

# PROGRESSIVE GROCER

APRIL 2012

AHEAD OF WHAT'S NEXT

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INDIA EDITION

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## India's large food bowl

Nothing can put a damper on food consumption in India - not the scare of an economic downturn, not the inflation woes and worries, nor a lacklustre Budget.

In fact, the market is seeing increased activity in the food and grocery retail sector with the entry of more and more national and international players, who are experimenting with all formats like hypermarkets, supermarkets and convenience stores. Both independent retailers and regional chains are expanding beyond their traditional territories; and widening their range of product offerings to include imported food as well.

All of this is bringing about dramatic changes in shopping and consumption patterns, and exciting customers to try out newer products, especially the 'made in foreign variety' of foods and beverages - a trend that is petering down to tier 2 and 3 cities as well.

India's progressive, upwardly mobile, food and grocery retailers, have realised the opportunity in premium food retailing, where the margins are much higher, and are now working more closely with food importers and consolidators to improve their offering consistency. They are focussing on developing

newer categories, and driving high value consumption among their existing and newer customers.

Not surprising then that all this is buoying the expectancy of food companies from across the world as they attempt an entry into Indian markets. However, it is imperative that international brands must be selective while choosing their Indian partners for the right distribution channel to the most appropriate retail environment. In fact, modern retail is a major catalyst in this growth as it offers the right environment for the imported food category.

On this positive note, I welcome all of you at the Food & Grocery Forum 2012, where you will get an opportunity to view the latest product offerings, meet the industry experts, get insights into the best business practices, and network with manufacturers, suppliers, distributors and your retail partners.



Amitabh Taneja  
Editor-in-Chief

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# Consumption in West India

By Sanjay Bakshi

**T**his last chapter in our series of regional consumption is a combined analysis of western and central states of India. These regions comprise the states such as Maharashtra, Goa, Gujarat, Madhya Pradesh, Chhattisgarh, and union territories (UTs) namely Daman & Diu and Dadra & Nagar Haveli.

The region has its own peculiarity and uniqueness in terms of geographic, demographic, cultural and socio-economic aspects. Goa, located on western coastal line of India, has the highest per capita income at Rs 1,32,719, followed by Maharashtra. Madhya Pradesh is the second largest state of

the region with the lowest per capita income. Chhattisgarh ranks fifth in per capita income, but in the central region it has the highest per capita income of Rs 44,097. The two states of central India occupy 13.5 percent of the country's land area and the western region occupies 15.4 percent.





States / UT	State's share to total SGDP (in %)
Chhattisgarh	1.9
Madhya Pradesh	3.6
Dadra & Nagar Haveli	0.03
Daman & Diu	0.04
Goa	0.4
Gujarat	7.2
Maharashtra	15.4

## Population profile

Five states and two UTs in the region have a combined population of 27.3 crore, with a national share of 22.6 percent, and 65 percent of this regional population resides in rural belts.

The region holds a land area of 9,50,975 sq km with Maharashtra being the most populated state in the region. Two states of Chhattisgarh and Goa have a sex ratio higher than the national average of 940. Other five



Population in West & Central India at glance						
States/UT	Population	Male %	Female %	Density (per sq km)	Area (in sq km)	Sex Ratio (Females per 1,000 males)
Chhattisgarh	25,540,196	50.2	49.8	189	135,133	991
Madhya Pradesh	72,597,565	51.8	48.2	236	307,617	930
Dadra & Nagar Haveli	342,853	56.3	43.7	698	491	775
Daman & Diu	242,911	61.7	38.3	2,169	112	618
Goa	1,457,723	50.8	49.2	394	3,700	968
Gujarat	60,383,628	52.1	47.9	308	196,051	918
Maharashtra	112,372,972	51.9	48.1	365	307,871	925

\*SOURCE: CENSUS 2011

states and UTs have a lower ratio, out of which Daman & Diu with the lowest population number in the region, has the lowest ratio of 618 females per 1,000 males. Overall, the region – individually or combined - has around 52 percent of male population.

