

PROGRESSIVE GROCCER

OCTOBER 2013

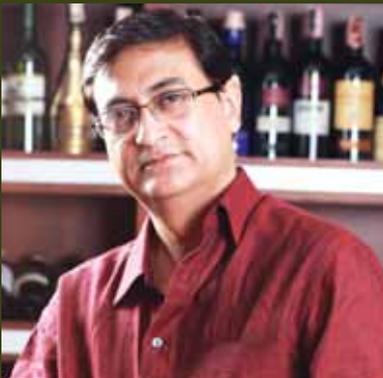
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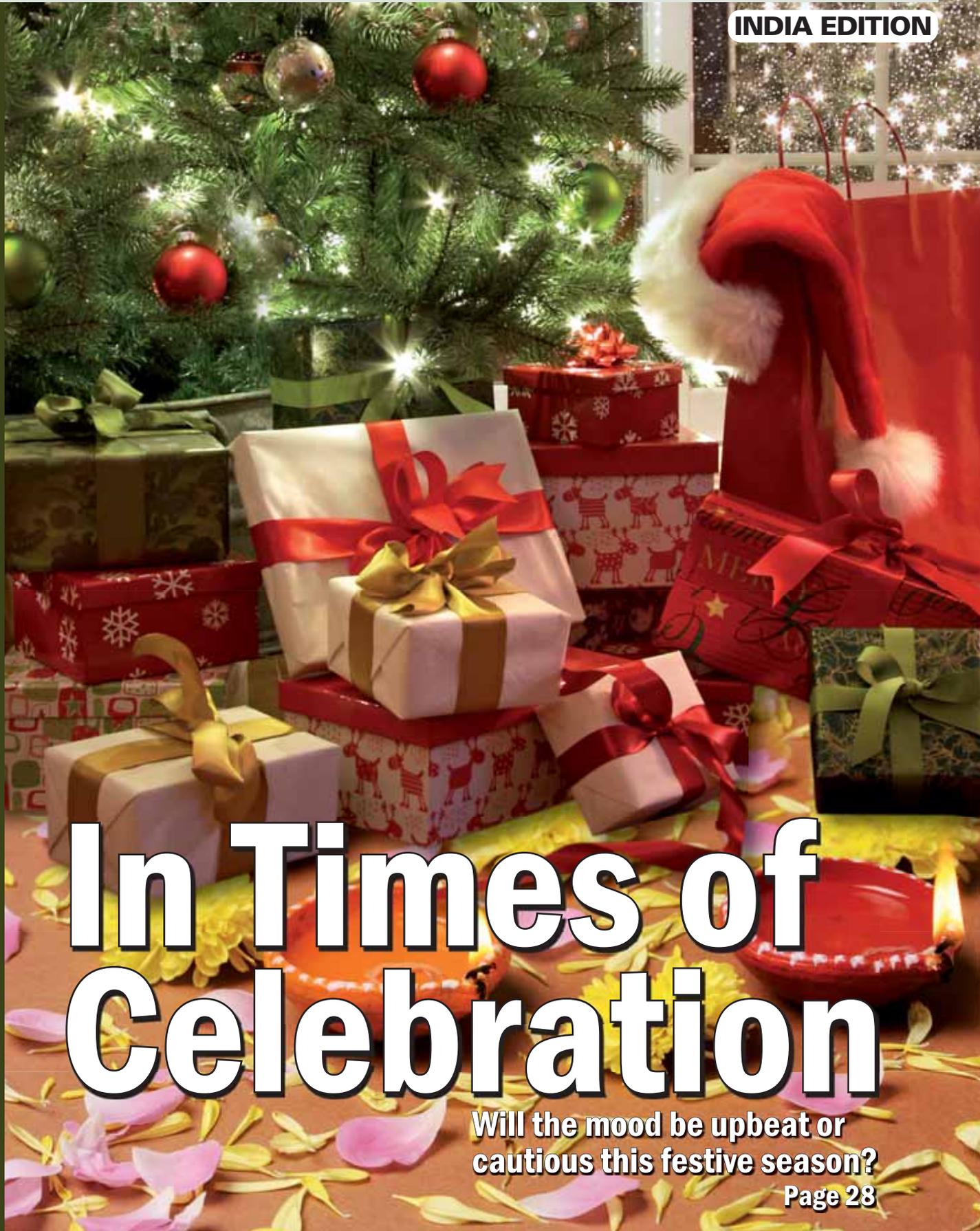


