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PROGRESSIVE GROCER

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WE ARE FOCUSED ON DELIVERING VALUE AND ASPIRATION

– **Rajeev Krishnan**
Managing Director and CEO, SPAR Hypermarkets



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Subscription

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

ADVERTISING

Business Head

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

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

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

CONSUMER CONNECT

Anil Nagar, Vice President

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

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At a time when the government is urging Indian manufacturing to scale new heights, the opportunities for the food processing sector never looked so bright before. The bright potential stems from a number of drivers. The government has identified the sector as a key catalyst that can help in shifting more and more employment from agriculture to manufacturing. Consequently, there is a strong impetus towards incentivising the development of food processing infrastructure, which is beginning to show positive results. There is also a discerning shift in the preferences of consumers due to rising affluence and hectic lifestyles. These are driving them more towards packaged food products.

As the market is fragmented, there is lots of scope for achieving higher value addition. The government plans to raise the value addition from 20 per cent in 2005 to 35 per cent currently. This is not a tall order and Indian food manufacturers should not let this opportunity go.

India's dual advantages as a resource base as well as a lucrative market are attracting both domestic and foreign players to invest. The fact that foreign PE players are getting attracted to invest in Indian companies is testimony to the long term potential of the industry. Both home-grown and overseas players are increasingly looking at ways to drive innovation and boost value addition of food products. These trends promise to take the sector to an accelerated and more sustainable growth trajectory going forward.



Amitabh Taneja
 Editor-in-Chief

All feedback welcome at editorpgindia@imagesgroup.in

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Mumbai: 1st Floor, Plot No. 111/3, Marol Co-Operative Industrial Estate, Marol Andheri (East), Mumbai - 400 059,

Ph: +91-22-28508070 / 71, **Fax:** +91-22-28508072

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

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



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The Health Push

Rising awareness about fitness and diet is shaping the consumption trends towards health and wellness products. More and more health-boosting products are lining retail shelves as concerns regarding health and well-being are beginning to influence consumers' purchasing decisions. The fast-growing health and wellness industry in India is getting a further boost from modern retail formats.

By **Sanjay Kumar**

Increasing health awareness is bringing about a noticeable shift in the attitude of people towards healthier food alternatives. What we eat, more than anything, has an impact on our health and our well-being. As diet-related risks of mortality have increased, so have the concerns over the nature, composition and source of food products that we consume. Early signs of health hazards, lifestyle related ailments, and increasing cases of obesity have helped to bring this category centre stage in the minds of consumers. Already, India is the diabetic capital of the world. Heart diseases have reached a frightening scale and are a killer. Obesity is rising. All kinds of lifestyle diseases are on a spiral and so there is an urgent need for all of us to eat

better. Also, the urban youth today is more aware and conscious about health and wellness than ever before. Among the older generation, those who are suffering from problems related to a sedentary life such as diabetes and other illness are changing their foods habits from the traditional high glycemic index foods to superfoods that aid in controlling sugar levels and managing weight gain. All these factors explain why consumers today seek fresh, natural and minimally processed foods with beneficial ingredients. Whereas such foods help fight disease and promote good health, consumers are also willing to pay a premium for them.

With people becoming more proactive in finding ways for ensuring better health and overall well being, the result is that the Indian market





is witnessing a growing demand for health and wellness foods. This is where food manufacturers come to play an important role in providing healthy and tasty products to the health-conscious consumer. As the market is expanding, both Indian and international manufacturers of health-based foods are finding a ready market for their products. Health and wellness food companies are targeting the increasingly prosperous middle class consumers who are recording the highest consumption of calcium supplements, foods for cholesterol control, diabetes, heart care, etc. At the same time, retailers too are stacking their shelves with a variety of health foods (also termed as functional foods) such as soy protein, omega 3, green tea, etc, as consumers are opting for them in increasing numbers. “The health & wellness category is definitely seeing a big growth and we have observed a double-digit growth. The category, in our stores, is growing by almost 26 per cent. We have observed around 15 per cent sequential growth in the category and we are still expecting more growth to come because of the increased consumer awareness on health and fitness,” says Manoj Jain, Vice President of Marketing, Loyalty & Visual Merchandising, HyperCITY Retail India Limited.

