PROGRESSIVE GROCER

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In Times of Inflation

Grocers discuss ways to combat rising costs

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Easing inflationary pressure

Currently, inflation appears to be a global phenomenon. Consumers, reeling under rising costs, are becoming cautious while shopping, and are paring down their expenditure on food and grocery to the minimum. Eating out or buying premium products is seen as indulgence.

As consumers tighten their purse strings and gain control over their household budgets, grocers have become a worried lot. After all, they have to contend with rise in costs in three core areas: rentals, electricity and labour. But many claim that they are squeezing their own profit margins to protect the consumers from rising costs. The more gritty ones are finding new avenues to ensure their bottomlines, by making optimum use of their store space. They are adding a gourmet section, a shop-in-shop, or even a small cafe. Maganlal of Magsons in Goa is one such enterprising grocer who has rented out part of one of his stores to a day-night medical shop, which, along with the revenue, is generating an enormous of CSR benefit in the catchment.

Bigger retailers are consolidating their business, cutting costs by shutting down non-performing stores, sub-leasing retail space in their outlets, and making their workforce leaner. Manufacturers, who are having to bear the cost of high raw material and operational costs, are resorting to low pricing strategy, smaller packaging, etc, to keep prices at bay. Many have upped their in-store promotional activities, and are introducing more economy packs. Value packs and private labels are being made more attractive and being given more shelf space.

Our cover story on the topic discusses how grocers are dealing with the situation.

Amitabh Taneja
Editor-in-Chief

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Multiple Channels

The advent of the multi-channel retailing era has led to increasingly complex interactions with customers. For retailers, the solution lies in taking recourse to intelligent supply chain technologies

By **Ushasri T S**

A plethora of retailing options today

Not too long ago, retail meant brick and mortar stores. In a matter of a decade, retail has come to mean multiple sales channels and formats that include not just stores, but also e-commerce, m-commerce (mobile), f-commerce (Facebook), s-commerce (social) and v-commerce (video-enabled).

Online buying has really started to take off in India, as evidenced by a study conducted by Google India and TNS. Online shopping in India saw a 128 percent growth in the period 2011-12 as compared to only 40 percent growth in the previous year. Additionally, widespread smartphone ownership is ensuring that m-commerce is accelerating faster.

The growth in online spending can also be attributed to several factors – a growing number of retailers beginning to build an online presence, along with major international retailers marketing directly to consumers locally in India, or enabling shipping to India.

As per data released by FICCI, the Indian retail sector will become a USD 1.3 trillion opportunity by 2020. Real estate costs are escalating and retailers have no option but to evaluate multi-channels to reach customers.

The advent of the multi-channel retailing era has led to increasingly complex interactions with customers. Now savvy shoppers do not have to restrict their shopping to just brick and mortar stores, but can browse online, check prices using a mobile device and place a 'click-and-collect' order or give customer feedback via Facebook. Multi-channel retailers now need to get used to consumers doing their research online before appearing in the store to make the actual purchases or vice versa. In many cases, a sale may span several channels before it closes. This places tremendous pressure on the retailer to support integrated, cross-channel selling. The value proposition for multi-channel sales is to capture the sale that would not occur otherwise because a customer no longer relies exclusively on shopping at a brick and mortar store.

In perhaps a more global context, as retailers move to multi-channel selling and grow to a broader geographic customer base, the natural tendency is to increase inventory levels close to the point of demand. Retailers often gravitate to opening regional distribution centres to minimise stock-outs and satisfy their geographically dispersed customers. They add new layers of software and inventory systems to deal with each new retail channel and track each channel through separate divisions and warehouse systems.

Controlling inventory, being ready to ship on-time and handling a diverse customer base are all far more difficult when using discrete systems for different retail channels. Depending on how resources have been allocated within the company, this can create unanticipated supply chain bottlenecks, resulting in late shipments and customer complaints or supply chain blind-spots where poor inventory visibility results in missed sales opportunities.

Empty shelves - a lost opportunity

The cardinal sin of retailing for today's technology-savvy consumer is to have an empty shelf. Most retailers are well aware of the perils of a stock-out and the impact persistent failures in making merchandise available to the customer can have on the bottom line. However, in retail environments that are becoming increasingly complex and multi-faceted, the issues associated with ensuring a full shelf go far beyond simple inventory visibility.