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Not so extravagant, maybe, this festive season

The great Indian festival season is upon us, and expectations of both the consumers and the retailers are peaking. The former are looking forward to striking bargains and the latter for generating huge sales. The sentiments of both are realistic: retailers announce lucrative offers, lowered prices and discounts, and consumers, in great anticipation, come prepared to shop till they drop.

According to a study by Nielsen, festive occasions contribute around 12 percent of overall retail sales. Among the festivals, Diwali tops the chart in terms of increased sales. The grocery retail space brims over with an abundance of new product launches, gift hampers, and festive offers that drive the frenzy. Competition is rife, as companies leverage their brand value on attractive offers (though some scoff saying that sales should be driven by the brand's perceived value and not by lowered prices!).

This year, though, the topsy-turvy economy, inflation and high prices have cast a pall over the markets. Nevertheless, in my view, the resilient Indian shopper will not balk at spending during the auspicious festive season, though he/she will definitely be wary of "indulging". In our cover story, we have scoured the markets to gauge the mood and check out the preparations being made by brands and grocers.

In this issue, we also shift focus down South and highlight the achievements of our Southern grocers and also profile some strong South Indian brands that have now acquired a national presence.

I would also like to extend a heartfelt "thank you" for your support of our recently concluded India Retail Forum, which, this year, has surpassed our expectations in terms of industry participation, visitor turnout, and overall positivity and confidence in Indian retail fundamentals. We carry a report from the Forum on key learnings and trends for the grocery sector, as emerged from the deliberations there.



Amitabh Taneja
Editor-in-Chief

All feedback welcome at editorpgindia@imagesgroup.in

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Food inflation is at an all-time high, leaving grocers and suppliers worried about the impact on consumer spend in the festival season. So how are they gearing up? Are they confident that the season will fetch them good sales, or are they wary of being left with under utilised inventory?

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Shopping For Success

India Retail Forum once again connected businesses, people, knowledge and ideas for the profitable growth of modern retail

By Debsona Roy & Nikhil Paruchuri



The recently concluded India Retail Forum (IRF) organised by the Images Group, was once again graced by industry leaders, policy-makers, infrastructure developers, business facilitators, and academia. The Forum has been on the forefront of strategic issues related to modern retail in India since its inception in 2004, and is today perceived as the flagship industry event in the country. Over two days, the Forum's 10th edition saw the largest gathering of the brightest minds, products and concepts that are driving the future of the retail industry in India. New ideas, concepts, and equations were created, and old relationships reinforced.

Building the Appetite for Growth

The Food & Grocery Retail CEO's conclave titled "Building the Appetite for Growth" saw CEOs and industry experts discuss the second phase of growth for food retailers as the original market gets saturated with their service offerings. Panelists included Kishore Biyani, CEO-Future Group, Kingshuk Basu, ED - Operations, Spencer's Retail; Jamshed Daboo, CEO, Trent Hypermarkets; Ashutosh Chakradeo, Chief Merchandising Officer, Hypercity; Devendra Chawla, President, Food Bazaar; Laxmichand Gada, Owner, Society Stores; Murali Krishnan, CEO, Nilgiris, Shubhranshu Pani, MD - Retail, Jones Lang LaSalle; Rajeev Anand, Director, Europark;

Rodrigo Blanco, Commercial Counselor, Mexican Trade Commission, ProMexico; and Sachin Tagra, Vice President, Business Development, LoyaltyOne. The session was moderated and led by Mohit Khattar, MD, Godrej Nature's Basket.

