

PROGRESSIVE GROCER

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AHEAD OF WHAT'S NEXT

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MOTHER DAIRY'S OPERATION REVAMP

Can the company
grow into a truly
national player?

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EDITOR'S NOTE

Period of Cautious Optimism

Only two months ago, the Indian modern retail industry was on a rollercoaster ride, with euphoria one day as the government announced FDI in multi-brand retail, and dejection the next when the decision was put on hold due to vicious political opposition. Most Indian retail chains are currently rolling in debt as they went on a expansion spree all over the country on borrowed money, and are hardly turning any profit due to the high interest payments.

Just when you thought it couldn't get any more difficult for the industry came the statement of Aditya Birla Retail MD & CEO Thomas Varghese, who is also the Chairman of the CII-National Committee on Retail, that modern retail in India may see a five percent dip in growth this year from the 20 to 25 percent growth that it witnessed in 2011.

The challenges are immense: lack of funding in the country for expansion, manpower shortages (especially in customer-facing positions), and not enough quality retail real estate. Worse, Varghese said, the much-anticipated consumer shift to modern retail has not happened at a pace the industry was hoping for. Modern retailers have discovered that the USP of kiranas – free credit, free home delivery, proximity to residential areas and personal rapport with customers – is something that is going to be tough to beat. The result: the year 2012-13 does not look great either – the industry is slipping into a mood of cautious optimism.

An instant boost can be provided by the government to the industry, especially to the supermarket and hypermarket chains, by allowing FDI in multi-brand retail, and opening the tap of FII investment and PE funding into the sector. Will it happen this year? Maybe in the next couple of months after the elections in the five states are over? Hope still floats.

Talking about expansion and growth, one home-grown player that has major plans to flex its muscles is Mother Dairy, the name synonymous with milk and dairy products in the Delhi / NCR region. But we have always wondered: why a company which sells around 60 lakhs liters of milk every day has been content to remain a regional player for 38 long years? We spoke to top Mother Dairy officials and discovered the massive expansion plans which the company has chalked out to become a truly national player. But will it succeed, considering its milk procurement constraints, and competitors like Amul snapping at its heels? Read our cover story to find out.

To keep abreast of what the food and grocery industry and the HoReCa businesses are planning as a whole, make a beeline for our two big events: the Food & Grocery Forum India, and the India Food Service Forum that are scheduled for March 27-28 in Mumbai.

See you there!


Amitabh Taneja
Editor-in-Chief

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North India Consumption

By Sanjay Bakshi

North India comprises of the states of Jammu and Kashmir, Himachal Pradesh, Punjab, Rajasthan, Haryana, Uttar Pradesh and Uttarakhand and union territories (UTs) of Delhi and Chandigarh. Although the region of North India is predominantly agrarian, it has been growing fast with rapid economic growth. The region has prospered as a consequence of the Green Revolution, and experienced both economic and social development. The highest per capita income states in North India include Haryana, Himachal Pradesh, Punjab and Uttarakhand, and the UTs of Delhi and Chandigarh. Reflecting the prosperity of North India, Punjab and Haryana rank third and fourth (after Goa), respectively among the states in per capita income. The region occupies 27 percent of India's land area.

| States | State's share to total SGDP (in %) |
|------------------|------------------------------------|
| Haryana | 3.9 |
| Himachal Pradesh | 0.8 |
| Jammu & Kashmir | 0.7 |
| Punjab | 3.3 |
| Rajasthan | 4.6 |
| Uttar Pradesh | 8.8 |
| Uttarakhand | 1.2 |



Population profile

Seven states and two UTs of the region have a combined population of 36.86 crore, with a national share of 30.4 percent. Out of this population, 73.6 percent resides in rural India and the rest in the urban cities.

| Population in North India at a glance | | | | | | |
|---------------------------------------|-------------------------------|--------|----------|---------------------|-----------------|------------------------------------|
| States/UTs | Population as per Census 2011 | Male % | Female % | Density (per sq km) | Area (in sq km) | Sex Ratio (Females per 1000 males) |
| Chandigarh | 1,054,686 | 55.0 | 45 | 9252 | 114 | 818 |
| Haryana | 25,353,081 | 53.2 | 46.8 | 573 | 44,246 | 877 |
| Himachal Pradesh | 6,856,509 | 50.6 | 49.4 | 123 | 55,744 | 974 |
| Jammu & Kashmir | 12,548,926 | 53.1 | 46.9 | 124 | 101,201 | 883 |
| Delhi | 16,753,235 | 53.5 | 46.5 | 11297 | 1,483 | 866 |
| Punjab | 27,704,236 | 52.8 | 47.2 | 550 | 50,371 | 893 |
| Rajasthan | 68,621,012 | 51.9 | 48.1 | 201 | 341,398 | 926 |
| Uttar Pradesh | 199,581,477 | 52.4 | 47.6 | 828 | 241,040 | 908 |
| Uttarakhand | 10,116,752 | 50.9 | 49.1 | 189 | 53,528 | 963 |

