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CUSTOM STRATEGY

Hyderabad-based Ratnadeep Supermarkets deploys some uniquely traditional tools to operate a successful modern format

Sandeep Agarwal,
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Ratnadeep
Supermarkets

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I have to admit I never thought it possible. The rise of e-commerce, especially in a category like food, continues to surprise me. Although, when one thinks of it, in a country like India, where much of urban consumers' groceries is delivered home by kirana stores, is an online delivery model really so baffling?

Having said that, what is intriguing is that much of the progress in this direction is currently being made by pure-play online marketplaces, and not by operational brick-and-mortar brands. One would imagine that the latter would have had some first mover advantages in progressing to the online retail model, but that is not the case. Now contrast that to the situation in the UK, where SIX of the top nine online retailers (across categories) last year actually started out as brick-and-mortar players. At the number two position is Tesco, next only to... you guessed it, Amazon. Tesco's recent troubles notwithstanding, you've got to admit this is a remarkable adaptation by an established, 'old-world' retailer to the realities of a new marketplace.

Tesco is today a clear leader in the UK online grocery market, having used in-store technology in tandem with extremely defined digital marketing. You can find any number of analyses on Tesco's re-invention as a leading omni-channel grocer, but the point is: Can you make this alternate world work for you? Some of our retailers are in denial, and some are 'waiting and watching'. The truth is, the online channel gives you access to thousands of more customers than you will ever meet in your stores. Should you not be targeting them already?


Amitabh Taneja
 Editor-in-Chief

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Leaner and Meatier

After the sale of Sumeru and Keya, a trimmer Amalgam Speciality Foods is focussing on what it does best

By Nupur Chakraborty



A family-held food group spearheaded by Abraham J Tharakan, Amalgam was established in 1977. By 1995 it had grown to be one of the largest seafood exporters from India with eighteen factories located on both the West and East coasts of India. Amalgam was the pioneer in setting up India's first processing plant for Individually Quick Frozen cooked seafoods (ICF), the first Freeze Drying facility in India (AFDC), the first Shrimp Feed mill (HIC), and the first Cold Chain Logistic operations (Snowman Logistics) on a national scale.

Amalgam Group was also a founding partner of Snowman Logistics back in 1997, and gradually diluted their stake by 2006, because company wanted to focus on the frozen food business.

In the new millennium, Amalgam downsized its commodity-based seafood operations and diversified into a range of processed foods, including frozen vegetables, prepared seafoods, ready-to-fry frozen snacks, frozen Indian breads, heat-and-serve frozen curries, pickles, retorted curries and meals, speciality ice creams under the Sumeru brand name.



A few years on, the company began marketing a range of dried spices and culinary herbs, soups and snacks in retail packs under the 'Keya' brand name. These two brands now have well established presence across modern trade formats and are slowly establishing its presence in the United States, the European Union, the Middle East and the Far East.

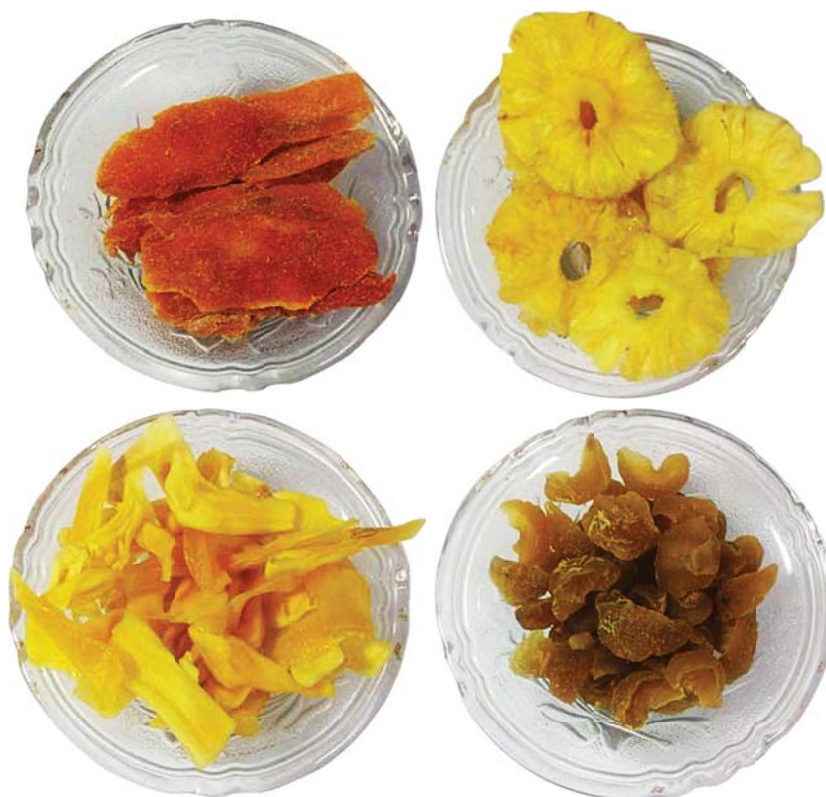
Amalgam is the joint venture partner of Nissin Foods in their instant noodle operations in India. Along with Nissin Foods and Itochu Corporation of Japan, Amalgam processes and export freeze dried seafood, fruits, spices and culinary herbs. The company also produces a range of seafood extracts and powders for export.