Just as customers have no patience for order delays or non-availability, shareholders have no patience for reduced inventory turns, increased inventory investment, and higher working capital costs. Because of these dynamics, the traditional, static way of fulfilling a customer's order out of the warehouse located closest (geographically) is becoming outdated, and traditional inventory systems, which are not up to the task of effectively and

In retail environments that are becoming increasingly complex and multi-faceted, the issues associated with ensuring a full shelf go far beyond simple inventory visibility

accurately supplying products through the mixed modes of modern retailing, are putting companies at a competitive disadvantage.

Today's retailers - as well as distributors and manufacturers - need to adapt to the new multi-channel retailing era or face being marginalised or bankrupt. To adapt, they need to harness the power of inventory across their enterprise and involve suppliers and logistics partners in direct customer order fulfillment. They must strive to reduce costs across the supply chain without sacrificing order quality and on-time delivery.

Warehouse and Distributed Order Management technology to the rescue

To deal with the nuances thrown up by multi-channel formats, retailers require a solution that sits outside traditional supply chain systems, one that aggregates data and integrates with the full distribution network - including all the warehouses, stores, in-transit inventory and vendors - to provide a consolidated and centralised view of inventory across the network. This will allow a retailer to respond in a split second to a purchase request. It becomes even more critical for food retailers in India, where the food sector is predicted to grow to a size of 400 billion USD by 2025. Clearly, market conditions provide multiple opportunities, especially in supply chain and logistics where there is a clear need for modernisation.

Papa John's, one of the leading pizza companies in the world, wanted to maintain efficient, cost-effective operations throughout its supply chain. Though it was growing exponentially, Kentucky (US)-based Papa John's International was still hampered by supply chain inventory, visibility and accuracy challenges that were impacting its businesses. The company's growth out-paced the supply chain's ability to maintain inventory and supply restaurants efficiently and cost-effectively. With intelligent supply chain solutions, the company was able to enjoy the benefits of improved overall inventory visibility, reduced outside storage costs and inventory levels, improved DC efficiencies and transportation utilisation, reduced mileage and labour costs.

Today, software solutions have matured significantly and have been deployed to help companies weave the varied strands of their distribution systems into a cohesive, effective network. The promise is rapidly becoming a reality as retailers, solution vendors, and the marketplace gain experience in deploying these solutions. For example, Warehouse and Distributed Order Management solutions allow managers to combine existing inventory systems and coordinate multiple retail channels by sourcing products from warehouses throughout the world. Effective solutions provide system-wide inventory visibility, sourcing, allocation and delivery scheduling at each stage of the fulfillment process in real time. Using configurable rules, Distributed Order Management solutions can aggregate orders as they are placed, evaluate global inventory, and then match demand to the supply. An effective solution can provide precise understanding of product demand and backlog for all markets, and not just single channels.

Distributed Order Management solutions build on traditional inventory systems such as Warehouse Management solutions that determine the fastest and most efficient ways of shipping a particular order whether they be 'singles' for web, mobile and call centre orders, or bulk consignments for store orders.

Whilst Warehouse Management solutions enable companies to fulfil orders from a specific facility, Distributed Order Management allows companies to connect their Warehouse Management solution, which manages the supply side of the equation, to equally sophisticated instruments such as planning and replenishment solutions on the demand side. This allows companies to manage the diverse ways customers now have for ordering, while orchestrating higher service levels.

Distributed Order Management solutions take into account the fact that different channels demand different levels of service. Some channels need products faster, while others are less time-sensitive. Failure to meet a "just in time" commitment has different consequences depending on how close it is to the final customer transaction.