They panelists focussed on the most important issues and opportunities in the retail industry, which is evolving at a great pace, growing the relatively new gourmet foods section, creating loyalty and differentiation, and using business analytics to understand customer purchasing behaviour. Khattar gave a quick overview of the Indian retail business, where 60 percent of the current \$ 500 bn retail market is the food segment. While



In Times of Celebration

Food inflation is at an all-time high, leaving grocers and suppliers worried about the impact on consumer spend in the festival season despite the fact that shopping is integral to the festival season. So how are they gearing up? Are they confident that the season will fetch them good sales, or are they wary of being left with under utilised inventory? Manisha Bapna scours the markets for some answers

The long festive season is on, and the air is thick with expectancy as one wonders whether the markets will see the glint and fervour of the previous year or not. The slump in the economy, the falling rupee rate, and sky high prices of all consumables are hardly conducive to consumer spend. Yet, it is impossible to dampen the festive mood, as it seems to be building up slowly but definitely at the supplier and retailer end.

Diwali, unarguably the most popular festival in the Indian sub-continent, has found a place in the testament of marketing strategies of India's modern retail business. The season stretches upto Christmas and culminates by bringing in the new year. For most retailers and shoppers though, the festivals begin from Ganesh Chaturthi, Onam, Navratri, and Dusherra before leading up to Diwali, and subsequent the winter season celebrations. Every year, September, October and November are the months earmarked for annual shopping, giving consumers a reason to make discretionary purchases for painting their home or refurbishing it, upgrading their home appliances, indulging in exotic and gourmet foods, etc. During this season, the entire retail landscape buzzes with attractive offers, deals, discounts, innovative schemes and gifts in almost every category from clothing, electronics, consumer durables and paints to dinnerware and cookware, and lifestyle accessories, etc.

In the food and grocery space, categories that record the highest sales are staples like wheat, rice and pulses, edible oils ghee, green tea, breakfast cereals, processed foods and beverages. In fact, most categories get a fillip due to overall buoyancy in consumer spend compared to non-festive periods. Though this year is set to be more challenging, there will still be higher sales compared to the first half of the year. Typically, for household and monthly basket items, the focus shifts to larger skus, while in personal care, trials in smaller skus of premium brands tend to go up as consumers like to indulge themselves in the spirit of the season.

Looking at last year's trends, Nielsen reports that 2012 Diwali sales saw a 34 percent jump versus the same week in the previous year (2011). There was a change in the gifting pattern witnessed last year and an increased appetite for innovative items. With an earmarked budget, the focus for consumers was on impulse category purchases like soft drinks, chocolates and salty snacks, which contributed to nearly 80 percent of

incremental sales. Other categories that saw healthy growth included refined edible oils, pure ghee, as well as ready-to-eat snacks. Shoppers also tend to choose additional categories like biscuits, packaged tea, washing powders, rice, non-refined oils and frozen foods – all of which grew incrementally in 2012 than in 2011.

Last year, major retail chains in the city had introduced discount schemes such as Star Bazar's Khushiyon Bhari Bachat, Big Bazaar's Swagatam Dil Se, Dmart's Sari Khushiyaan ab Budget mein, and HyperCITY's Khushiyan Dil Khol Ke. According to leading retailers, 40-45 percent of all chocolate sales in India were during the festive season in 2012, up from 30 percent over the previous year. Influx of international brands selling affordable ranges, especially as gift packs, and adding an Indian touch to the packaging, helped this sudden surge. Retailers attribute the increase in chocolate demand to spurious mawa being used in the making of mithais, which saw sale of traditional mithai going down by nearly 40 percent and mawa-based sweets by 70 percent, with people opting for chocolates, dry fruits and even paan-laddoo over mithai. Also, the sudden influx of international brands selling at affordable ranges, especially gift packs, and adding an Indian touch to the packaging, helped this surge.

What's in store this festival season?

