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PROGRESSIVE GROCCER

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WINDFALL FOR THE LARGEST DUTY-FREE RETAILER IN THE SUBCONTINENT

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LUKE GORRINGE
CEO, DELHI DUTY FREE



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The organised grocery business is a very challenging sector. It requires substantial long-term investments and the returns are often not commensurate in the early years. Competition in this sector is growing every single day with new online and offline players entering the market.

Unorganised retail continues to grow with new neighborhood outlets opening literally every day, making this one of the most competitive sectors in the country. The industry also faces massive challenges in procurement, transportation, distribution, infrastructure, investments, technology and manpower.

At the same time, e-commerce is expanding at a frenetic pace and is expected to dominate the future of retailing in urban India. While brick and mortar sector will continue to grow, online retailing will bring in much needed conveniences for shoppers and save on the time that is often spent on travel and navigating in-store shopper traffic.

Despite all of these challenges, retailers who make calculated strategic growth decisions and invest in the right channels will benefit from the potential this sector offers. The Indian grocery sector is currently valued at close to Rs. 17 trillion and that is not a small number. With India's rising population, increased consumption and growing economy, it will continue to be a sizeable opportunity for players resilient enough to stay invested for the long term.



Amitabh Taneja
 Editor-in-Chief

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Delhi Duty Free Services is on a roll. India's biggest duty-free retailer achieved its highest monthly sales in the month of June. The company also recorded its highest daily sales yet, at over \$600,000, besides registering over +50% growth in Shop & Collect sales, and highest ever sales in the beauty and liquor categories.



Luke Gorrige
CEO, Delhi Duty Free →



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Greens Hypermarket Typifies Kannur's Retail Boom

In this coastal district of Kerala, with local retailers modernizing their formats to offer a more wholesome and delightful shopping experience.



CROSS PURPOSES
Mollie Stone's Markets wows with California avocados and Hatch chiles.

Cross-promotional Power

Build bigger baskets with produce pairings.

By Jennifer Strailey

“
Cross-merchandising always has been a great tool, but I think its importance has increased.

— Tom Wheeler
Mollie Stone's Markets

Categories within fresh produce, from avocados to tomatoes to onions, can be strong sellers on their own, but put them together in a colorful display complete with tempting, easy-to-prepare recipes, and sales will surge.

“Cross-merchandising always has been a great tool, but I think its importance has increased,” affirms Tom Wheeler, director of produce operations for Mollie Stone's Markets, a family and locally owned grocer with nine stores in the San Francisco Bay Area.

“It's really about building an idea in the consumer's mind of how they might use the product,” he adds, “and it's critical to reaching the younger-generation consumer. Millennials are super-experimental, but they didn't have home economics [in school] like we did.”

Some of Mollie Stone's most successful cross-promotions to date were achieved with the support of the California Avocado Commission (CAC), based in Irvine.

“We've worked with the CAC for quite a few years, and it's been a huge success for us,” notes Wheeler,

who points to Super Bowl-themed California avocado promotions, a Hatch chiles-and-avocado cross-promotion, and another for Cinco de Mayo.

“Cinco de Mayo was probably the biggest success we've had with a cross-promotion,” he says. “We saw a massive increase in sales year over year.” The promotion featured California avocados, Mollie Stone's in-house guacamole, its private label tortilla chips, and more — all conveniently merchandised together for customers to grab and go.

“Cross-merchandising definitely increases sales,” Wheeler continues. “You can eat an avocado by itself, but it goes a lot better with other things. It's a nucleus for building a bigger basket.”

Mollie Stone's supports its promotions with in-store signage and through social media and recipes on its website.

Whether it's a simple cheese-and-apples pairing or a caprese salad promotion with mozzarella, basil, heirloom tomatoes and Mollie Stone's private label olive oil, the grocer sees value in frequent cross-promotions — so much so that Mollie Stone's recently hired a marketing person to help develop its cross-merchandising plans throughout the year.

Advancing Avocados

In the 18 years that VP of Marketing Jan DeLyser has been with the CAC, the commission has put together hundreds of successful cross-promotions. While each had its merits, DeLyser says there are two key elements that are consistent throughout the most successful examples.