Health foods today have moved beyond just the breakfast substitutes. More and more consumers are becoming aware of the benefits of organic and natural food, which is chemical free, and hence their adoption is increasing.

Modern trade and e-commerce channels are helping to make such foods available to a larger audience. At the same time, with small meal concepts catching the fancy of the health-conscious, mid-meal healthy snacks and other foods products are also becoming popular with people taking up these options. “Ayurvedic and organic products have been recording maximum growth in the health and wellness category. Currently, we stock ayurvedic, diabetic, sugar-free, gluten-free, quinoa, chia seeds, sorghum, buckwheat, amaranth, and different type of millets in our HyperCITY stores,” reveals Jain.

Wholesome foods

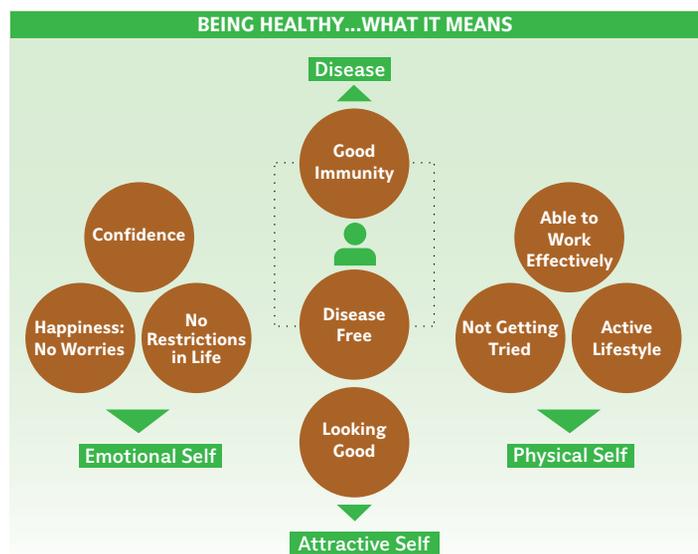
“Today, consumers think of food as critical to their health and wellness. While there is no particular profile, we find health and wellness food consumers are slightly upscale, typically also shop at modern trade, use internet and online shopping regularly, are aware of green initiatives, and travel and pursue interest outside regular work and home. Influencers like health trainers, nutritionists, medical practitioners, chefs, etc., are playing an important role in encouraging more people towards healthy food,” says Kingshuk Basu, CEO, Conscious Food, which is pioneering organic and natural foods company since 1990. The company offers a wide range of high quality and differentiated food items across cereals, grains, pulses, flour, spices, oils, beverages, snacks, etc. Some of its best selling items include raw sugar, cold pressed organic coconut oil, differentiated flours like sprouted ragi flour, seven and six grain flours, bajra and jowar flours, brown rice, rock salt, after meal digestive, flax seeds, apple cider vinegar, Gir cow ghee, various pulses and spices, and a line of oil-free tasty snacks. “All our products are healthy as they are either certified organic or premium natural and both types are chemical free. For example, all our flours are ‘chakki ground’ and all our oils are cold pressed, which help to preserve the nutrients better,” adds Basu.

Companies like FieldFresh Foods Pvt. Ltd., which operates the Del Monte brand and Sresta Natural Bio Products with its 24 Mantra Organic brand have a range of products that cater to the health and wellness segment. “From our imported Italian range consisting of olives, olive oil, durum wheat and whole-wheat pasta to 100 per cent fruit juices and dried fruits range, all our products are in line with the requirements of health-conscious consumers. Olive oil is increasingly considered



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— Manoj Jain
Vice President of Marketing, Loyalty & Visual Merchandising, HyperCITY Retail India Limited





“We deliver an experience that is both focused on value and aspiration”

– **Rajeev Krishnan**

Managing Director and CEO, SPAR Hypermarkets

Rajeev Krishnan, Managing Director and CEO, SPAR Hypermarkets, shares his thoughts with Progressive Grocer on how his retail chain is at the forefront of introducing various innovations and technological enhancements with a view to delivering a fulfilling shopping experience across demographics and age groups. “There is a healthy mix of demographics and age groups that visit SPAR stores and we are doing all that a hypermarket is supposed to do,” he says. During the course of an expansive interview, apart from talking on various aspects of operations at SPAR, he weighs in on many germane matters about hypermarket retailing in India and the way forward for this retail format.