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Online shopping in India saw a 128% growth during 2011-12 as compared to only 40% growth in the previous year

Pix: David Jones / Shutterstock.com

The cardinal sin of retailing for today's technology-savvy consumer is to have an empty shelf

Cover Story

In Times of Inflation

Pix: shutterstock.com

As operational costs rise, food prices skyrocket, and shoppers tighten their purse strings, grocers are squeezing their own profit margins to protect consumers from rising food and grocery prices

By **Annie Johnny**

The retail sector across the world has been affected by rising prices and inflation. According to Technopak Advisors, in India, the current inflation rates stand at an overall 7 percent, which in the past five years has been higher than any period since the 1970s. "Food inflation in India has been high for more than a year due to strong demand and choked supplies. Blame it on the uncontrollable/unseasonal rains last year or a badly managed distribution system. But the pace has slowed significantly, as the government continues to take baby steps to improve supplies and arrival of fresh farm produce," says Reetesh Shukla, Associate Director, Food Services and Agriculture, Technopak.

He adds, "Analysing annual price hike of other specific food articles interprets that vegetables are at the apex with 21.29 percent followed by cereals and products with 17.04, followed by egg, meat and fish with 15.72 percent inflated. Oils and fat prices went up by 14.56 percent on an annual basis, and pulses, milk and milk products became expensive by 12.39 and 8.06 percent, respectively."

Rising prices are affecting both retailers and manufacturers alike. According to Manoj Satia, Managing Director, Manoj Multifoods and MMF Direct2U Retail, the rise in food and grocery prices can also be attributed to the rising freight charges. "The primary and local freight costs are going very high. This is of course because of the diesel and petrol prices. Also, in places Maharashtra, Local Body Taxes (LBT) is being implemented which will definitely increase the costs further," he says.

Raw material costs have increased, which have raised prices throughout the supply chain. "The hike in the prices of raw material raises the input cost, thereby increasing the cost of production leading to the entire escalation in the total product cost. This escalation results in manufacturers, who not being able to absorb the entire cost escalation, resort to price increase," says Shukla.

Many supermarkets are squeezing their own profit margins as tightly as possible in order to protect their consumers from rising costs. Many have upped their in-store promotional activities and are adjusting their ranges and introducing more economy range variants. For instance, value packs and private labels are being made more attractive and are being given more shelf space. Retailers are realising that customers are no longer driven by loyalty but by the best bargain a retailer can offer them.

Measures by manufacturers

The Indian market has been witnessing a slew of promotional activities and discounts across food and grocery products including soaps, shampoos, household cleaners, biscuits, etc. Offers range from 'extras' to price-offs as

Indian food inflation remains stubbornly elevated, albeit with minor variations week on week which mean little or nothing to the vast majority of end consumers

– Reetesh Shukla, Associate Director, Food Services and Agriculture, Technopak

manufactures look for volume growth. Many are resorting to reducing their pack sizes or contemplating giving up popular and low price points of Rs 5 and 20. For example, PepsiCo and Coca-Cola have increased their prices and Coca-Cola is even looking at non-standard pack sizes. Companies like Parle have also increased the prices of their biscuits from Rs 5 to Rs 6 and from Rs 20 to Rs 22 and candies from Rs 25 paise and Rs 50 paise to Rs 1.

"The other aspect of increasing food prices is lower profitability for the manufacturer and value chain agents as the entire burden of the input cost cannot be passed on to the consumers. Squeeze in profits is forcing manufacturers to cut down on other costs such as R&D, advertisement and promotion as well as the manpower cost to maintain the bottomline performance of their company. However, these are the short-term measures to hold shareholders confidence as well as market price of the stock at desired levels. Additionally, the rising input cost is impacting exporters of food and grocery products where hedging against the fluctuating exchange rate with Indian rupees getting weaker on productivity scale is getting difficult," says Shukla.

