun to give tough competition to their carbonated counterparts.

In a bid to capture the potential of the Indian juice market, many brands have come up with exciting ranges of new flavours and variants to jazz up their beverage portfolio. Increasingly, packaged juice manufacturers are also experimenting with new formulations and tastes to offer healthy alternatives to consumers.

The Growth Driver

According to Datamonitor, the juices category is slated to grow by a healthy eight percent in volume terms over the next five years. “The packaged juices category in India is turning out to be a lucrative opportunity for new entrants as well as the existing players. This is largely evident from an impressive 15 percent CAGR in volume terms over the 2004-09 period, reflecting a growing demand among Indian consumers for packaged juices,” says Varun Kumar, senior analyst, consumer markets, Datamonitor.

And, unlike the near duopoly in the carbonates category, the packaged juices category consists of several players, thus resulting in healthy competition and width and depth of choice.

A major growth driver for the juices category is the Indian consumer’s growing reluctance to consume carbonated drinks due to the latter’s zero health content and growing incidence of lifestyle diseases such as diabetes, obesity and hypertension. “As consumers get more and more wary of coloured, carbonated beverage of various kinds, a spin-off impact will be felt by packaged juices at large,” observes Harish Bijoor, CEO, Harish Bijoor Consults Inc.

He further notes that the packaged juice market is waiting to open up dramatically, both in terms of size and niche. “As India rediscovers the joy of fresh food and good health, packaged juices will be a big hit. The niche end of the market is bound to boom as well, with value-added fruit juice options that will govern the top end in terms of premiums and imagery.”

On a similar note, Anand Ramanathan, manager, KPMG Advisory says, “With increasing health consciousness, consumers are moving towards fruits and agri-products beverages, which are supposed to be real



and natural as compared to carbonated beverages.”

This consciousness, he adds, is the reason behind brands such as Minute Maid and Kissan Fruit Juice & Soya doing so well in the market. “According to Euromonitor estimates, the sales of fruit/vegetable

juices grew by 26 percent in 2010 to reach ₹32 bn with lemon-based juice drinks like Nimbooz by 7-Up (PepsiCo), Minute Maid Nimbu Fresh (Coca-Cola) and LMN (Parle Agro) making their presence felt within a year of their launch. The market is expected to grow at 19

percent in near future,” Ramanathan explains.

Opportunities Galore

“A segment-level analysis of the juice category over the last five years reveals that pure juices (100 percent juice – both from concentrate and not from concentrate) have grown the fastest – at a CAGR of 18 percent. Due to the Indian preference for freshly prepared juices, this growth will continue in future, as is evident from an estimated 12.5 percent growth during the 2009-14 period,” asserts Kumar at Datamonitor.

He adds, “Any new entrant will do well to capitalise on this and launch offerings under the 100 percent pure juices segment. Besides the ‘pure’ positioning, new entrants need to place the products in the mass price segment. The current price points – ranging from ₹65 to ₹190 – act as a deterrent for the consumers new to packaged juices. Thus, a good strategy for new entrants would be to launch products which are affordable, thus, ensuring higher participation.”

Retailers on the Juice Brandwagon

With the juice market heating up, retailers have stepped up the war with national brands. Spencer’s private label ‘Smart Choice’ recently launched its 100 percent fruit juices. The 100 percent juice space is already occupied by Tropicana, Dabur Réal, Parle Agro Saint Juice and the latest entrant – Coca Cola’s Minute Maid. “The primary proposition of our product is that we provide significantly higher pulp content than the leading national players do. This leads to much better taste, but we price it at par with national brands, thus, providing greater value for money to the consumer. Shoppers have been quick to recognise this value and our range of ready-to-drink fruit beverages under the ‘Smart Choice’ brand outsells all the major national brands in our stores,” says Mohit Kampani, chief operations and merchandising, Spencer’s Retail.

“If we look at the fruit drink and beverage pie, we have a 10 percent share of business in our stores; on a pack-to-pack comparison, we are outselling national brands, which is a great positive for the private brands’ portfolio. With the launch of new variants and brand extension into premium segments like 100 per cent juice, we intend to capture a 25 percent value share,” he adds.

What's next

Editors' picks for innovative products

Cool assimilation

Dabur India Ltd, India's leading natural health and wellness company, has announced its entry into the mint candy market with the launch of Hajmola Mint Masti.

Priced at 50 paise per candy, Hajmola Mint Masti has the tasty digestive tablet Hajmola packed inside it. Its launch extends the footprint of the Hajmola brand in line with the strategy of adding excitement and contributing to the growth of the confectionery category. Hajmola Mint Masti will be available in all leading food and grocery stores.



From Russia with love

Smirnoff has given a local twist to vodka by launching a new variant, Smirnoff Masala Marke, which contains a 750-ml bottle of triple distilled and 10 times filtered Smirnoff vodka with a 600-ml bottle of lemonade and a 50-gm sachet of chatpata chaat masala. The variant is available nationally at select retail outlets, and is being retailed in Delhi at Rs 500.



Tangling sensation

Cadbury India, part of Kraft Foods Group, has introduced all-new 'made in India' Tang variants, while also including a mini pouch priced at Rs 4 in the mix. Launched in a combination of delicious and refreshing

flavours of Orange, Lemon and Mango, this ready-to-mix powdered beverage helps in replenishing essential vitamins A, B and C and iron that get depleted

during the course of the day. The product is available in retail stores across the country. Besides in easy-to-use sachets priced at Rs 4 each, it is also available in SKUs of 200 gm for Rs 35, 500 gm for Rs 80 and 750 gm for Rs 115.



Port of call

Winemaker Nirvana Biosys has extended its product portfolio with the introduction of a classic port wine under the brand name 'Mitra 2000'. The port style red wine has a strong taste, which will be relished by all wine connoisseurs. To have a classic wine experience, it should be served at 17-18 degree centigrade with red and white meats, tandoori and barbeque. Mitra 2000 is available in a distinctively designed 750-ml bottle priced at Rs 200.



Ice Age II

Gaia has launched two new flavours – Lemon and Peach – of its green ice tea. The company claims that the newly introduced flavours serve as perfect substitutes for high-calorie soft drinks, fruit juices, smoothies and aerated drinks. The green ice tea is also loaded with essential vitamins, minerals, antioxidants and flavonoids.

Gaia Green Ice Tea is priced at Rs 275 and available at leading pharmacies and general stores across Delhi-NCR, Punjab, Haryana, Rajasthan, Uttarakhand and Gujarat.



Viva Italia

Processed food and beverages brand Del Monte has announced the launch of an authentic, tasty and easy-to-cook Italian range. The range now includes a wider portfolio of Italian pastas, pasta sauces and olive oil. The new Italian range has also been very well packaged with a focus on convenience. New pasta shapes come in 500-gm block bottom pouches, which protect the contents and are re-sealable for multiple usages. The 250-gm pasta pack is a great trial pack and is a meal option for a four-member family. With the new launches, Del Monte pasta is now available in seven different shapes. In addition, there is a new whole-wheat version of the popular Penne. Del Monte pasta sauce range includes four variants in 340-gm glass jars, namely, Arrabiatta, Tomato & Basil, Veg. Bolognese and Siciliana and will be available in leading food and grocery stores.





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