## Consumption

The rural average consumption of central India states is 20 percent lower than the national average, whereas the urban average consumption is 16.5 percent lower. The total average consumption is 17.7 percent lower. For states in west India, the rural average consumption is 29.6 percent higher than

Av. MPCE (in INR)	Central India	West India	All-India
Rural	843.20	1,365.84	1,053.64
Urban	1,656.54	2,095.79	1,984.46
Total	2,499.74	3,461.62	3,038.1

SOURCE: NSS 66TH ROUND; IRIS ANALYSIS

the national average, and urban average consumption is higher by just 5.6 percent. For the same region, the total consumption is higher by 13.9 percent. The low consumption averages in central India can be attributed to the state-specific development landscape. The states of Madhya Pradesh and Chhattisgarh have a large portion which comes under tribal inhabitants where development is yet to find its feet on the ground. The development is

Rural Av. MPCE (in INR)	Central India	West India	All-India
Food Items	479.81	760.45	600.36
Non-food Items	363.39	605.39	453.29

SOURCE: NSS 66TH ROUND ; IRIS ANALYSIS

Urban Av. MPCE (in INR)	Central India	West India	All-India
Food Items	706.93	979.75	880.83
Non-food Items	949.61	1,116.04	1,103.63

SOURCE: NSS 66TH ROUND ; IRIS ANALYSIS

further marred by the local issues of Naxal terrorism in the areas where initiatives taken by the government are still awaiting the desired results. This situation has led to a not so impressive employment scenario and have adversely impacted other commercial activities which in turn are unable to push spending up.

Out of total rural average consumption expenditure in the region, 56-57 percent share goes to food and the rest to non-food items. This is almost the same as the all-India share. Individually, central India is down by 20 percent from the all-India average consumption both in food and non-food segments, and west India is higher by 33.6 percent in non-food but 27 percent in food.

More than 50 percent of the average monthly expenditure is on non-food items in the urban segment of both the regions which is very typical of urban consumption trends in other regions of India. As mentioned earlier in this report, a large part of central India is inhabited by tribes which also has its indirect effect on the overall average consumption expenditure in rural areas. Probably this makes the total outcome of rural average consumption expenditure to be low. However, the concern here is that even urban average consumption is also on a lower side. The average monthly expenditure in urban areas - both in food and non-food - is also lower than the all-India average. The downing difference ranges from 14 to 19.7 percent in non-food and food items, respectively. In contrast, west India's urban average consumption on food is higher by

# Morning Stores Going Steady

**Morning Stores, the well-known grocer which kick-started the modern department-store revolution in Delhi, is on a steady growth path. Faced with rising costs, its director Agosh Malik has got aggressive on private labels to increase margins without compromising on quality**

By Sanjay Choudhry

**R**ight in the centre of the trendy Greater Kailash Part-I (GK-I) market of Delhi stands the iconic Morning Stores, one of the most well-known progressive grocers of the national capital. The 4,000 sq ft store spans two floors of a building with a simple, unassuming façade. The tony neighbourhood ensures a steady supply of high-profile, discerning and loyal clients, which Morning Stores has built over the years. There are customers who have been shopping at the outlet for decades! The most famous one of these is the Rashtrapati Bhavan (President's House) which has been a regular customer since 1970. It calls up the store every few days to requisition supplies for state banquets and to meet the day-to-day needs of the presidential household.

Behind the running of Morning Stores is its soft-spoken director, the 38-year-old Agosh Malik, who belongs to the third generation of the Malik family that established the store over 25 years ago. For him, the store is a passion, not a mere business, because of the family heritage, and he is totally focussed on meeting the needs of his customers.

"We mostly cater to the rich and upper middle-class customers because of our location in the middle of South Delhi's premier residential areas. They only want high-end stuff and will never lay their hands on anything else, so we have to be very careful in sourcing products," says Malik, whose store is open seven days a week.

The ground floor houses the food section, and on the first floor are stocked non-food and

household items. A portion of the basement has now begun to be used for wines and liquor. There are plans to convert the rest of the basement into a frozen-food section. "It will have both vegetarian and non-vegetarian items. We are installing special refrigeration devices for this," informs Malik.