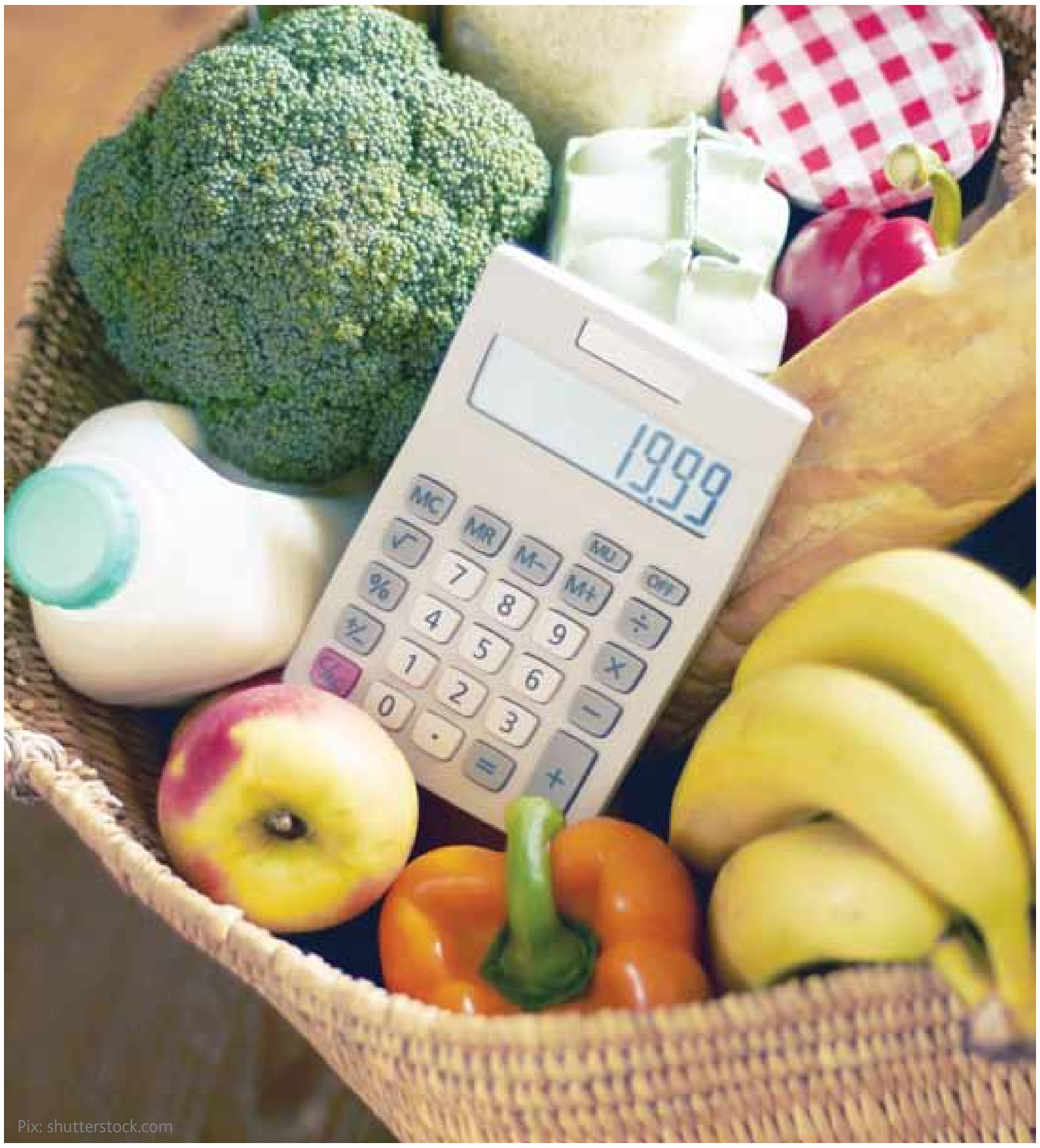
Change in consumer behaviour

Although food categories like gourmet, breakfast cereals, and frozen ready-to-cook are growing due to rising disposable incomes, at the same time, increasing costs of these items are making consumers opt for bulk packs (economy packs) and for lower priced variants to reduce their household expenditure on grocery.

"The increase in prices is either reducing demand or inducing a shift of preference from premium to value-driven variants or substitution. However, in the Indian market, it is partly balanced with growth drivers like a growing consumer base, increasing double household income, increasing disposable income, etc, that is pushing demand," says Shukla.

"The double digit growth in food prices has concerned all the stakeholders of the value chain starting from the primary producer to the final consumer, and as usual, also the policy makers. Indian food inflation remains stubbornly elevated, albeit with minor variations week on week which mean little or nothing to the vast majority of end consumers," he adds.