“First, the program must be supported by and be turnkey for the retailer,” she asserts. “Second, the partner products need to make sense together and fit the brand communication.”

While promotions featuring California avocados and tomatoes or fresh-cut salads are natural pairings, spicing things up can also be effective.

“A late-summer cross-promotion with Melissa’s Hatch chiles last year generated a lot of excitement,” recalls DeLyser. “Sometimes a unique idea can bring together two products that may not seem to have a natural fit, and create a successful pairing, such as when we promoted the idea of serving guacamole in a hollowed-out watermelon for the Fourth of July.”

The watermelon and avocado cross-promotion had a “wow factor” for consumers, she says.

Capitalizing on hot trends in avocado usage, from sushi to avocado toast to creative avocado cuts such as ribbons, are also valuable promotional tools, notes DeLyser.

“Retailers can showcase these in ads, social media, demos and via the deli,” she suggests. “Seasonal ideas are an opportunity to bring on the green, such as Big Game spreads, avocado shamrock cutouts for St. Patrick’s Day and avocado deviled eggs for Easter.”

Salad Savings

Shoppers love to save, so pricing is a powerful component of successful cross-promotions in produce.

San Antonio-based NatureSweet reports that one of its most successful cross-promotional partnerships has been its Better Together salad promotion with Fresh Gourmet Baked Cheese Crisps. The program offers consumers substantial savings.

Cross-merchandising the salad pairing outside of the produce department has also contributed to the program’s success.

“Getting our NatureSweet tomatoes to the center store helps to increase basket size for retailers, and is a convenient reminder of fresh ingredients for consumers,” says Brand Manager Lori Castillo.

Repositioning Pistachios

While pistachios have been successfully cross-promoted with beer as a game-day snacking sensation for years, Joseph Setton, of Setton Farms, in Commack, N.Y., is encouraging retail partners to look at new ways of promoting these nutritious and delicious nuts.

“Over the last several years, pistachios are increasingly being promoted as a great-tasting healthy snack. We see pistachios frequently promoted with bottled water and vegetables,” observes Setton, who adds that Setton Farms’ pistachios and pistachio-based products, like its new Chewy Bites, now carry the American Heart Association Heart Healthy checkmark.

Setton Farms is also reaching out to kids and their families with regular cross-promotions of pistachios alongside fruits and vegetables through the Orlando, Fla.-based nonprofit organization Produce for Kids.

Further, for easy cross-promotions anywhere in the store, Setton Farms offers a quarter-pallet bin. “Our pistachio bin is all inclusive for retailers,” he says. “They can just roll it out on the floor, so there’s no labor involved.”

Holiday Delights

While many grocers, including Mollie Stone’s, use cross-promotions to drive produce sales throughout the year, Wheeler admits that the produce department really ramps up on cross-merchandising during the holidays.



“Cross-merchandising is very important during holidays and special sporting events,” agrees Sarah Deaton, of Zespri Kiwifruit North America, in Newport Beach, Calif. “Retailers can place all of the ingredients for appetizers and cocktails together to help promote healthy party foods and drinks.”

Zespri Kiwifruit is extending the availability of Zespri SunGold and Green Kiwifruit through the winter for the first time. Previously, Zespri was available only from May through October.

“The extended availability of high-quality fruit is important as consumer demand increases,” says Deaton. “This demand is driven by consumer education about the health benefits of kiwifruit, as well as discovering just how tasty a premium-quality kiwifruit can be.”



Sometimes a unique idea can bring together two products that may not seem to have a natural fit, and create a successful pairing.

— Jan DeLyser
California Avocado Commission



On a high: The largest duty-free retailer in the subcontinent

Delhi Duty Free Services is on a roll. India's biggest duty-free retailer achieved its highest monthly sales in the month of June. There were other windfalls as well. The company also recorded its highest daily sales yet, at over \$600,000, besides registering over +50% growth in Shop & Collect sales, and highest ever sales in the beauty and liquor categories. Progressive Grocer spoke to Luke Gorringe, CEO, to get a sense of the company's retailing strategy and what it does to make its cash register ring resoundingly month after month. He was joined by Abhijit Das, Head - Marketing, who offered insights into DDFS's marketing game plan and its digital push.