Tell us about your retail operations.

Our parent company, Landmark Group, is a multinational conglomerate involved in retailing of apparel, footwear, consumer electronics, cosmetics & beauty products, home improvement and baby products. The Dutch brand SPAR is the world's largest voluntary retail chain with over 12,000 stores in 40 countries worldwide and meets the needs of over 13 million consumers every day. In India, SPAR Hypermarkets came about as a license agreement between the Dubai-based Landmark Group's Max Hypermarkets India Pvt. Ltd and SPAR International. SPAR is the world's largest independent food retail chain, which operates on the principle of a 'Co-operative of Independent Retailers and Wholesalers.'

What have been your chain's major achievements in India so far?

SPAR Hypermarkets operates over one million square feet area across 18 stores in nine cities, including Bengaluru, Mangalore, Coimbatore, Hyderabad, Delhi, Ghaziabad, Gurgaon, Chennai and Pune. The average store size is 40,000 sq.ft. and, between our 18 stores, SPAR serves 30 million customers annually. Our retail chain had revenues of about Rs. 1,000 crore last year. We are targeting a double digit growth this financial year.



FACT FILE: SPAR

Retailer/ Brand Name:

Max Hypermarkets India Pvt Ltd/SPAR Hypermarkets

Launch year: 2007

Parent company: Landmark Group

Company headquarter: Bangalore

Country of origin: India

Number of employees: 3,000+

Total number of stores as on date: 18

Number of states present in as on date: Seven

Number of cities as on date: Nine

Average foot traffic: Three crore customers annually

How do you see the hypermarket format changing and evolving?

The hypermarket format has been evolving and will continue to evolve. If you think about it, in the last decade alone, this format has gone from about 150,000 sq. ft. to 25,000 sq. ft. It might be fascinating to know that the current hypermarket format that has evolved in India is also being looked at in the West (20,000 to 50,000 sq. ft.). In the current context, challenges will always be there: on availability of space and increasing rentals. As one gets to Tier 2-3 cities, the challenges change to product connectivity and availability. However, the upside is that the customer is there and looking for an opportunity to shop in a great environment. We continue to experiment on our store sizes as we tighten up the understanding of our customers, the cities we operate in, and the categories we build.

What is the typical customer profile at SPAR?

SPAR Hypermarkets' customers are family consumption groups with both value as well as aspirational needs. They range from the affluent segments to the pure value-seeking segments. The majority of customers belong to the 25+ age group. There is a healthy mix of demographics and age groups that visit the stores.

What is the location strategy for your stores – malls or high street?

Generally speaking, most options for hypermarkets in India have mainly been in malls, so we have also gone with the same location strategy. If there were options to be in standalone situations or even create a shopping complex with us as the main anchor, we would always explore the same. We look forward

SPAR Hypermarkets operates over one million square feet area across 18 stores in nine cities. The average store size is 40,000 sq.ft. and between its 18 stores SPAR serves 30 million customers annually.



Engage Shoppers With Digital Devices

Mobile is the linchpin for connections.

By John Karolefski

“
The successful grocers are those who are leveraging their loyalty data to deliver personalized value through their mobile applications for an enhanced in-store experience.”

—Michael Colaneri
AT&T

In the near future, supermarkets will routinely engage shoppers with a variety of digital devices. Setting the stage for this scenario are beacons, digital signage and at-shelf tags being unveiled around the country as stores serve as testing labs for new technologies. Nobody knows which ones will survive and flourish, but one thing is clear: Mobile will be the linchpin of most in-store technology.