A second coming

Over the years the Group has restructured its focus from ingredients for both the food and feed industry and is now concentrating on the Indian domestic retail market with its frozen and ambient food brands. After the sale of Sumeru and Keya, the company has now re-introduced itself in the Indian retail Market under the brand "Buffet" catering only to the frozen foods segment.

"Keya's transition into the Buffet brand began in July 2014. By November, the Buffet range was in stores, offering 55 SKUs. We are on course to adding 35 new SKUs in the next two months," says Sundeep Kurian, business head, Amalgam Speciality Foods Pvt Ltd.





Dry Spell

Dehydration of fresh produce: the next big thing in India's food processing industry?

By Mehak Sharma

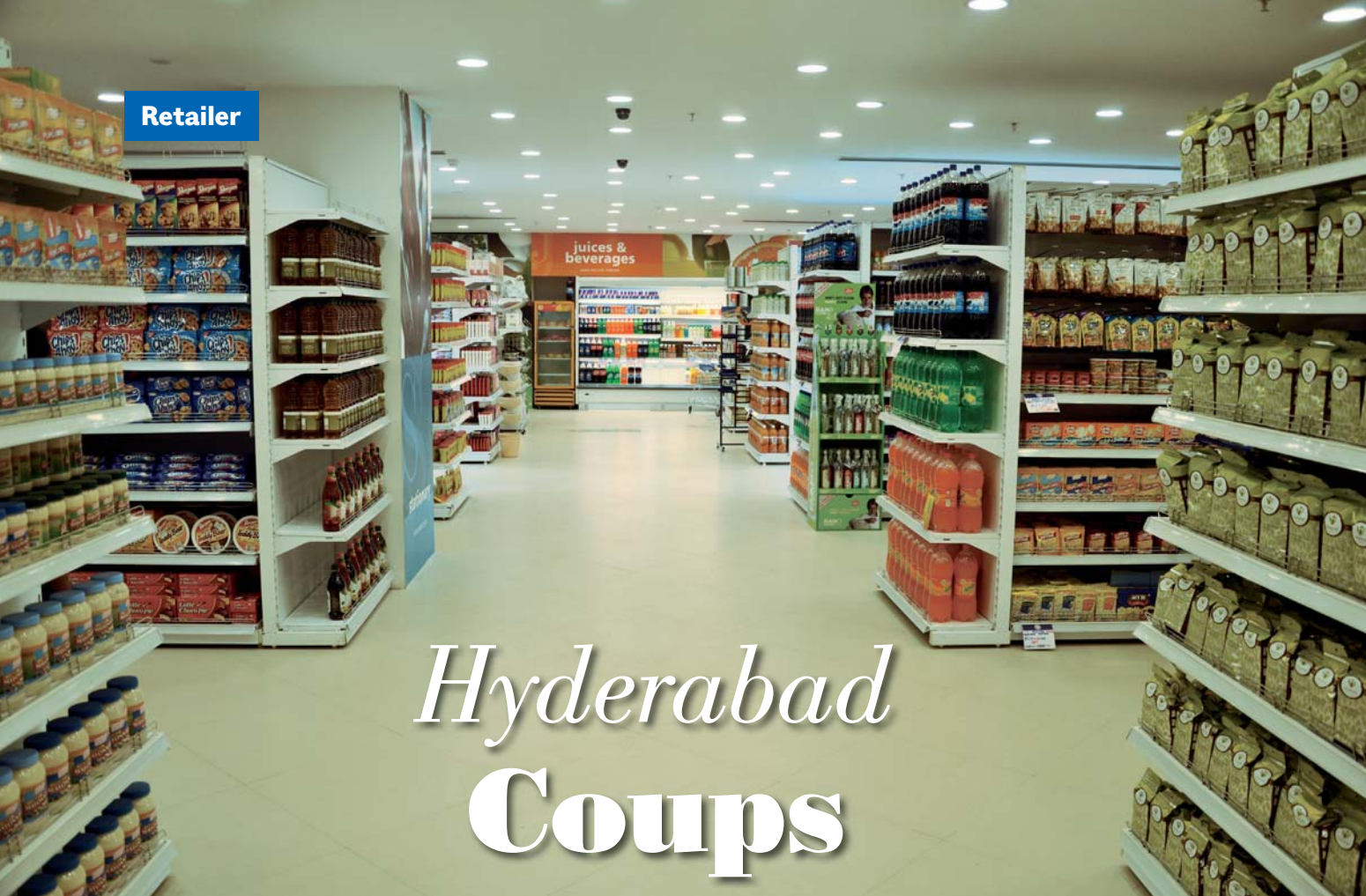
How about eating fresh fruits and vegetables without even worrying to wash or cut them? Or being able to access favourite seasonal fruits through the year? The modern world Indian consumers nowadays live in is very demanding. All urban Indians now know the feeling of waking up early to avoid the morning rush and almost never find time to plan anything ahead, least of all the meals of the day. Convenience foods, as the heat and eat and ready to eat products are broadly known as, are therefore becoming the norm. Their twin benefits also include bypassing dependence on high-calorie, low-nutritive junk food.