Share of large assorted packs, or gift-packs of chocolates, salty snacks, confectionery and juices doubles during the festive season. PepsiCo, Dabur, Cadbury and Parle achieve

Top sellers

- Sales during festive season are expected to cross 40% this year with major focus by retailers on discount schemes and offers.
- Demand from biscuits and snacks manufacturers and restaurants may increase by 20 - 25% during this period.
- Share of large packs or gift-packs of chocolates, salty snacks, confectionery and juices has doubled during the festive season
- Premium health juices are the fastest moving products
- Staples like wheat, rice, flour and pulses see highest sale in any festive or non-festive season. These are followed by green tea, breakfast cereals, juices, ghee, edible oils and processed food.

almost 40 percent of their annual sales in the October-December quarter. In fact, brands are increasingly offering interesting combinations of products that are consumed in conjunction with each other. There are various permutations and combinations of items used in the preparation of festival food and sweets. Chocolate brands are also offering combinations in attractive festive packaging. These hampers and gift boxes have multiple variants clubbed together to offer a full range. It is the same with dry fruit hampers and



Southern Imprint

South India's food and grocery market is on an upswing. The region's brands are leaving their imprint across the country with their manufacturing efficiencies, focus on quality, and wide distribution network, while the Southern grocers are positioning themselves on the strength of their merchandise assortment, understanding of consumption trends, and a modern approach to retailing

Compiled by **Roshna Chandran**

South India is seen as the pioneer of modern retail. In fact, until the late 1990s, food retailing was concentrated largely in the southern region of the country, which witnessed and revolutionised food retailing. The region was home to various retail formats such as supermarkets, hypermarkets, department stores, besides the traditional neighbourhood stores, long before modern formats became visible across other parts of the country.

Retail chains such as Food World, Subhiksha, Nilgiris, Margin Free, Trinethra Super Retail, Reliance Fresh, Spencers Food Stores, and Big Bazaar are names that come to the mind when one talks of South India. Some continue to exist, some have been bought over by other companies, and some have closed shop. But numerous regional chains are flourishing across the region.

The concept of organised food retailing began to emerge across the country as entrepreneurs began to eye the high potential markets in the north, west and east of India. But most food retail players have preferred to be region-specific as regards geographical presence and expansion.

What is interesting now is the growth of South's regional brands who are leaving their imprint across regions, and grocers who have modernised and grown their business on the strength of their understanding of what consumers want.

South's master producers

Regional brands in South India who have established a strong national presence, are seeing a blistering growth of 20 to 25 percent year on year. Companies like Manjilas, Priya

Foods, Eastern Condiments, and Kaleesuwari have adapted to changing consumer trends by expanding their product portfolio, and including authentic regional foods, that have made them a household name. They have upgraded their production facilities with efficient and eco-friendly technology, and scaled up production to meet demand with timely supply. These companies have also identified core markets on a national and international level, and are catering to a larger audience by putting in place distribution channels to cater to these markets.

They have tackled the challenges of providing safe and healthy food that are free of artificial flavouring, preservatives and colourants, and have expanded their product categories to newer and more accessible food ranges. By adopting farmer-centric enterprises, brands like Priya have been able to scale up their raw material sourcing from agricultural origins; and Eastern Condiments has tackled the challenge of understanding different regional and localised flavours.

Today, South-based companies are providing product categories that reach regional, national and international markets. Growth looks optimistic, with Double Horse targeting 40 percent growth rate in the next 3 years; Priya is focussing on functional and fortified food to achieve the company's targeted growth, Kaleesuwari is diversifying its product range, and the Eastern Group is undertaking research into food categories that will be the future drivers in the food business.

Southern grocers

With overall retailing in India becoming more organised, modern, and professionally



Foodhall

managed, many medium-scale retail stores such as department stores and supermarket chains have evolved and made their presence felt. Southern retailers have set a precedent by being progressive and forward thinking, and changing the way food and grocery retail was perceived. In fact, modern trade owes its inception to southern India, which established organised retail chains in the food and grocery category long before the concept came to be acknowledged in other parts of the country.

In South India, food and grocery is the largest retail category with names like Nilgiris, Foodworld, Namdhari, MK Retail, Ratnadeep, Nuts & Spices, Shri Kannan Departmental Stores, among other leading grocers, who have expanded their store count across the region. Running alongside are the Mom and Pop stores where business continues unabated as consumers flock to them for their daily/weekly needs.