By Sanjay Kumar



The month of June went down with a bang for Delhi Duty Free Services Pvt. Ltd., which runs a cluster of duty-free stores at Delhi International Airport.

The shops retail the best in categories spawning liquor, tobacco, confectionery, perfume & cosmetics, and luxury apparel and accessories. All the shops are located between Arrival and Departure junctions at Terminal 3 of Delhi International Airport. Duty-free shops at airports sell products without duty, i.e., without the local government sales tax added in. At duty-free shops, the size of the duty-free exemption varies depending on the country, but prices are often competitive in relation to what you'd find in a normal store. (The types of products that duty-free shops sell – liquor, cigarettes, perfume, etc – would otherwise attract high excise taxes bumping up their prices.)

For Delhi Duty Free, June proved to be a month in clover with sales climbing to giddy heights, and bringing cheer to its three stakeholders. The three partners in the joint venture are Delhi International Airport Pvt. Ltd. (DIAL), Yalorvin Ltd. – a subsidiary of Dublin-based Aer Rianta International cpt (ARI), a world-wide pioneer in operating duty-free shops globally, and GMR Airports Ltd, which owns and operates Delhi International Airport and Hyderabad International Airport. As an enterprise, Delhi Duty Free is India's largest duty-free retail space and the Terminal it is located in is the sixth-largest single terminal building by floor area in the world.

Highest sales in June

The company posted its highest monthly sales in the past seven years at a time when retailers across the country were by and large circumspect ahead of the GST roll-out and were trying to shake off a prolonged market chill brought about by the demonetization storm. In the travel retail industry as well, business sentiment had remained muted. The past 18 months had seen sure signs of a global slackening in duty-free spend. Various reasons were attributed for the slowdown, ranging from slide in the value of pound sterling due to Brexit concerns and a concomitant strengthening of the rupee against the US dollar. "In spite of such aggravations and the intensifying competition for wallet share of the Indian traveler, we continued to register growth in sales. Delhi Duty Free was able to build on gradual growth during the early part of the year. We moved to double digit growth in the past few months and sales hit a record high in June," says Luke Gorringer, CEO, Delhi Duty Free Services Pvt. Ltd. He has a particular and personal reason to celebrate the June revenue gusher, over US\$ 15 million. The record sales – higher than in the corresponding month last year – comes after he took over his present assignment at Delhi Duty Free in May last year.

The June windfall also saw Delhi Duty Free record its highest daily sales until now, at over \$600,000, besides registering over +50% growth in Shop & Collect sales, and highest ever sales in the beauty and liquor categories. In the latter, a record 53,000 bottles of duty-free Johnnie Walker Black Label were sold in June, which is the highest recorded

The June windfall also saw Delhi Duty Free record its highest daily sales yet at over \$600,000, besides registering over +50% growth in Shop & Collect sales, and the highest ever sales in the beauty and liquor categories.



Over the years, travelers transiting through Delhi International Airport have come to realize that Delhi Duty Free offers a world class store and shopping experience with the best in wine and liquor to tobacco, confectionery, perfume, apparel and fashion accessories.



Luke Gorringer
CEO, Delhi Duty Free



Good Morning to Breakfast Bowl

India's vast market holds a huge potential for the growing base of breakfast foods, which includes cereals like oats, corn flakes, muesli, dalia and mixes of traditional breakfast like idli, dosa and upma, among other choices. Rising urban population, increase in disposable income, and higher consumer health awareness are key sales drivers for the category, which has witnessed healthy year-on-year growth in the past couple of years and retains bright prospects for business in the future. With sales in the category concentrated largely in first- and second-tier cities characterized by fast-paced, modern lifestyles in which convenience and, increasingly, health are prized, players in the breakfast market are focusing on product offerings with enhanced variety and innovation, and on efforts to boost consumer trials and penetration.