*SOURCE: CENSUS 2011



The most populated state in India, Uttar Pradesh, stands fifth in terms of land area (889,126 sq.km.). The state has the lowest per capita income in the region, and Haryana has the highest per capita income at Rs 92,327. Delhi has the highest population density with more than 11,000 persons per square meter, followed by Chandigarh. Mountain states Himachal Pradesh, Jammu & Kashmir and Uttarakhand have a population density of less than 200 persons per sq.km. However, five out of the seven states, and both the UTs have a sex ratio which is below the national average of 940. The male population is 52.4 percent in the region with both UTs leading with the highest share individually.

Consumption - Food & Non-Food

| Av. MPCE (in INR) | North India | All India |
|-------------------|-----------------|----------------|
| Rural | 1,573.32 | 1,053.64 |
| Urban | 2,256 | 1,984.46 |
| Total | 3,829.32 | 3,038.1 |

SOURCE: NSS 66TH ROUND; IRIS ANALYSIS

The average rural consumption of the region is 49.3 percent higher than the national average, whereas the urban consumption is just 13.7

percent over the all-India average. The total average of the region is higher by 26 percent for the same comparison.

| Rural Av. MPCE (in INR) | North India | All India |
|-------------------------|-------------|-----------|
| Food Items | 794.52 | 600.36 |
| Non-food Items | 778.8 | 453.29 |

SOURCE: NSS 66TH ROUND; IRIS ANALYSIS

The rural consumption spend is around 50 percent on food, and the rest 50 percent is on non-food items. In comparison, the all-India rural consumption is 57 percent on food items and 43 percent on non-food items. The average food consumption in rural population is higher by 32.3 percent, and in non-food items it is a whopping 71.8 percent higher than the all-India average.

| Urban Av. MPCE (in INR) | North India | All India |
|-------------------------|-------------|-----------|
| Food Items | 977.64 | 880.83 |
| Non-food Items | 1278.37 | 1103.63 |

SOURCE: NSS 66TH ROUND; IRIS ANALYSIS

Unlike rural, urban consumption does not have very high variations from the all-India averages, yet the difference is in double