The largest-selling items at the Morning Stores include vegetables, food products such as eggs and breads, and other items of day-to-day needs. The food category contributes about 15 to 20 percent of the overall store



 Morning Stores Director Agosh Malik (right) with father Nand Kishore Malik

### Growth Story

- Started as a vegetable shop in 1965 in Delhi's Greater Kailash -1
- Got a boost during the Emergency period (1975 - 1977)
- Modernised in 1982 with self service - the first store in Delhi to do so
- Computerised billing, bar coding, and inventory control introduced in 1994
- Customised software for back-end operations, inventories and fill rates
- From 1500 SKUs has expanded to over 3500 SKUs
- About 500 private-label SKUs (toiletries, grocery such as spices, flour, pulses)
- Around 900 bills (average billing Rs 200-300) processed daily at GK outlet
- Food category contributes 15-20% of overall sales
- Own quality control system (sampling and testing) for private labels
- Three outlets currently: flagship store at GK-1 (4000 sqft), Vasant Kunj (400 sqft) opened 1992, Jasola (900 sqft) opened 2007
- The President's House at Rashtrapati Bhavan remains a regular customer since 1970.



sales. “We try to introduce fresh items every month so that customers keep getting something new every time. We also stock products keeping in mind festivals such as Holi, Lohri and Diwali,” Malik adds.

### The Journey

The journey of Modern Stores has very humble beginnings – as a Plain Jane vegetable shop. Malik’s grandfather Khemchand Malik started the store way back in 1965 to sell vegetables in what was then a deserted market place. “It is hard to believe now, but during that time, the entire GK-I market was unoccupied. There were only three shops: a sweet shop, a meat shop and our vegetable shop. Property developer DLF built the GK market in 1962 and we moved in three years later,” says Malik. His grandfather used to cycle all the way to the Azadpur Mandi – the biggest fruit and vegetables market in Asia – to bring vegetables to the shop every day, while his two sons used to man the store. Business was not very good as there were hardly any houses in the vicinity. To increase revenue, products like cold drinks were gradually added to the Morning Stores’ offerings. After some years, the sons, including Agosh Malik’s father Nand Kishore Malik, took charge of the business.

The main boost to Morning Stores came during the infamous Emergency period (June 1975 to March 1977). “As soon as the curfew ended in the evenings, people would rush out from their homes to stock up on supplies for their kitchens. We were not expecting such huge sales all of a sudden. But despite the short supply of many items, we never sold them above the MRP, even though people were willing to pay more during those hard times,” reminisces Malik. “My grandfather used to man the main cash counter, while my father and uncle would sit beside him selling vegetables. Things were pretty unorganised at the time.”

During those years long gone by, most people in the residential areas around Greater Kailash still used to do their regular grocery shopping at Old Delhi. But as the long distance began to pinch, they began to demand more products from Morning Stores. The Maliks responded by increasing their offerings beyond just vegetables. “Then we seriously thought of turning ourselves into a modern store,” says Malik.

In 1982, Morning Stores became self-service – the first store in Delhi to do so. This was a radical concept at that time which was based on trusting the customer not to shoplift when the store-keeper was not looking. “The

## We have a problem with big national brands in terms of margins. They do not give us good margins

reason for introducing self-service was that we thought we could utilise the store space better and sell more things,” adds Malik.

Almost overnight, the store morphed from a local *kirana* shop into a self-service department store with trolleys and baskets. However, managing the 1,500 SKUs that the Morning Stores stocked during that time posed a problem. There were no POS systems used in the country. The only system available was a Bradma electronic cash register by the Tata Group which could store details of a maximum of 100 SKUs. Morning Stores was among the early pioneers in India to import machines from Singapore which were PC-based and could tackle thousands of SKUs.

“Things were quite difficult then. When we introduced self-service, people were not used to the concept. They thought that the prices at such stores would be quite high. It took some time for them to realise that the prices remained the same at our store – only the shopping concept was different,” says Malik, who joined the store in 1990 inspired by his grandfather.