Preserving available food through processing is the oldest and most cost-effective step to ensure food security for an entire population. This plays an important role in maximising the potential capacity of the primary production sector – agriculture – in order to stabilise food supplies throughout the year.

The contribution of the Indian food processing industry to the country's gross domestic product at 2004-05 prices in 2012-13 amounted to INR 845.22 billion. The industry has grown annually at 8.4 per cent for the last five years, up to 2012-13. This makes the food processing sector, one of the largest business segments in India in terms of production, growth, consumption, and export earnings.

Operating in a category that is largely export-driven, the agri and food products division of Chennai-based Pee Pee Appliances is now focusing on manufacturing and distribution of dehydrated food products for the domestic market at par with its export volumes.

"We have clearly seen a large consumer base for dehydrated food products in India. For today's time-poor consumers, we provide an easy solution of having a balanced meal a day through our dehydrated product range of fruits, vegetables, dry



Hyderabad Coups

A unique mix of tried-and-tested systems and modern strategies feeds Ratnadeep Supermarket's differentiation in a competitive landscape.

Sandeep Agarwal has been hands-on at Telangana-based Ratnadeep Supermarkets since 1991, when he first came on board at the chain's then only store in Hyderabad. In the 24 years since that first day, Agarwal has had a journey into retail that has been exciting, challenging, humbling and rewarding by turns, as he narrates to Nupur Chakraborty

“I started out at Ratnadeep while I was still in college. I was a complete novice at every aspect of professional life, let alone at retail as a business,” Agarwal reminisces. “The fact that I learnt everything on the job, made mistakes and learnt the corrective actions on the way, is what drives my emotional ‘ownership’ of this business.”

And he's come a long way from those early, chaotic days. Established in 1987, Ratnadeep Supermarket currently has 23 outlets across Hyderabad and Secunderabad, occupying a total retail space of 1,06,593 square feet, and registered a total turnover of Rs 329.43 crore in financial year 2014-15. In calendar year 2014, the chain added four new outlets to its repertoire, while also

boosting its daily average sales per square feet to Rs 80 from Rs 73 in the previous year.

The business's biggest game-changing moment happened in 1996-97, Agarwal says. “These were the early days of modern supermarket formats in India. We were quite content until then, but around this time, we noticed the completely new supermarket formats. We visited Chennai to check out the RPG (early-day Spencer's and FoodWorld) formats and that literally changed our outlook and understanding of retail,” he explains.

The eye-opening observations led to Ratnadeep's transformation into a modern-day food, grocery and FMCG retailer with the merchandise mix, navigation and customer experience befitting an ‘organised’ retailer, Agarwal discloses.

Different strokes

One unusual – but functional – feature of the chain is that it operates 28,000-plus SKUs in its stores without the support of an ERP platform, something that Agarwal confirms is a deliberate strategy. “Our supply chain effectiveness is very high; this gives us high fill rates and ensures product freshness. Company-owned trucks maintain the route delivery matrix to all our store locations like clockwork,” he adds.