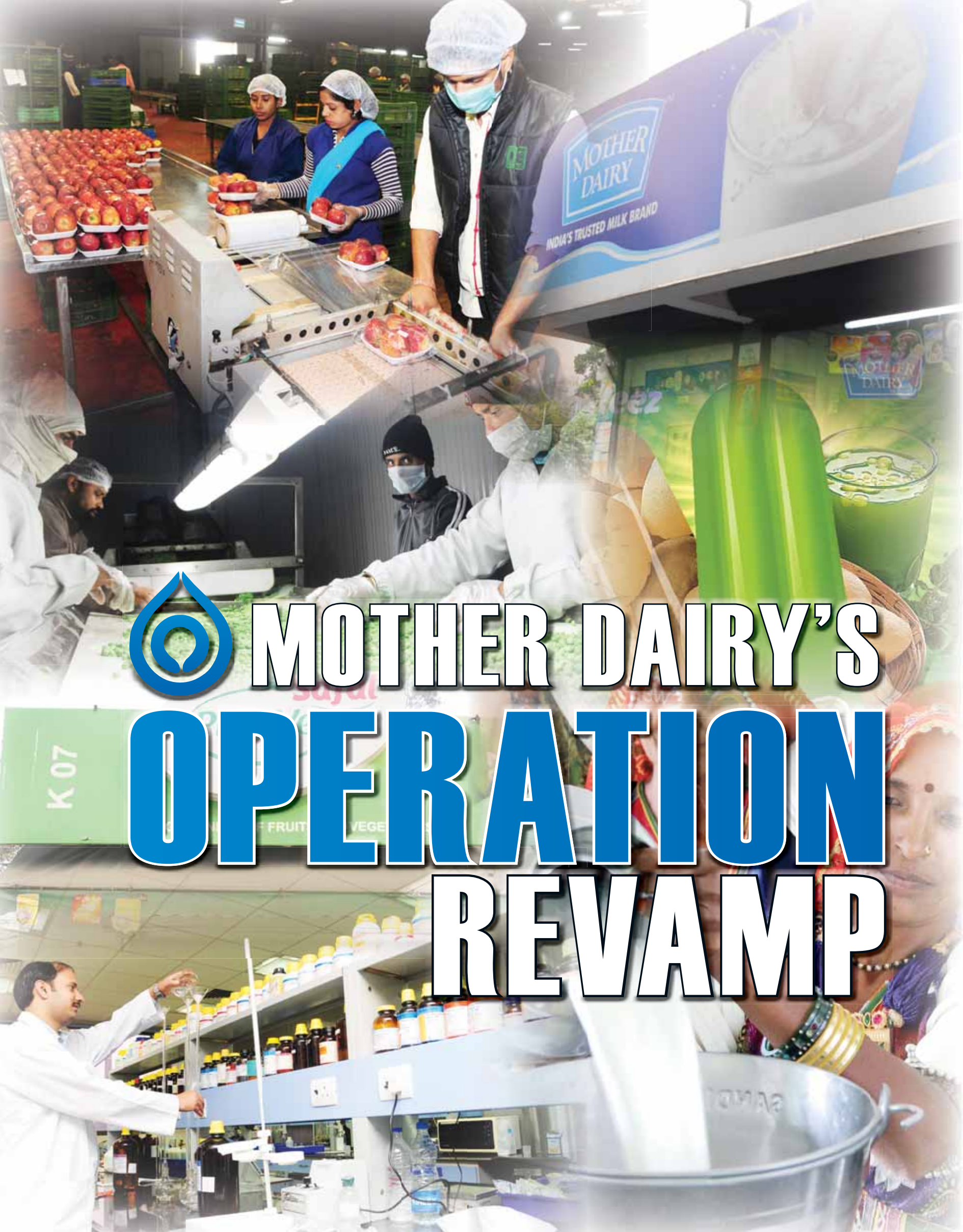
digit for food and non-food items. But their individual share in total consumption split is 43.3 and 56.7 percent, respectively, which is more or less identical with the all-India average. Since the urban population is witnessing an improvement in living standards due to higher incomes, there is a natural inclination towards more spending on non-food items such as entertainment, recreation, services, fuel, etc. On the other hand, the rural areas still have primary consumption of food items.

| States/UT | Consumption share in North India (%) |
|----------------------------|--------------------------------------|
| Jammu & Kashmir | 3.74 |
| Himachal Pradesh | 2.33 |
| Punjab | 10.31 |
| Chandigarh | 0.80 |
| Haryana | 9.12 |
| Uttarakhand | 3.64 |
| Uttar Pradesh | 42.76 |
| Delhi | 9.03 |
| Rajasthan | 18.28 |
| North India | 100.00 |

IRIS ANALYSIS



MOTHER DAIRY'S OPERATION REVAMP



For over 35 years, Mother Dairy has been a household name in the Delhi/NCR region for milk. But as the competition increases in the space, the company has chalked up an aggressive growth plan to launch new products, move up the value chain and become a truly national player

By Annie Johnny

Milk and milk products major Mother Dairy – a wholly owned subsidiary of the National Dairy Development Board (NDDB) of India – was enjoying an unchallenged stronghold in Delhi/NCR region for over 35 years when rival Amul, owned by Gujarat Co-operative Milk Marketing Federation Ltd. (GCMMF), began flexing its muscles in the area with aggressive marketing, trying to wean away customers.

Recalls S. Nagarajan, Managing Director, Mother Dairy, “With Amul’s rising presence in the region, we began losing market share in the full-cream milk segment. Our sales kept declining for two years, though it was not a slump as the impact was limited to that particular category.” The sudden competition and setback galvanized a complacent Mother Dairy, forcing it to sit up and take a fresh look at its businesses. The result, The company decided to go for a complete revamp to better take on the competition and improve its offerings and the value-for-money proposition.

Mother Dairy began to re-strategize its marketing plans and overhauled the management structure. The outcome was there for all to see: new product launches such as yogurt and ice-creams, an upgrade of its fruits and vegetables business called Safal, new edible oil variants under the Dhara brand, refurbishment and upgrade of Mother Dairy

outlets and booths, and enhancement of front-end and back-end operational efficiencies.