Basmati rice producers, exporters and rice millers, KRBL which sells rice under its brands India Gate, Lotus and Nur Jahan, are witnessing greater demand for lower-priced ranges. "This last quarter, the basmati rice market has been highly volatile and very unpredictable as well. Since rice is a staple food product, and basmati a premium rice category, it is not affected by rising prices. However, what is interesting to see is that consumers are switching to lower variants of rice in our brands. For example, consumers of India Gate Dubar (earlier Rs 55 now Rs 65) in Karnataka have switched to India Gate Feast Rozzana (earlier Rs 45 now Rs 55). In fact, we have seen a considerable decline in our premium range," says Ayush Gupta, Executive Director- Marketing at KRBL.



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Spring Forward

Supermarkets embrace the season's spate of fresh produce with novel merchandising ideas bound to boost sales

By **Jennifer Strailey**

The new year has brought good news galore about America's growing appetite for fresh produce. Now, with spring around the corner, grocers from coast to coast are preparing to deliver the season's bounty with better-than-ever merchandising, in-store education and social media outreach.

"Fresh and seasonal is here to stay," say market researchers at The Hartman Group, whose newly released *Ideas in Food 2013* offers a cultural take on what we'll be eating this year. While we'll always be a nation of meat eaters, assures the Bellevue, Washington -based company, consumers are "letting plant-based products take center stage" on their plates.

Produce has not only begun to play a more significant role at mealtime, it's also fueling the nation's insatiable snack habit. The NPD Group's recent *Snacking in America* report finds that fresh fruit is more than just the top snack food consumed in America, it's also one of the fastest-growing, outpacing both chocolate and potato chips as the most popular snack.

In addition to its healthy appeal, fresh fruit has earned its place as America's favorite snack food due to its popularity among all age groups, notes Port Washington, New York-based NPD. Retailers and suppliers of produce can expand upon this trend, says NPD Food and Beverage Industry Analyst Darren Seifer, "with packaging innovation and promotions for on-the-go activities when [fruit is] least likely to be consumed."

This spring, purveyors of produce are taking advantage of the heightened interest in fruits and vegetables with dynamic displays and plenty of local flavour. With product emphasis varying from region to region, *Progressive Grocer* spoke with produce gurus from three different parts of the country to get the pulse on fresh food retailing in America.

Cherry sprout market

As its name would suggest, produce is Portland, Oregon -based Cherry Sprout Market's stock in trade. About half of the 2,000-square-foot store is devoted to fresh produce. "We're moving towards becoming a one-stop shop for the neighborhood, but we're still mostly produce," says co-owner Katie Sharrow Nichols, who spearheads produce buying for the store.

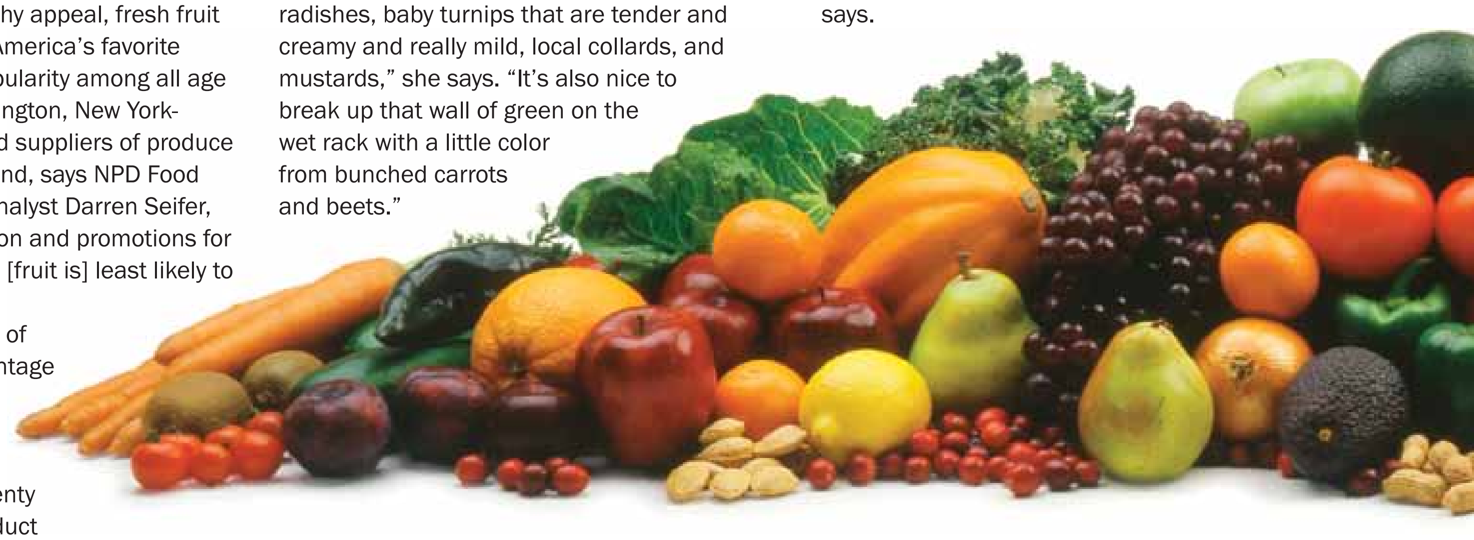
The market prides itself on the freshness and quality of its produce, especially its seasonal selection. "But because you can't please the contemporary customer without having things like grapes year-round, we do source certain products from far away," explains Nichols.