By **Sanjay Kumar**

Breakfast in India is considered to be one of the most important meals of the day just like anywhere else in the world. Here, by and large, tradition dictates that breakfast is a family meal where the woman of the house ensures that her family is served a wholesome breakfast at the start the day. Our home-cooked breakfast tradition is quite unlike the norm in America or Europe where grabbing a quick breakfast on one's way to work is very popular and convenient.

According to research done by a leading foodservice operator, as high as 98 per cent of the Indian population prefers to have breakfast at home. The research reveals that there are many reasons why the culture of eating out has not grown in the breakfast segment in India. The out-of-home breakfast market in India is very limited and concentrated mostly in either 5-star hotels or on the street. The mid-segment has been missing, unlike in the West, where a wide choice of options exist at every corner, eliminating the hassles of cooking or cleaning. Cost is another factor here, especially when there is easy access to fresh, home-cooked meals.

The easy availability of a cook or domestic help ensures that it is convenient to eat at home. Also, in deference to tradition, a lot of people choose to eat specific or regional Indian dishes like *parantha*, *aloo-puri*, *dhokla*, *idli-dosa*, etc. These dishes are often perfected to taste in every house and served in a basic home-style manner. So, there is little need to venture out.

Be that as it may, the trend of eating breakfast at home has been changing in recent years. People's lifestyles have been evolving in response to various social and culture stimuli. Consumer insights tell us that India has been witnessing a marked increase in higher

disposable incomes, the number of young adults in the no-kids category is steadily expanding, nuclear families are on the rise, and working hours and commute time too are increasing. All of these factors leave people with very less or almost no time for indulging the traditional, elaborate home-cooked breakfast except, perhaps, on weekends or holidays. Paucity of time and an increased focus on convenience are pushing people to eat out nearly seven to eight times a month compared to three to four times until just a few years ago. At the same time, Indian consumers, in increasing numbers, are gaining exposure to international environments and cultures, which is creating a demand for world-class



products at affordable prices. Today, the profile of the Indian consumer has evolved to being hygiene-conscious, taste-conscious, brand-conscious, experimental and seeking not only international standards but also value. All of these factors are responsible for the shift that we see today in a large number of Indians preferring breakfast on the go rather than sitting down to a home-cooked meal.

While global food habits and practices are gradually shaping the way people engage with food in India, a majority of Indians still prefer breakfast at home to eating out. "Traditional breakfast options continue to be a part of the Indian breakfast table and there is a big segment of people who still prefer home-cooked food for breakfast. However, given the growing importance of health and wellness in our lives, consumers are now making an effort to 'healthify' traditional meal items by using healthier ingredients," says **Mohit Anand, Managing Director at Kellogg India and South Asia**. For the most part, Indians are inclined to consuming their quintessential hot, cooked breakfast. *Parantha* remains a popular breakfast item in north, *idli* and *dosa* in south, flattened rice flakes (*chivdal poha*) with milk in western and central India, whole wheat grits (*dalia*), and a mélange of regional staples in many other parts of India.

Popular Breakfast Foods and Brands

Bread and eggs continue to be a popular breakfast staple for many households. But the choices have increased even in this segment. The range of breads available today include white bread, brown bread, whole wheat bread, multi-grain bread, sandwich bread, multigrain oats and flax, baguette, and croissant. For egg lovers too, there has been an explosion in choice at the retail level – there are brown eggs, white eggs, quail eggs and free-range eggs (cage free) to choose from. Leading egg producers like Venky's and Suguna are making innovations related to packaging, nutritional content (the addition of omega-3s), egg color, and production method (cage-free, organic and free-range). As a result of such initiatives, the market share for organic and cage-free eggs, while small, continues to rise as egg companies increase their focus on cage-free egg production.