The company took a hard, fresh look at its product portfolio and decided to focus on value additions. Says Nagarajan, “We began looking at value-added products more closely and observing where the real value-adds were coming from, besides our core milk and dairy products.” Mother Dairy came to the conclusion that it can further leverage its brand value through edible oils, ice-creams and, to some extent, fruits and vegetables, including frozen peas and corn. Since it was already doing a lot of fruit processing, it began offering fruit juices under the Safal brand apart from banana pulp as well as mango purees and pastes to several manufacturing companies. “We are now confident that processed fruits and vegetables, dairy products, and edible oils are the three segments which are going to grow at an exceptionally fast rate, even double that of milk. We will focus more strongly on these. We are back with a growing business and on the right track,” asserts Nagarajan.

The market in recent times has seen a slew of new products from Mother Dairy. These include fruit *lassis*, fruit yoghurts, jams, *kulffis*, and cooking oil variants such as sunflower, soya, and mustard oil. The company intends introducing its offerings in different geographies. Says Nagarajan, “When you

increase your value-added products, you need to be present where the consumer is. In fact, we are moving from city to city, category by category. Our business involves a high supply chain so we cannot expand to different cities at the same time but have take a city-by-city approach.”

Mother Dairy is upgrading its presence and enhancing its visibility in key outlets. “We feel modern retail is a very important and

India Dairy Facts

- Demand for milk is likely to reach 150 million tonnes by 2016-17 (end year of 12th Five Year Plan) and between 200 and 210 million tonnes by 2021-2022.
- India continued to be the largest milk producing nation in 2010-11 with milk production of 116.2 million tonnes, an increase of 3.3 percent over the previous year.
- Dairy cooperatives collected 9.6 million tonnes of milk, an increase of around one percent compared to 2009-10. Milk marketing by the cooperatives stood at 8.2 million tonnes, an increase of around four percent compared to the previous year

Source: NDDB Annual Report 2010-2011



S. Nagarajan
Managing Director
Mother Dairy



Pradipta Kumar Sahoo
Business Head (Horticulture)
Mother Dairy



Munish Soni
DGM, Marketing Products Division
Mother Dairy



Debashis Das
General Manager - Marketing
Mother Dairy



Dinesh Agrawal
COO, Dhara SBU
Mother Dairy

Oil's Well

Jivo Wellness is the brain child of **RPS Kohli**, Managing Director of the brand, who introduced canola edible oil to the Indian market. He discusses the ideation and philanthropy behind the business model of Jivo, and the health benefits of the revolutionary oil, with **Juhi Sharma**

How was Jivo Wellness conceptualized ?

Post 2005, I decided to take a sabbatical as director of apparel firm, Koutons, because I wanted to do something for a cause that was meaningful, and which would benefit mankind at large. Following this train of thought, I subsequently resigned from my official responsibilities, and a little later, joined an NGO called the Kalgidhar Society - a humanitarian charity organization that primarily builds educational institutions for the poor in underprivileged areas of north India. We were given a short-term target of increasing the number of schools to 150. This required huge donations for the purpose of investments. At that point of time, and more so during the economic downturn, we realized that donations alone would not suffice for the long term. We then took a decision to start a business, which would be a social initiative as well as economically viable, so that the revenue generated from it could be invested in building schools. Today, the society runs 111 schools, 2 private universities, 24 colleges, and a 280-bed charitable hospital.

The next logical step was to think of a product, which would just not be a revenue-generating item, but would provide some benefit to the end-consumer. Incidentally, our



**Health &
Wellness**

A collage of various healthy food items arranged on a wooden surface. In the center is a large glass bowl filled with rolled oats. To the left is a smaller glass bowl containing almonds. In the foreground, there are several cookies and a small bundle of wheat stalks. To the right, a glass is filled with white milk. In the background, a whole red apple is visible, along with a small bowl of jam and a stack of bread slices. The text "Health Taste Convenience" is overlaid in the lower right quadrant.

**Health
Taste
Convenience**

More and more health boosting products are lining retail shelves as concerns regarding health and well-being are beginning to influence consumers' purchase decisions

By Priti Mohile

Increasing health awareness has led to a noticeable shift in the attitude of people towards healthier food alternatives. Consumers are becoming more proactive in finding ways for ensuring better health and overall well being, with the result that the Indian market is witnessing a growing demand for fortified premium foods.