Local produce is Nichols' passion, so spring has her rhapsodic for radishes, greens and artichokes. "It's always such a joy and relief to see the return of local spring produce like radishes, baby turnips that are tender and creamy and really mild, local collards, and mustards," she says. "It's also nice to break up that wall of green on the wet rack with a little color from bunched carrots and beets."

Cherry Sprout sources collard and mustard greens locally eight months of the year, but carries them year-round. One of the only places in town that offers turnip greens, flat mustards, collards and curly greens, the market "has a legacy of soul food," says Nichols, and she is determined it remain a destination for those items.

When it comes to spring produce displays, Cherry Sprout considers more than vibrant color. "We also like to use the geometry of the fruit or vegetable," notes Nichols. "With artichokes, for example, we'll arrange them so they are all pointing in the same direction. I think they look really pretty when they're tilted a little to the side, so you can see that nice thistle shape."

Displays that give the impression of abundance without over-stacking highly perishable product are equally important. One of Nichols' favorite tricks is to take a large basket and then place either a shelf liner or other, smaller basket upside down within that basket and arrange artichokes within. "The basket looks like it's bursting with artichokes, but it's really only a single layer deep," she says.



Protection From the Sun

Sun care products have been gaining ground as they are reaching a wider segment of consumers; however, for the segment to grow, sustained promotions and consumer awareness programmes need to be initiated by the brands

By **Juhi Sharma**

With the onset of summer, the strategic focus of sunscreen marketers, manufacturers and retailers automatically shifts towards enhancing visibility of their sun care or sun defence products. In fact, over the last few years, sun care products in the FMCG space have been gaining traction as the segment is being given better visibility than even before.

Brands have been launching aggressive ad campaigns persuading consumers, especially women, to protect their skin against damage from prolonged exposure to UV rays (believed to cause skin problems such as tanning, brown spots, uneven texture and even skin cancer). They have been targeting men too who are also becoming conscious about maintaining their looks, and are equally keen on avoiding the harmful effects of ultra-violet rays. But considering that the segment is still under penetrated, and holds a lot of potential to grow at a faster pace, more efforts are required by the brands to create greater awareness on their usage and types of sun care products available in the market.

Overview

Currently, the sun care market is represented by a slew of sunscreens, sunblock lotions and creams from several brands. According to global research firm Mintel Group's report on the Indian sun care retail market, products include sun protection sunscreens, accelerators, self-tanning and after-sun products for adults as well as for children. However, self-tanning products are almost negligible and figure very low in the segment.

According to Mintel, the market size of sun care products was around Rs 1200 mn in 2010, which grew to Rs 1290 mn in 2011, and was forecasted to be Rs 1407.8 mn in 2012. The current market size is estimated at Rs 1555 mn with a growth rate 10.5 percent. Mintel's report states that the market value is based on sales through all retail channels, including direct to consumer. It includes mass market and prestige lines, but excludes sales to the professional sector such as beauty/ tanning salons.

Ashutosh Bhardwaj, CEO, VLCC Personal Care (the personal care arm of beauty and wellness chain VLCC), pegs the sunscreen market in India somewhat higher at around Rs 200 crore (Rs 2,000 mn), and growing at 19 percent per annum. "Both domestic and MNC brands have managed to gain share in the segment over the years as more and more customers enter the category," he says.