Safeway, Kroger, Giant Eagle, Wegmans and other chains are using mobile apps to make the in-store shopping experience relevant. These apps are all tied to loyalty programs and customer-specific marketing campaigns.

“Mobile applications are the most widely adopted technology across the grocery industry, but with varying degrees of functionality, from basic ads, coupons and recipes to m-commerce and BOPUS [buy online, pick up in store] and home delivery,” says Michael Colaneri, associate VP of retail for Dallas-based AT&T. “The successful grocers are those who are leveraging their loyalty data to deliver personalized value through their mobile applications for an enhanced in-store experience.”

Adds Nick D’Alessio, retail solutions development manager for Lincolnshire, Ill.-based

Zebra Technologies, a provider of tracking and printing technologies: “The retail market as a whole is facing the growing demand of connecting with digital mobile shoppers who are time-constrained and like to shop anywhere at any time.”

Many grocers are creating their own smartphone loyalty applications for rewards and coupons, according to D’Alessio, who adds that customer-facing Wi-Fi is being offered to facilitate a better shopping experience, with digital coupons and store maps available.

Mike Puffer, senior director of mobile solutions and strategy for Detroit-based digital marketing company HelloWorld, agrees, noting, “The brands establishing the strongest foundation in mobile and other innovative areas are coming out ahead.” Puffer provides the following evidence:

- Mobile optimized email, SMS and PMMS communications strategies aligned to each phase of the customer life cycle; that is, promotions, circular distribution and rewards
- Strong mobile web experience for finding and navigating stores, and getting coupons
- A mobile app presence that allows users to build a user profile with the brand, access local offers, locate stores, manage their loyalty programs, and integrate with beacons

- Mobile wallet integration for storage of loyalty cards and coupons, and native integration with beacons.

“There are many technologies available today and on the horizon that will enhance the in-store experience,” enthuses AT&T’s Colaneri. “With CPG companies becoming savvier to consumer behavior analytics and loyalty to their brands, these producers will also expect their key distributors to be wise and conscientious about their merchandising. The smart grocers will partner with these companies to bridge the gap between what they know today versus what they will need to know about their consumers and local penetration tomorrow. This will not only drive traffic into their stores, but increase basket size as well.”

The following technologies aim to enhance the in-store experience:

Beacons make connections

Beacons are Bluetooth-enabled devices that connect with partnered smartphones nearby. Beacons rely on apps to receive their signals, which then trigger ads, coupons or product information to be sent to shoppers.

Data released by in Market, a Venice, Calif.-based operator of a beacon platform, show that 38

percent of the 9 million U.S. Millennial moms — those born between 1982 and 2000 — are actively using beacon-enabled shopping apps every month. Trading partners can reach this audience via location-based mobile engagements such as welcome messages when consumers enter stores and calls to action based on specific marketing outreach.

Some stores operated by large chains such as Safeway, Target and Marsh are outfitted with beacons. But now smaller operators are deploying these transmitters as well. For example, Salt Lake City-based Associated Food Stores (AFS) has launched a Shopper Radar mobile app that uses Bluetooth beacons to send alerts to shoppers’ smartphones. Shoppers tap their phone screens to have store credits or digitWal coupons added to their Rewards accounts. To retain the savings, a customer must also buy groceries before leaving the store.

The app is available at several AFS retailers, including Maceys, Dan’s, Dicks, Lin’s, Fresh Market, Blair’s Supermarkets, Broulim’s Fresh Foods, Peterson’s Fresh Market, Soelberg’s, Stewart’s, Bowman’s, Davis Food and Drug, Stokes Fresh Market and Prather’s Market.

Signage points the way

Proponents of digital signage say these systems can increase grocery sales by creating an engaging retail environment. Audiovisual displays aren’t static — they actively involve the customer.

“Some of the immediate benefits include aiding in a shopper’s decision-making process, entertaining customers and strengthening brand visibility,” explains Lou Carulli, marketing manager of YCD Multimedia, which offers digital signage software solutions for retailers. The New York-based company’s software has been integrated in supermarket and hypermarket chains around the world.