The urban consumption share does not differ from the all-India averages. It is the same at 44 and 56 percent for food and non-food items, respectively. Also, these averages are higher by around 19 percent than the all-India averages. Food consumption expenditure of urban South India is 27 percent higher than rural consumption expenditure, and on an all-India basis it is 46.7 percent.

Urban Av. MPCE (in Rs)	South India	All India
Food Items	1051.74	880.83
Non-food Items	1319.35	1103.63

SOURCE: NSS 66TH ROUND; IRIS ANALYSIS

Andhra Pradesh takes the largest share in the region's total consumption with 32.7 percent contribution. In south India, out of total annual household spending, 48.3 percent goes to food items.

States / UT	Consumption share in South India (%)
Andhra Pradesh	32.7
Karnataka	21.5
Lakshadweep	0.03
Kerala	17.0
Tamil Nadu	27.8
Puducherry	0.7
Andaman and Nicobar	0.2
South India	100.00

IRIS ANALYSIS

From 2007-08 to 2009-10, the average rural consumption expenditure in the region grew by 57.4 percent against the combined expenditure growth of 49 percent. The urban consumption expenditure grew by 44 percent during the same period. Andhra Pradesh leads the rural, urban and combined growth with 51, 44 and 47 percent, respectively. The total consumption expenditure in Karnataka grew by 24 percent, Kerala by 27 percent and Tamil Nadu by 38 percent.

The various retail formats selling food items in raw, processed, packaged and ready to

Av. MPCE (in Rs)	2007-2008 (Food and Non-Food)			2009-2010 (Food and Non-Food)		
	Rural	Urban	Total	Rural	Urban	Total
Andhra Pradesh	816.19	1549.56	2365.75	1233.76	2237.6	3471.36
Karnataka	818.96	1667.76	2486.72	1020.4	2053.25	3073.65
Lakshadweep	NA	NA	NA	1793.76	2387.41	4181.17
Kerala	1382.92	1947.97	3330.89	1835.22	2412.57	4247.79
Tamil Nadu	834.12	1409.84	2243.96	1159.69	1947.61	3107.3
Puducherry	NA	NA	NA	1636.01	2690.31	4326.32
Andaman and Nicobar	NA	NA	NA	1932.48	2868.91	4801.39

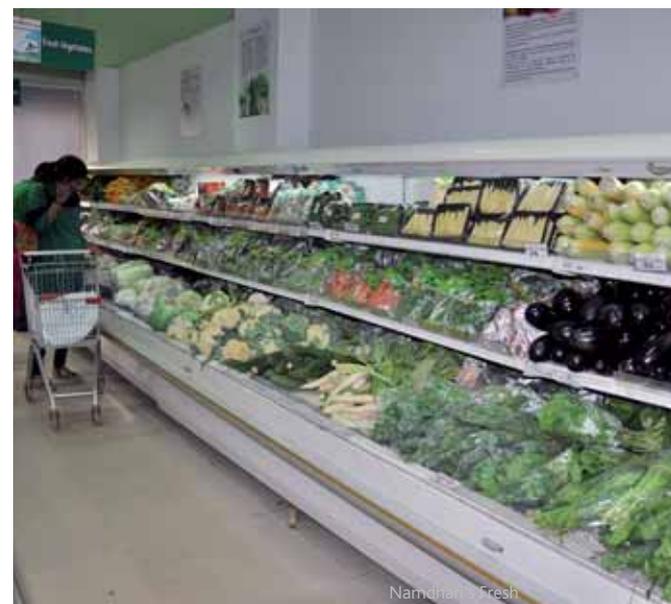
SOURCE: NSS 64TH & 66TH ROUND; UT'S DATA FOR 2007-08 NOT AVAILABLE

consume form are food and grocery stores, supermarkets, hypermarkets and food service restaurants. These modern retail formats provide the food items across brands, labels, categories, sub-categories, cuisines and segments. Presence of these outlets at the regional level has been quiet impressive in present times.