“We are perfectly able to manage 28000-plus SKUs in our stores sans the support of an ERP platform and through our 80,000 sq.ft warehouse. We have defined store-wise assortment mixes along with unique/customer-friendly planogramming and navigation methodology across all outlets,” Agarwal elaborates.

The merchandise mix is large, compared with other similar formats, he adds. “SKU count varies from 8,500 to 28,000-plus, depending on store location and catchment.”

Yet another departure from the norm is a loyalty programme without the use of a physical card. “We are proud to operate a reward/loyalty programme for customers without any cards. The customer’s mobile number is the unique key identification, and this has been implemented from December 2013 across all our stores,” Agarwal says.

The retailer currently has a customer base of 4.5 lakh customers in the Ratnadeep aGAIN rewards programme. Customers are typically rewarded through mobile text messages and Facebook notifications from time to time.

Customers – tracked by the registered mobile number – are able to earn 1 reward point on every purchase of Rs 100. These points can be redeemed later to avail discounts on future transactions.

Customers can check for their total points from the checkout counters by providing the aGAIN membership number, and alternatively, on the company website (www.ratnadeepsupermarket.com) or on its Facebook page (www.facebook.com/ratnadeepsupermarket). The retailer also has an aGAIN app specifically designed to enhance the rewards programme experience.

Manned by 1,400 employees, the chain also prides itself on being an employer of choice in Hyderabad. “Our attrition rates are absolutely minimal compared against the industry average,” Agarwal asserts. “This is driven by the management focus on developing, nurturing and rewarding talent and staff loyalty.”

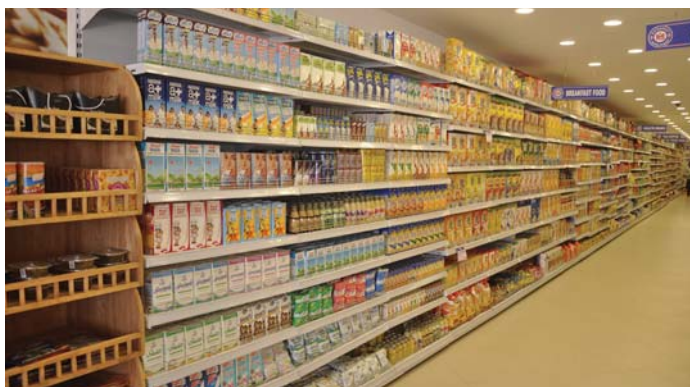
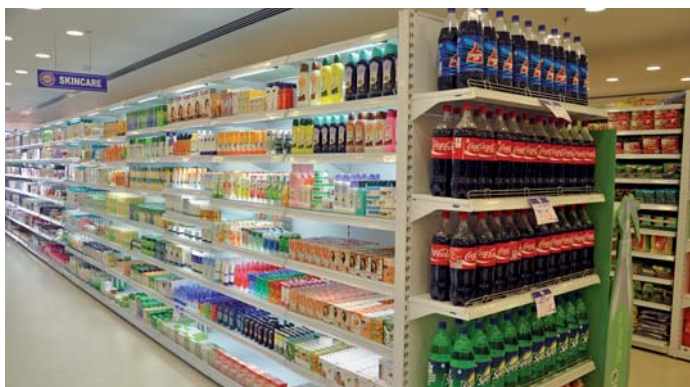
What’s next?

So while Ratnadeep has successfully expanded across a highly competitive supermarket landscape, does Agarwal have any regrets about some things



Sandeep Agarwal,
Managing Director

Ratnadeep Supermaket	1st January 2013 – 31st December 2013	1st January 2014 – 31st December 2014
Total No. of Outlets	19	23
Total retail Space (in sq ft)	88950	106593
Presence: No. of Cities	2	2
Annual Turnover (from all outlets) (in INR Lakhs)	23,376	24,782
Average Sales Per Sq Ft per day (in INR)	72.82	80.17
Same Store Sales Growth %	25.32%	26.52%





Game-changing moves in coffee industry

The Coffee Board of India is taking key initiatives to bring sustainable farming practices to coffee cultivation in India, and nudge the industry towards greater adoption of certified coffee norms

By Angel Kashyap

Coffee consumption was once confined to South India, but now coffee has emerged as a Pan Indian beverage that is used commercially in cafes as well as domestically at homes. Coffee cultivation is done under a canopy of thick natural shade, which in India is found in the regions of the Western and Eastern Ghats. The production of coffee beans is carried out on large plantations and also by small farmers. However, coffee is an expensive crop to grow, given that its production is very labour intensive and requires attention to a lot of details. As such there are various challenges that the coffee industry faces, and the problem of shortage of labour and water wastage are amongst the most acute.