According to Carulli, integrating QR codes with digital signage can give customers immediate information on products or specials, and even allow consumers to connect to the digital signage system by mobile phone. This gives local supermarkets the opportunity to use digital mobile alerts to send coupons, promote time-sensitive deals, or even give the exact location of an item or the grocery store itself. It can also help extend the retailer’s social media reach as customers share their deal or purchases online.

“Digital signage is now providing two-way interactivity via integrated mobile apps, beacon technology, analytics, and customer database integration that is growing interest in the grocery space,” affirms AT&T’s Colaneri.

New tags at the shelf

Electronic shelf labels (ESLs) and other shelf tags are drawing interest from appreciative shoppers as more grocers test these devices.

“Shelving technologies can help brands and retailers drive customer engagement and loyalty.”

—Jeff Pinc
Panasonic



Striking the perfect balance

In a candid conversation with Progressive Grocer, Ish Goel, Founder of Shopfilo, an online grocery retail brand, talks about how virtualising grocery shopping has transformed the way consumers shop!



Ish Goel
Founder, Shopfilo

What is Shopfilo.com and how does it work?

ShopFilo is a new-age virtual grocer for the 'I love when I get discount' customers, and for the 'I don't have much time' customers. In simple words, ShopFilo.com is one of the first-to-market discount intensive virtual superstore with 10,000+ products in 800+ categories such as food, groceries, household & personal care to name a few.

ShopFilo has also filed a patent for its unconventional technology which gives the exact same 'touch & feel' experience as that of any brick and mortar store. The company has developed a 'products on rack', 'virtualised basket' and 'product description plates' design logic to offer unparalleled ease of shopping to the customers in today's fast paced world. ShopFilo operates on a hybrid model by strengthening the core procurement infrastructure to ensure unmatched consumer discounts. In Delhi NCR alone, we have partnered with more than 250 distributors, wholesalers, and direct companies for procurement of products.

We also maintain our own inventory, sourced from over 150 companies for ensuring supplies on time.

What inspired you to launch this platform and how did you come up with this idea?

We spent time understanding how customers shop for groceries offline and online. India is price sensitive, but at the same time, the millennials are redefining the ecosystem by creating a balance between the need of convenience and discounting.

We decided to build a virtual grocery shopping platform that has all the advantages of Local Kirana Stores, Modern Trade Stores and Cash & Carry stores, and disadvantages of none – to ensure ease, convenience and economy of our valued patrons.

What is the current ambit and scope of your operations and what are your plans for expanding your footprint?

We have ambitious plans for expansion, but at the same time our focus is on creating a service model that is in line with the expectations of our customer. We are open to making changes/advances to enhance customer delight, hence we will take out time to establish our footprint to other cities in India. Currently, we service Delhi NCR with a catalogue of over 10,000 products which also includes an array of imported gourmet products. By the mid of fiscal 2017, we aim to expand to other tier-1 cities of North/Central India, like Chandigarh, Ludhiana, Jaipur, Bhopal, Indore, to name a few.

In terms of technological tools for providing a competitive edge, what is it that your platform has over other e-commerce marketplace?

ShopFilo has recently launched one of the lightest e-commerce android app, at just 2.37mb using the latest in

Progressive Web Apps technology. Apart from being the lightest app, ShopFilo uses its filed-for-patent unconventional designs that allows for a virtualized experience for the user – products are placed on racks, with description plates below them along with a blue basket on the bottom. ShopFilo's



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rakeshgambhir@imagesgroup.in

Lokesh Arora: +91-9999033612
lokesharora@imagesgroup.in

Delhi:

Ekta Roy: +91-9811635408
ektaroy@imagesgroup.in

Kolkata:

Supratik Saha: +91-9674008699
supratiksaha@imagesgroup.in

Mumbai:

Monark Barot: +91-9560090520
monarkbarot@imagesgroup.in

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