Retail

The segment offers various brands - both mass and premium (Indian and imported). These brands are available through direct distribution channels such as Amway, Avon and Oriflame, and through retail stores. At the retail end, leading brands such as Lakme, Lotus Herbals, Loreal, VLCC, Nivea, Himalaya, Ayur, and Lacto Calamine are competing for prime shelf space.

Shares Venkat Narayanan, Chief Merchandising Officer at Spencer's Retail, "Going by our store's sales analysis, Lotus is the market leader with over 40 percent share of the market. Other leading brands in our stores are Olay, Neutrogena, Garnier, Shahnaz Hussain and VLCC.

At Ludhiana-based food and grocery store Kipps Mart, Lakme, VLCC, Nivea, Loreal and

Himalaya are some of the more popular brands. "The largest selling brand in our store is Lakme followed by VLCC," informs proprietor Hitesh Arora.

There is another set of brands, namely, Dermalogica, Herbal Life, H2O and Avène. These are available either at exclusive company-owned retail stores or at select professional salons, health and beauty centers, and at pharmacies, and consumers buy them usually on a skin expert's recommendation.

Priced ranging from around Rs 86 to over Rs 1500 (depending on the brand, SPF and pack size), sun care products available in the market cater to all socio-economic categories of buyers. Plus, there are variants for men, women and children, and some even customised to suit individual skin types. Says Bhardwaj, "Both modern trade and traditional trade contribute to category growth depending on the brand and it's pricing and positioning. Premium brands sell well in an experiential format store, that is, modern trade and in A-class traditional outlets where beauty advisors are present. Consumers also look forward to samples, trials, offers and freebies at hypermarkets."

"Both hypermarkets and supermarkets have helped in the growth of the sunscreen category. Hypermarkets have an edge owing to the bigger range that they offer to prospective consumers along with branding space," he adds.

Referring to a performance analysis of sun care products at Spencer's, Narayanan informs, "Sun care products have penetrated all the regions. About 51 percent of sales are generated from South India, followed by 33 percent from East India, and 15 percent from the North."

The sunscreen market in India is somewhat higher at around Rs 200 crore, and growing at 19% per annum

– Ashutosh Bhardwaj, CEO, VLCC

Selecting the right product

The consumer may be spoilt for choice, but she is certainly at her wit's end when deciding on the brand. An expert advises that the important deciding factor to consider while selecting a sun defense product is its SPF (sun protection factor) number - a rating that denotes how much sun protection is offered by the sunscreen or sun block. The SPF is derived by calculating (or comparing) the amount of time taken to cause sunburn on protected skin to the amount of time needed to cause a sunburn on unprotected skin. Brands offer sun block products with SPF as low as 2 to as high as 100.

"Products with SPF between 20 and 40 are most preferred in India. Customers decide on their SPF requirement based on the amount of time they spend outdoors and also on the hour of the day, for instance, usage increases when one is outdoors (around noon) and vice versa," informs Narayanan.

Bhardwaj adds, "The most common SPF for Indian skin types is SPF 30. However, depending on their skin conditions, consumers choose from a lower SPF 15, which is meant for sensitive skin, to a higher SPF depending on their skin conditions. Consumers may require a higher degree of protection due to the sun's ageing effect or the adverse reaction on the skin due to strong UV rays. There are other value-added offerings such as the sweat-free variant with SPF 40, and a hydrophobic sun block SPF 50, which is water resistant."

Another important decision is whether to buy sun block or sunscreen. The two are different in their formulation and usage, but are mistakably used interchangeably. There are two categories of UV rays: UVA and UVB. UVA rays are more harmful because they tend to cause long term damaging effects on the skin, whereas UVB rays cause sunburn and photo ageing. As per industry experts, sunscreens allow a little filtering of UVB rays in the skin, so it needs to be re-applied after every 2-3 hours; whereas sun blocks contain zinc oxide that deflects the UV rays from the skin altogether, and do not require re-application So, clearly depending upon the type of climate in the region and time spent outdoors under the sun, one should decide on the right skin protection.