Retail format	Percentage of outlets present in South India	Remarks
Food Service	28	Fast food restaurants, parlours, Kiosks, QSRs, etc.
Hypermarket	30-32	Food and grocery contribute highest in hypermarkets' revenue
Food store and Supermarket	45-50	Small and medium sized store
Total	42	

ANALYSIS BASED ON RETAIL PRESENCE OF NATIONAL PLAYERS ONLY

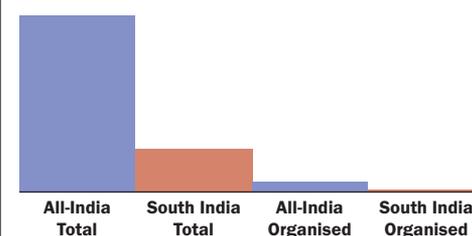
South India's retail market is estimated to contribute around one-fourth of India's total retail market. Modern retail in south India is pegged at 8 percent of the regional retail market, and holds 30 percent share of India's total modern retail. South India has been the birth place of modern retail with traditional players like Spencer's, Food World, Nilgiris, etc, operating even prior to the new age retail revolution in India. Probably, lacking in the technology of the time - the only missing factor - these retailers, otherwise, have been growing by providing regional consumers with a modern retail experience. Unlike today's modern retail, which is more inclined towards fashion and lifestyle products and services, the regional modern retail was led by food retailing. Cities like Bangalore, Chennai and Hyderabad have been the main centres of this change.



Growth in retail in South India can be attributed to the following factors:

- Moderate climate throughout the year
- Better literacy rate and balanced sex ratio have made regional consumers more mature and aware of their needs
- Substantial population visiting the Gulf has raised awareness of modern retailing concepts and aspiration levels for quality products

Retail Market in South India



- Chennai in Tamil Nadu, Bangalore in Karnataka, and Hyderabad in Andhra Pradesh have witnessed fast urban development and a growing youth segment. The region's consumption patterns are hugely influenced by consumers in these metros
- South India has 79 out of functional 130 tax-free special SEZ across four states (AP, TN, Karnataka and Kerala). This has increased jobs, income and consumption
- Due to crossing over of regional barriers, thanks to modern retail expansion, regional consumers have been encouraged to try out products and services from other regions as well.



City Right

Much of the character and sensibility of Whole Foods Market is derived from its location, and the elements and icons of the local community

Whole Foods Market in Detroit, Michigan, USA, is about local, natural, and socially and environmentally responsible commerce. Its location lives up to these principles not only in what it purveys, or through the associates in the store, but also with the environment and its building. Design partners, local artists and fabricators joined with the Whole Foods team to create a fusion of food and place through reclaiming, repurposing and even reimagining pieces of Detroit's past into an expression of Detroit's future.

The environment has key feature areas with a café, a series of specialty stalls for dairy products and cheeses, produce and specialty foods, bakery products, and an aggregate area of prepared specialty foods with local-to-international focus. The character of the store creates an instant connection with the neighbourhood that represents the past, present and future of urban Detroit.

The 21,506 sqft store features an assortment of prepared and ready-to-



Design partners, local artists and fabricators created a fusion of food and place through reclaiming, repurposing and even reimagining pieces of Detroit's past



prepare foods, in conjunction with fresh and specialty perishables for the young urban resident, neighbourhood consumers, and the working population, for whom the store meets their needs for a healthy lunch, shopping for the evening's dinner, or the week's groceries.

Leading retail design and brand strategy firm JGA created an experiential environment, providing design services related to the store's interior, colours, materials and graphics. Said JGA Chairman, Ken Nisch, "With its cross-cultural mix in places like Eastern Market and great restaurants, Detroit becomes a natural home for Whole Foods. The Detroit store celebrates this rich history not only in what is sold, but as well where it's sold and the environment it is sold in."

Design elements

The overall organising background element used throughout the store is a unique street grid of Detroit with radial streets, squares and avenues. This is used in terms of background graphics, cornice treatments, directional signage, etc.

Feature elements within the store include a Bristle wall "Cooking" graphic constructed with sculpted squares of repurposed broomstick material laser cut into a 3D sculpted graphic. Specialty Foods feature a large panel element with a patchwork of reclaimed signs ranging from street, business, advertising and institutions; rescued from faded scrap. A series of metal conduits bent to create a bakery header is reminiscent of tail pipes and Detroit's namesake "The Motor City." Motown

45-LP records become checkout lane markers, reflecting the company's Motown heritage. There is a corrugated metal background for the Cheese Department; a heritage timeline that highlights the city's history, culture, and its ongoing reinvention, and reclaimed elements and furniture pieces from the city's industrial heritage.