Apart from bread and eggs, supermarkets across the country are reporting growth in sales across many breakfast categories. At Foodworld, a chain of supermarket stores, which is owned by Hong Kong based Dairy Farm International Holdings Ltd, the breakfast cereal range has been performing well with offerings that include muesli, all bran wheat, corn flakes, ragi flakes, almond corn flakes, strawberry corn flakes, granola, Special K (for women), and millet muesli. In the oats category where Quaker, Kellogg's, Saffola and Bagrry's are its top performing brands, the chain has been recording good sales for classic oats, masala oats and oats shake. In the millets category, brands such as Manna, 24 Mantra, Organic Tattva, and Arya are the sales pullers at Foodworld, which rakes in about 3% of its overall sales from breakfast category.

Alongside good sales of breakfast cereals, the chain has also seen an impressive show put up by Indian breakfast mixes comprising products like upma mix, rava idli mix, rava dosa mix, vada mix,



At Bagrry's, we have been innovating our oats category and have created oats for atta, suji and poha. The idea behind these innovations is to make oats a staple for Indian consumers.

— **Aditya Bagri**
Director, Bagrry's India



Titans of the trade

Ganesh Mishra, Head Commercial, Trent Hypermarket Pvt. Ltd, has his fingers on the pulse of shifting shopper trends and the canny business sense to make changes accordingly with regard to assortment, promotions and planogram in a way that delivers on both sales and margin targets.



One trend that is clearly emerging is that shoppers are moving towards healthier choices and more natural products.

— Ganesh Mishra
Head Commercial, Trent Hypermarket Pvt. Ltd.

Experience in retail

About 11 years in the retail business.

Your current job and designation

I am designated as Head, Commercial, and I handle category management of the grocery business and also part of the general merchandise at Trent Hypermarket.

Role and responsibility

The primary accountability is to drive my category teams to deliver on the sales and margin targets. Also, I am accountable for developing and executing the overall category strategy, lead supplier relationship and develop a joint business plan with key national and multinational suppliers. Responsible for analyzing emerging shopper trends and preferences and accordingly make changes in assortment, promotions and planogram to meet the changing needs of shoppers. As a people's manager, I am also responsible for developing the capability of the commercial team and put in place the right talent, structure and size to support the business growth.

Area of specialization and excellence

I have handled the FMCG business for a long time in various roles. So I can say that I understand this business well. I strongly believe that if I have to continuously excel in something, it should be on the 'people' front. Our business is all about people – be it our team, suppliers or our customers. We need to have a better understanding and relationship with each one of them and to win with them. Treating people with respect is one of our values and that is embedded in our culture here.

Challenges in the current role

The challenges are typically with regard to the decisions on trade-offs that have to be made – sales versus margin, one brand vs. the other, range vs. space, etc. It's a challenge because we would love to maximize on both but that is not so easy.



Ganesh Mishra
Head Commercial, Trent Hypermarket Pvt. Ltd.

Solutions to the challenges

We have probably the leanest team amongst all the multi-format retailers and with that we have been able to support our growing business. This has been possible because of the revised commercial team structure, which has helped us to effectively move out repetitive jobs like data fetching, etc. We have deployed a good model for making new launches successful. We call it the Five Star launch. All Five Star launches have over-delivered on the KPIs agreed with the brands and have out-performed the market.

Most satisfying part of your job

The best part is working with my team to co-create business ideas with suppliers and landing them in stores for shoppers and then seeing the results. This requires creativity, strategic thinking, ability to take risks and, finally, good execution. And when all of them come together as planned and achieve great results, it brings us utmost satisfaction.

Observations about the category

The shopper's behavior in each category is very different and it's changing quite fast. One trend that is clearly emerging is that shoppers are moving towards healthier choices and more natural products. At the same time, they are also looking for indulgence. Premiumization is happening across categories. Value-seeking behavior is on the rise.

Prediction of future trends

Health, Indulgence and Premiumization are the hot trends.

Your learnings from this sector

The key learning has been with regard to the shopper behavior and customers' response to various stimuli and how it differs from one category to another. I have seen great strategies of different brands in action and the shopper's response to them. This learning, I think, only the retail sector can provide. The cost-efficient processes that we have developed over a period in the business has been another big learning.

What's your goal in the job

The main goal is to strengthen our position as the preferred retailer for our shoppers. **PG**



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