A few years after taking on the reins of the store, in 1994, he introduced computerised billing, bar coding, inventory control – the whole shebang. “There were no bar codes during the time on any product whatsoever, not even on Proctor & Gamble ones,” muses Malik. “But I wanted to implement the bar-code technology so as to reduce losses by getting control over my inventory. I saw bar coding on one of my trips abroad and immediately introduced it at my store.”

Morning Stores has evolved over the years and today stocks over 3,500 SKUs. Around 900 bills are generated at the GK-I outlet every day with an average size of Rs 200–300. As for their average sales per square feet, Malik says they do not get into such calculations as the sales can be unpredictable. “For example, on January 26 this year, the President’s House had to receive some delegation. Within one day, they bought things worth Rs 175,000, so one never knows what our daily sales would be.” About 35 full-time staffers work at the store, out of which four are in managerial positions. Saturday remains the busiest day of the week, and bulk of the sales takes place in the evenings.

Morning Stores currently has three outlets: the flagship at GK, another in Vasant Kunj (400 sq ft, opened in 1992) and the third at Jasola (900 sq ft; opened in 2007) – all in the national capital. While the first two are on high street, the last one is inside a mall. The store maintains different pricing at the outlets, depending on the customer profile. “We do not maintain the same pricing at all our outlets, but then the quality does not remain the same for stores selling products at a lower price,” reveals Malik.