Apart from sunscreen and sun block lotions, there are make-up products with varying degrees of SPF, which are quite popular as such products offer the dual benefit of skin care and beautification. Innovations such as incorporating sun care properties within skin and beauty products such as body lotions that also contain SPF will make consumers see see it as a value addition to the lotion.

Usage

Going by the usage pattern, it has been observed that the sun care market is considered a seasonal product. Customers, by large, associate the product with the summer months, and there is hardly any usage during the winter months. "A sunscreen, typically, should be used throughout the year, because even the mild winter sun is not devoid of the harmful UV rays. However, awareness about this fact is still low., so bulk of the sales happens from March to June," says Bhardwaj.

Purity in every pack

Savour a delicious range of food products from a company that has established goodwill from over 30 years. DRUK has opened up to the world market, a reservoir of delicious products that are packaged and presented to perfection. Manufactured by Bhutan Fruit Products Private Limited, DRUK products are nurtured by traditional eco-friendly agro management techniques and are available in a range of SKUs.Over the years DRUK has also won 4 prestigious 'MONDE INTERNATIONAL AWARDS' in Madrid and in Lisbon. Today, three decades later, DRUK continues to serve delicious and healthy products with expertise and consistency.

Breakfast Table

Mixed Fruit Jam,
Mango Jam,
Pineapple Jam, Guava Jelly,
Strawberry Jam,
Apricot Jam, Apple Jam,
Orange Marmalade,
Cornflakes and Oats.

Any Time Kitchen

Canned Fruits & Vegetables:
Pineapple Slice,Pineapple Tidbits,
Tomato Puree, Bamboo Shoot,
Baked Beans, Sweet Corn and
Baby Corn

Pickles & Chutney

Mixed, Mango and Green Chilli
Specialty Pickles: Dalla,
Mango Kasundi,
Sweet Mango Chutney
South Indian Pickles: Lime, Garlic,
Tomato Thokku, Cut Mango Pickle,
Mango Thokku, Andhra Avakai

Beverages

Juices:
Tomato, Orange,
Mango and Pineapple
Fruit Drinks:
Guava, Mango, Pineapple,
Orange and Apple
Squashes:
Mango, Orange,
Pineapple and Lemon

Any Time Drink:
Lemon Barley Water, Lime Juice Cordial
and Mango Panna
Crushes: Strawberry, Mango, Pineapple,
Grape and Orange
Syrups: Raspberry, Khus and Rose

Sauces & Relish

Tomato Ketchup,
Sweet & Spicy Sauce,
Green Chilli Sauce, Red
Chilli Sauce,Soy Sauce,
Mustard Kasundi

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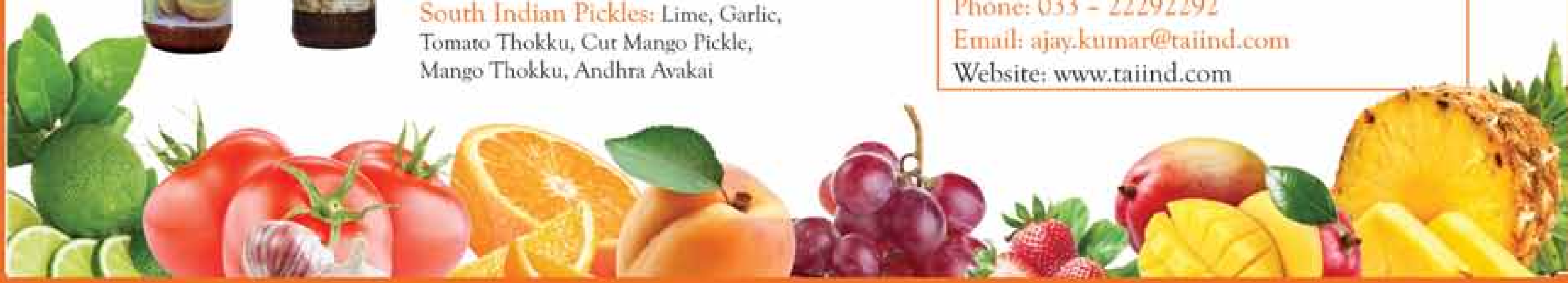

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