It is hardly surprising then that both Indian and international manufactures of health-based food products are finding a ready market for their products given the growing consciousness and demand. In fact, these companies are targetting the increasingly prosperous middle class consumers who are recording the highest consumption of calcium supplements, foods for cholesterol control, diabetes, heart care, etc.

These consumers are now better informed about the inadequacy of a “normal” diet, nutrient losses during food processing and cooking, and of what constitutes an “unhealthy diet”. They are checking out functional foods, and fortified or enriched foods on retailer shelves that will prevent the onset of any deficiency or illness. This concern is also being driven by the escalating cost of medical care, given the surge in chronic diseases such as

hypertension, diabetes, obesity, coronary heart disease, etc, due to changing lifestyles and eating habits. They are also seriously reading the labeling on food packs for information on the ingredients, nutrients, and their health benefits.

Preventive Healthcare

Retailers 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 food supplements over medicines. Dabur, Cadbury, Britannia, and some pharmaceutical companies have diversified into production of health foods, nutraceuticals, and dietary supplements. They have also raised awareness of the benefits of such products in helping reduce the risk or onset of chronic diseases. Conventional, healthy grains are now being processed to make healthier variants, and even taking into account consumer's ease and convenience. For instance, “Britannia Healthy Start” range of ready-to-cook breakfast



mixes of upmas, pahas, porridges and oats contain multiple-grains, pulses, nuts, all in single packs. A “Homemade” section includes ready-to-cook breakfast cereals made from ragi, dalia rice flakes and semolina made by local small-scale industries.

Wholesome Breakfast

To meet the needs of different age groups, Kellogg's, one of the largest players in the Indian breakfast cereal market, has launched chocolate coated wheat scoops “Chocos” and sugar coated “Frosties.” For adults there are wheat flakes, rice flakes, rice crispies, etc. “Kellogg's special K” also promises weight management. Kellogg's All Bran, a 100 percent whole wheat ready-to-eat cereal has high amount of fiber, which helps in the

| Ingredient | Fortified Foods | Benefits |
|----------------|---|---|
| Omega 3 | Supplements and malted beverages | Anti-inflammatory and supports brain development |
| Probiotics | Yogurt, icecream | Improves intestinal microflora, improves digestive health and enhances immunity |
| Beta glucan | Oat enriched foods | Soluble fiber, aids in lowering cholesterol |
| Phytoestrogens | Soya based foods, milk and other drinks | Antioxidant properties, lowers LDL oxidation. |
| Tocopherols | Fortified oils | Antioxidant properties, limits oxidation of LDL |
| Ginseng | Tonics and supplements | Claimed to have anti-aging properties |
| Beta-carotene | Supplements and beverages | Antioxidant, supports eye health |



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150 ml

Regular Soy Sauce
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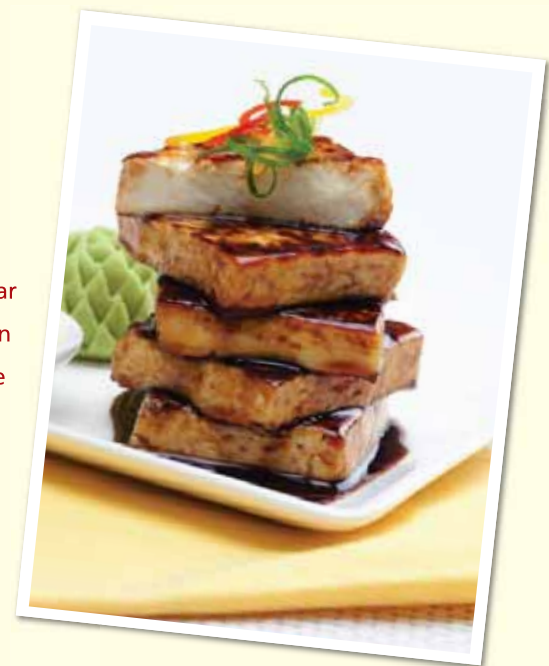


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Soy Sauce
150 ml

*Soy sauce
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150 ml

*Teriyaki
Roasted Garlic*
250 ml

*Teriyaki
Original*
250 ml

*Teriyaki
Thick*
250 ml

*Teriyaki
Honey & Soy*
250 ml

*Teriyaki
Spicy*
250 ml

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Soy Sauce*
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