■ The flagship outlet of Morning Stores at Greater Kailash Part-I

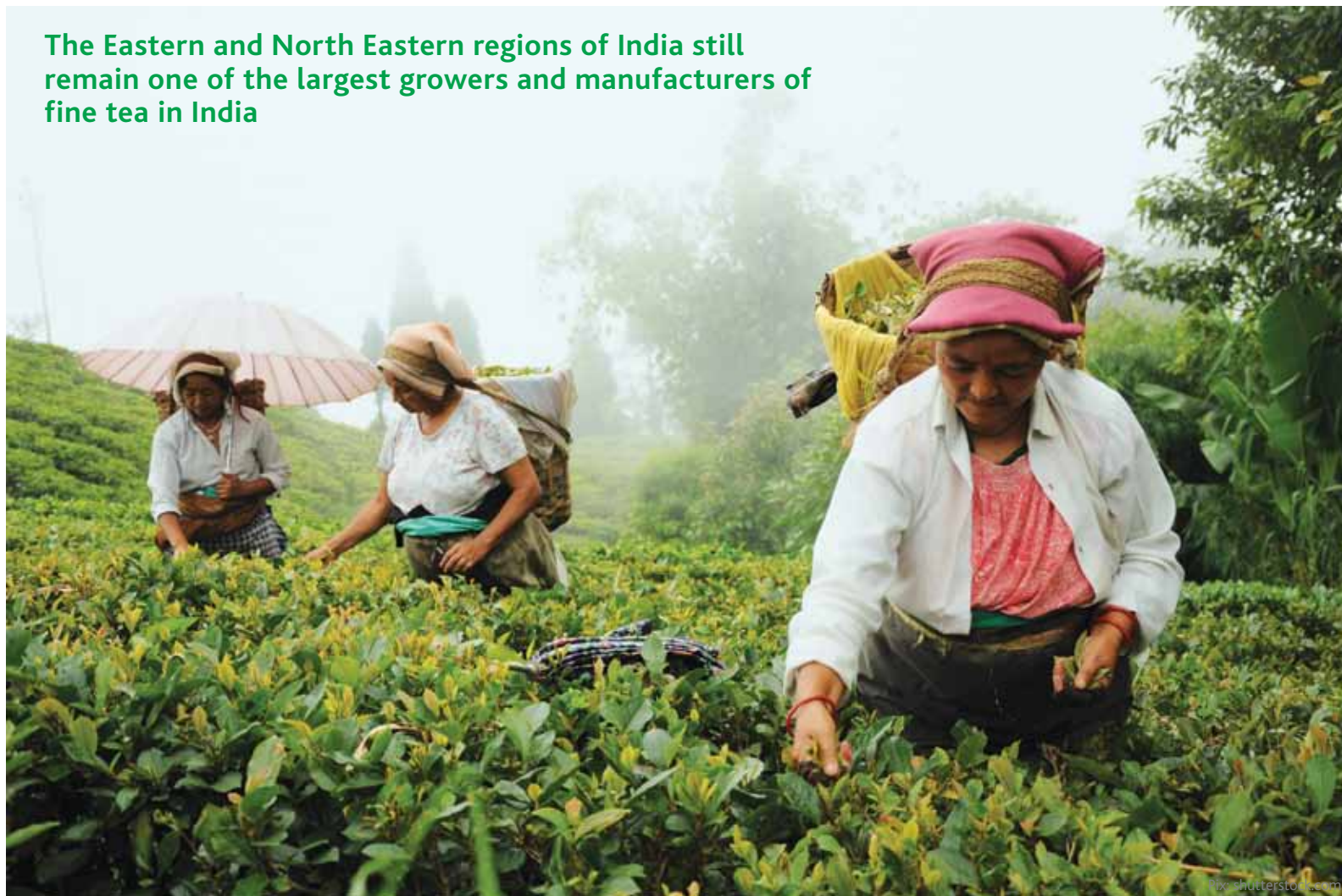
### Private Labels

A major thrust at Morning Stores is private labels, which are being driven by the need to increase margins in a highly competitive environment. Says Malik: “We have a problem with big national brands in terms of margins. They do not give retailers like us good margins compared to what they give to national retail chains. Earlier, the same companies used to give us 17-18 percent margins. Now they do not go beyond 7-8 percent. The retail chains buy from them in huge volumes, so the national brands prefer them to us.” The solution: increase the focus on private labels for better margins. Currently, Morning Stores



# Shaken, Not Stirred

The Eastern and North Eastern regions of India still remain one of the largest growers and manufacturers of fine tea in India



India is one of the largest tea producers in the world, with the tea industry throwing up many global brands in recent years. It has also upgraded to a technologically sound industry. Tea production, certification, exportation, and all other facets of the tea trade in India is controlled by the Tea Board of India, and comes under the control of the Union Government.

Tea always been indigenous to Eastern India, and was cultivated and consumed there for thousands of years. Commercial production of tea in India began only after the arrival of the British East India Company, who converted large tracts of land for mass tea production. The two most popular teas grown in East India are Assam tea and Darjeeling tea, which are popular across the country.

## Distinctive quality of Assam tea

Because of its lengthy growing season and generous rainfall, Assam (lying on either side of the Brahmaputra River, and bordering Bangladesh and Burma), is one of the biggest tea-producing regions in the world. The tea plant is grown in the lowlands of Assam, unlike Darjeeling, which is grown on the highlands. The region experiences high precipitation; during the monsoons, the daytime temperature rises up to 140 °C creating greenhouse-like conditions of extreme humidity and heat. This tropical climate contributes to Assam's unique malty taste, and strong dark colour – features that make this tea famous.

Assam tea, or blends containing it, are often sold as 'breakfast' tea. English Breakfast tea, Irish Breakfast tea, and Scottish Breakfast Tea are

The genesis of the Tea Board dates back to 1903 when the Indian Tea Cess Bill was passed. The Bill provided for levying a cess on tea exports - the proceeds of which were to be used for the promotion of Indian tea, both within and outside India. The present Tea Board, constituted on April 1, 1954, has succeeded the Central Tea Board and the Indian Tea Licencing Committee which functioned respectively under the Central Tea Board Act, 1949 and the Indian Tea Control Act, 1938, which were repealed. The activities of the two previous bodies had been confined largely to regulation of tea cultivation and export of tea as required by the International Tea Agreement then in force, and promotion of tea consumption.