Recognising the problems surrounding coffee as a crop and those faced by coffee growers, the Coffee Board of India has taken various initiatives like the one on introducing Eco-pulpers, also referred to as Ecological Pulping Units or Ecological Washing Stations. These units reduce wastage of coffee, bring down water consumption, and abate water pollution.

Towards sustainable coffee cultivation

The eco-pulpers are provided to small groups of coffee growers at subsidised rates, thanks to a tie-up between the Coffee Board and the Indian Institute of Plantation Management (IIPM). While the Coffee Board offers 40 percent subsidy on the market price of eco-pulpers, IIPM pitches

in with another 15 percent subsidy. The initiative has helped to support producer organizations of coffee growers in India who have not been able to operate in a sustainable and viable manner. SHGs (registered under the State-level Societies Registration Act) have been promoted by the Coffee Board since the year 2002. SHGs, short for “strictly high grown”, refer to coffee grown at higher altitudes. Beans grown at high altitudes mature more slowly and grow to be harder and denser than beans grown at lower elevations. The inherent consistency and taste attributes of high grown beans makes them more desirable, and generally more expensive, than coffees grown at lower elevations. About 125 coffee grower SHGs are being supported in the states of Karnataka, Kerala and Tamil Nadu.

However, most of the SHGs have not been undertaking commercial activities for the benefit of the groups’ members. Therefore, IIPM has identified a few operating SHGs and is supporting them to obtain eco-pulpers and certifications. Dr Aswini Kumar, Research chair, Coffee Board of India and IIPM, Bangalore, says, “Eco-pulpers can reduce water consumption by 80-90% for coffee pulping and washing resulting in reduction in avoidance of pollution of millions of litres of water annually.”

“In India, currently, seven firms are involved in supplying eco-pulpers. However, the smallest eco-pulper (1500 kgs of fruits per hr), fitted with a diesel generator, costs a minimum of Rs. 11 lakh. The largest eco-pulper (5000 kgs of fruits per hr) costs about Rs. 35 lakh,” Kumar informs.

“In India, eco-pulpers are being sold by private entities since the last seven years. These pulpers are of large capacities, (approximately about 1500 kgs of ripe coffee per hour) and are expensive, resulting in their adoption being limited to very large plantations. Thus, the smaller plantations continue to use conventional pulpurs,” Kumar concludes.

However, in the last 2-3 years, the State Pollution Control Board has adopted stringent measures towards such pulpurs and has also confiscated many polluting pulpurs. Therefore, to address this problem and taking into account the imperative to introduce more environment-friendly eco-pulpurs, the joint initiative by the Coffee Board and IIPM will go a long way in providing succor to the sector.

In another major initiative, the Coffee Board has entered into a joint initiative with the Netherlands-based UTZ, which is an independent, non-governmental, non-profitable organisation dedicated to create an open and transparent marketplace for socially and environmentally responsible agricultural products. As there are factors such as soils, climate, altitude, and the care with which the labour-intensive crop is handled throughout the year, affecting the quality of coffee at the level of farming, sustainable farming

methods in coffee production and trade has assumed critical importance. Sustainable practices are therefore the need of the hour as it generates economic value, reduces poverty and inequality, replenishes the environmental resource base.

Globally, coffee cultivation and trade is moving toward “certified” coffee, a benchmark that confirms that coffees have been sourced ethically and produced in a responsible way and the people lower most in the chain have been taken care of. To mitigate the problems coming in the way of increased coffee cultivation and production and to accomplish its goals of improving the quality and reputation of coffee produced in the country, the Coffee Board of India has allied with the UTZ, which runs the largest sustainability program active in the Indian coffee sector.

The alliance with UTZ will help to bring more of coffee cultivation under the UTZ Certified label for sustainable farming. The eco-label stands for sustainable farming and better opportunities for farmers, their families and our planet and its program enables farmers to learn better farming methods, improve working conditions and take better care of their children and the environment.