■ A Bristle wall "Cooking" graphic constructed with sculpted squares of repurposed broomstick material laser cut into a 3D sculpted graphic



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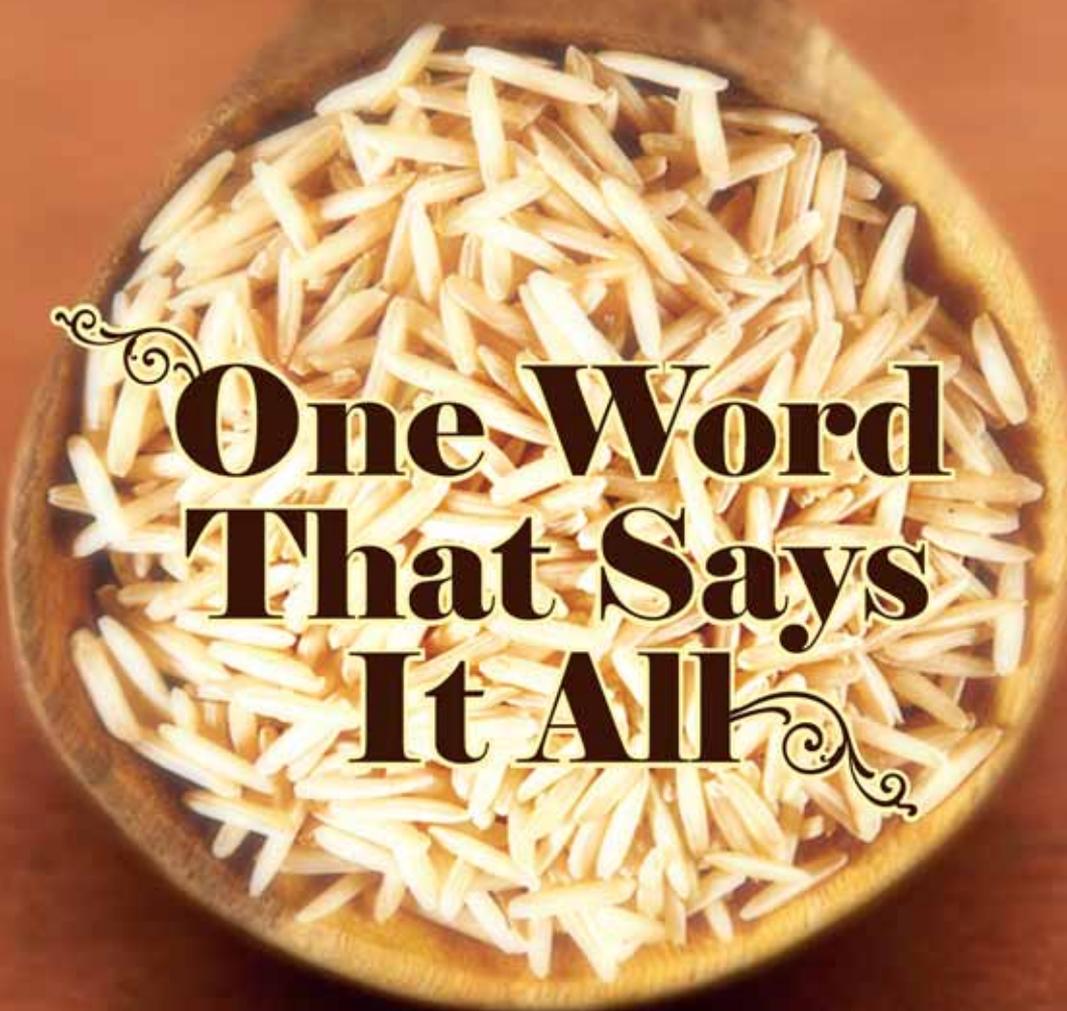
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