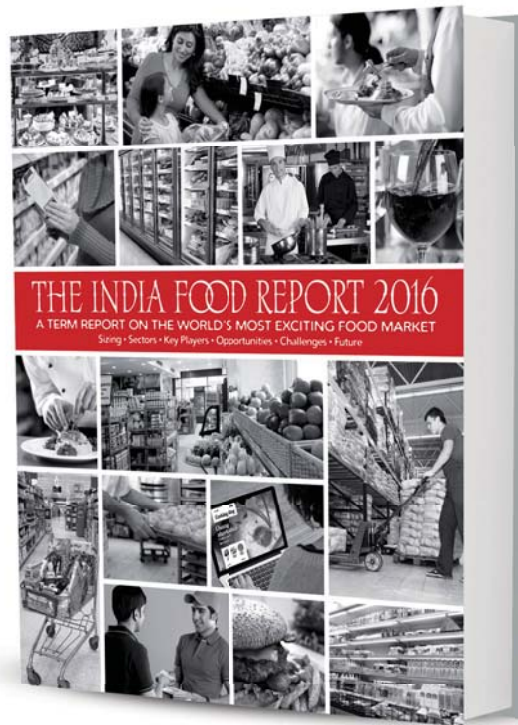


# contents



## SECTION 1: INTRODUCTION & OVERVIEW

1.1	India's Food Sector .....	22
1.2	Food Grocery Market .....	28
1.3	Dry Food Grocery .....	42
1.4	Dairy.....	48
1.5	Spices.....	54
1.6	Fresh Produce .....	56
1.7	Perishables .....	62
1.8	Beverages .....	68
1.9	Other Processed Foods.....	74

## SECTION 2: PROCESSED FOOD

2.1	Food Processing: Advantage India.....	82	2.5	Sweet Indulgence.....	114
	By India Brand Equity Foundation (IBEF)			IMAGES Report and Research Analysis by Euromonitor International	
2.2	Competitiveness of India's Food Processing Sector .....	92	2.6	Ready to Eat / Ready to Cook.....	118
	By Amit Kapoor & Sankalp Sharma, Institute for Competitiveness Analysis			By P. Rajan Mathews	
2.3	Investment Opportunities in Food Back-End Operations .....	102	2.7	Meeting the Challenges of Nutritional Transition .....	122
	By Debashish Mukherjee & Subhendu Roy, A.T. Kearney			By Arabind Das	
2.4	Health & Wellness Foods: The Marketer's Recipe Book.....	108	2.8	Rising Bakery Industry.....	126
	By Dolly Jha & Rishi Sharma, Nielsen India			By Ravindra Yadav, Reetesh Shukla & Tripti Bisht	

## SECTION 3: GROCERY RETAIL & MARKET

3.1	Food & Grocery Retail - Industry Trends and Insights .....	138	3.3	Online and Kirana -The Odd Couple .....	158
	By Baqar Iftikhar Naqvi, Avnish Malhotra & Varun Chugh, Wazir Advisors			By Prof. Piyush Kumar Sinha, Prof. Srikant Gokhale and Saurabh Rawal, Indian Institute of Management Ahmedabad (IIMA), India	
3.2	Rising Share of E-Grocery in India .....	152	3.4	How Technology is Powering the Retail Bandwagon.....	168
	By Dr Sandeep Puri, Abhijeet Gaurav and Rajat Agarwal, IMT Ghaziabad			Images Report	



# THE INDIA FOOD REPORT 2016

## SECTION 4: F&G RETAILERS

- 4.1 Retail Majors ..... 174
  - 4.2 Regional Retailers ..... 192
- 

## SECTION 5: TRENDS IN CONSUMPTION

- 5.1 Structural Shift in India's Food Consumption ..... 200  
By Mridusmita Bordoloi & Rajesh Shukla  
People Research on India's Consumer Economy (PRICE)
  - 5.2 India's Changing Rural Markets:  
How FMCG Companies Can Win Over  
Aspiring Rural Consumers ..... 218  
By Sanjay Dawar & Raghuram Devarakonda, Accenture
  - 5.3 Why Don't Big Businesses 'get' it? ..... 226  
By Rama Bijapurkar
  - 5.4 The Will of Food: Understanding the Food &  
Beverage Motivations in Modern India ..... 232  
By Soumya Mukhopadhyay, Ranjana Gupta & Gurpreet Wasi,  
IMRB International
  - 5.5 Why We Buy:  
Decoding Food Buying Behaviour ..... 244  
By Soumya Mukhopadhyay, Ranjana Gupta & Gurpreet Wasi,  
IMRB International
  - 5.6 Exotic's Place of Pride ..... 248  
By Tarun Jain & Ravindra Yadav
  - 5.7 The Organic Age ..... 250  
By Sunil Kumar
  - 5.8 Tracking the Milky Way ..... 254  
By Sam Allen, Canadean
  - 5.9 Brewing Success ..... 260  
By Tarun Jain & Reetesh Shukla
  - 5.10 Nuts about Dry Fruits ..... 264  
By Ravindra Mehta & Avinash Kant Kumar
  - 5.11 All Things Hot ..... 268  
By Sam Allen, Canadean Research
- 