UTZ Certified is associated with 500,000 small growers and 400,000 farms. In India, UTZ has its presence at tea and coffee plantations spanning from Darjeeling to Kerala besides pockets of

The benefits of UTZ certification are:

- **Price premium**
- **Improvement in product quality due to better primary processing**
- **Awareness of coffee handling and storage**
- **Higher rates of labour retention due to housing and safety initiatives**
- **Better environmental conditions in the farms**



Western Ghats coffee farmers waiting to receive the Ecopulpers

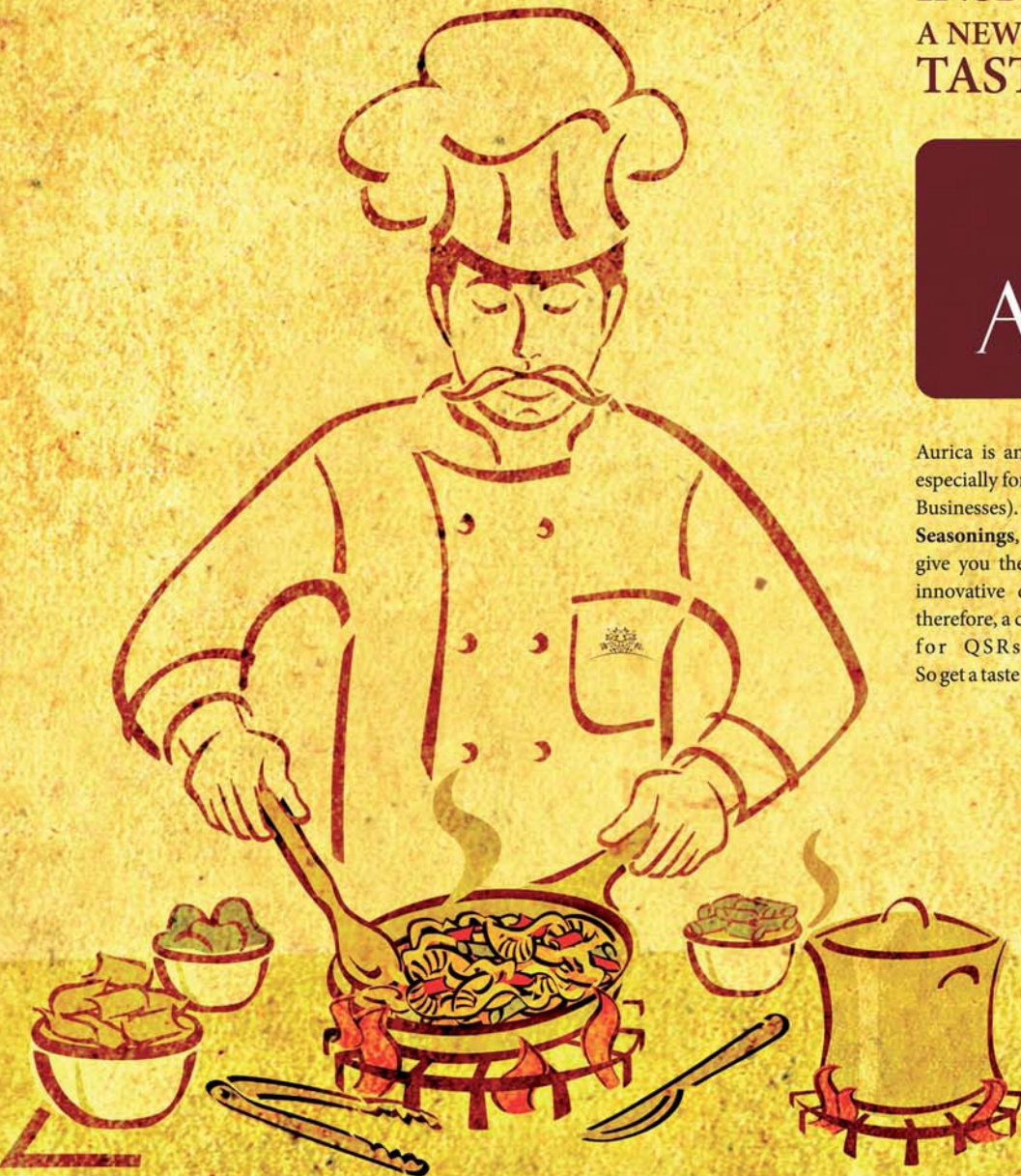


Dr Aswini Kumar B.J., Coffee Board Research Chair, Indian Institute of Plantation Management, addresses coffee growers about the advantages of Ecopulpers

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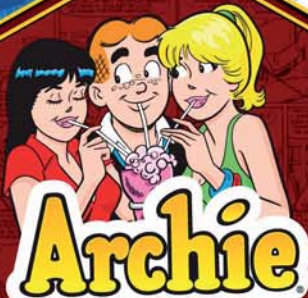


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