Monthly estimated production of tea in India during 2010												
												(Qty in Th.Kgs)
Districts/States	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Jan to Nov
Assam Valley	3521	35	12678	34910	24223	47199	60012	74300	58939	64668	36120	416605
Cachar	1911	9	2109	3263	4317	3506	6808	4335	3858	7447	5167	42730
Total ASSAM	5432	44	14787	38173	28540	50705	66820	78635	62797	72115	41287	459335
Darjeeling	0	2	530	648	815	1220	980	1034	1372	1216	885	8702
Dooars	2875	696	7877	5921	12605	15856	24331	16685	15849	11999	17671	132365
Terai	323	783	6600	2842	5043	8267	9120	9816	7063	12242	7847	69946
Total W.BENGAL	3198	1481	15007	9411	18463	25343	34431	27535	24284	25457	26403	211013
Others	70	2	35	459	403	748	1560	1655	2627	1670	3133	12362
Total North India	8700	1527	29829	48043	47406	76796	102811	107825	89708	99242	70823	682710
Tamil Nadu	12261	10024	14506	15648	16552	20798	13479	10063	12674	14434	16697	157136
Kerala	5551	5998	4082	4109	8046	5963	6436	4540	5337	6411	5918	62391
Karnataka	578	421	587	441	623	480	468	306	381	650	485	5420
Total South India	18390	16443	19175	20198	25221	27241	20383	14909	18392	21495	23100	224947
ALL INDIA	27090	17970	49004	68241	72627	104037	123194	122734	108100	120737	93923	907657

common generic names for these kind of teas. Though Assam generally denotes the distinctive black teas from Assam, the region produces smaller quantities of green and white teas as well with their own distinctive characteristics.

### Mild aroma of Darjeeling tea

Darjeeling tea is grown in the hilly regions of Darjeeling in West Bengal. It is available as black, white and oolong\* tea. It is a light textured, light-coloured infusion with a sweet floral aroma. It is normally produced from the small-leaved Chinese variety of Camellia plant, unlike the large-leaved Assam plant. Traditionally, Darjeeling tea is consumed as black tea; the oolong and green teas are gaining a lot of attention nowadays.

“The total Darjeeling branded tea market size as per 2010 Nielsen figures is estimated to be 108 tonnes. Goodricke is currently estimated to have a 38 percent market share with the company’s various brands,” informs VS Gulia, Head – Packet Tea Division, Goodricke.

### Tea’s changing status

Tea consumption in India is considered to be more than any other traditional beverage.

*\*Oolong tea is a variety of semi-fermented (oxidised) tea that is known for its sweet and flowery qualities. The oxidation of the leaves during the drying process establishes Oolong’s unique place among tea between Green and Black teas. The Green varieties exhibit a slight withering and browning of the edges of the leaves. Darker Oolongs are fully browned and more robust. Oolong has many metabolic stimulating attributes, and can be used for weight management in addition to a well balanced diet.*

According to Harish Bijoor, Brand-expert & CEO, Harish Bijoor Consults, “Tea is India’s favourite beverage. The per capita consumption of tea is a multiple of 11 to that of coffee. India’s mass beverage choice is tea. All this has happened progressively over the decades but in a painstaking effort by the early companies in this space, who did yeoman’s service to this industry. Brooke Bond and Lipton were two such companies. The heritage of tea plantations run to stringent British norms in the North East regions of the country helped establish an origin status for tea as well. Early work in this space had pioneer marketers go from village to village in the country to popularise the beverage. The edifice of tea consumption was built brick by brick with immense marketing effort. I would call this early tea evangelism.”



Packaged tea is gaining popularity, even in the smaller towns of the region. New technology in production as well as in the packaging helps producers to retain the goodness and freshness of their tea.

According to VS Gulia, “Packaged teas are gaining in preference across the country and East India also has a growing share of packaged tea over loose teas, albeit a little slower, as compared to the northern and western regions. Consistency in quality, convenience, and hygiene are making more and more customers opt for packaged tea over loose even in the lower segment of towns and cities.”

He adds, “We manufacture and source our teas from our own gardens, and all our processing units are state-of-the-art units where special emphasis

is laid on quality control and hygiene. These garden fresh teas are then packed at our own packing units, where again, the best quality materials are used to carefully

pack the teas into sealed caddies or cartons. Our factories are HACCP and ISO certified and as such we adhere to the highest and stringent quality control methods in the world. Further, we keep ourselves abreast of the latest



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