## SECTION 6: FOOD & TECHNOLOGY

- 6.1 The Impatient Consumer,  
IoT and the Food of Everything ..... 272  
By Harish Bijoor
- 6.2 Disruption in the Food Industry-  
Rise of Food Tech Startups ..... 280  
By Sachit Bhatia, Troika
- 6.3 Product Recall -  
The Big Challenge for Food Businesses ..... 286  
By Charu Khanna, GS1 India
- 6.4 Managing Global Food Chain Risks ..... 296  
By Ajay Kakra, PwC India
- 6.5 Sustainable and Inclusive Supply Chains-  
a Key Business Driver for Food Industry ..... 304  
By Asitava Sen & Barry Lee,  
International Finance Corporation (IFC)

## SECTION 7: FOOD SERVICE

<b>7.1 Indian Food Service Market Overview.....</b>	<b>314</b>	<b>7.8 Franchising Fervour .....</b>	<b>356</b>
By Suman Dabas & Ravindra Yadav, Technopak Advisors Pvt. Ltd.		By Kavitha Srinivasa	
<b>7.2 Intensifying Competition .....</b>	<b>326</b>	<b>7.9 Scientific Service .....</b>	<b>360</b>
By Maple Capital Advisors Research		By Mini Ribeiro	
<b>7.3 Indian Homegrown Restaurants .....</b>	<b>334</b>	<b>7.10 Social Media Power .....</b>	<b>364</b>
By Prof. Piyush Kumar Sinha and Anshul Mathur, Indian Institute of Management Ahmedabad		By Annie Johnny	
<b>7.4 Experiments for the Palate .....</b>	<b>342</b>	<b>7.11 Supply's Strength &amp; Support .....</b>	<b>368</b>
By Rachna Nath		By Manisha Bapna	
<b>7.5 What's on the Plate? .....</b>	<b>346</b>	<b>7.12 Biryani or Pizza Choice for QSR .....</b>	<b>382</b>
By Puneet Verma		By Team D'Essence Hospitality Advisory Services Pvt. Ltd.	
<b>7.6 Goal Vegetarianism .....</b>	<b>350</b>	<b>7.13 Making the Right Choice .....</b>	<b>390</b>
By Mini Ribeiro		IMAGES Report	
<b>7.7 Scaling Up.....</b>	<b>354</b>	<b>7.14 Amping up Efficiency Standards.....</b>	<b>392</b>
By Manisha Bapna		IMAGES Report	

## SECTION 8: DEVELOPING A VISION AND STRATEGIC PLAN

<b>Amit Burman .....</b>	<b>398</b>	<b>P. Rajan Mathews .....</b>	<b>412</b>
Chairman, Dabur India Ltd. / Lite Bite Foods		VP - Marketing & Sales, Desai Brothers Ltd. - Food Division (Mother's Recipe)	
<b>Krish Iyer.....</b>	<b>400</b>	<b>Sougata Basu.....</b>	<b>414</b>
President & CEO, Walmart India		Head of Marketing, Innovative Foods Ltd (Brand Sumeru)	
<b>Prakash Nedungadi.....</b>	<b>402</b>	<b>O P Khanduja.....</b>	<b>416</b>
Group Head, Customer Insights & Brand Development, Aditya Birla Group		Business Head, DS Spice Co. Pvt. Ltd.	
<b>Ramanathan Hariharan .....</b>	<b>404</b>	<b>Ajay Katyal .....</b>	<b>417</b>
Director, Landmark Group		President - Organics at Amira Pure Foods Pvt. Ltd	
<b>Saurabh Sanyal .....</b>	<b>406</b>	<b>Oliver Mirza .....</b>	<b>418</b>
Secretary General, PHDCC		MD, Dr. Oetker India Pvt. Ltd	
<b>Rohan Kichlu .....</b>	<b>408</b>	<b>Sahil Gilani .....</b>	<b>419</b>
Director F&B, The Park Hotels		Director - Sales & Marketing, GITS Food Products Pvt Ltd	