

# PROGRESSIVE GROCCER

NOVEMBER 2013

AHEAD OF WHAT'S NEXT

VOLUME 7 NUMBER 11 Rs 100

INDIA EDITION

**INDUSTRY INSIGHTS** • 16  
The Future of Food

**STORE OF THE MONTH** • 24  
ShopRite, Vineland

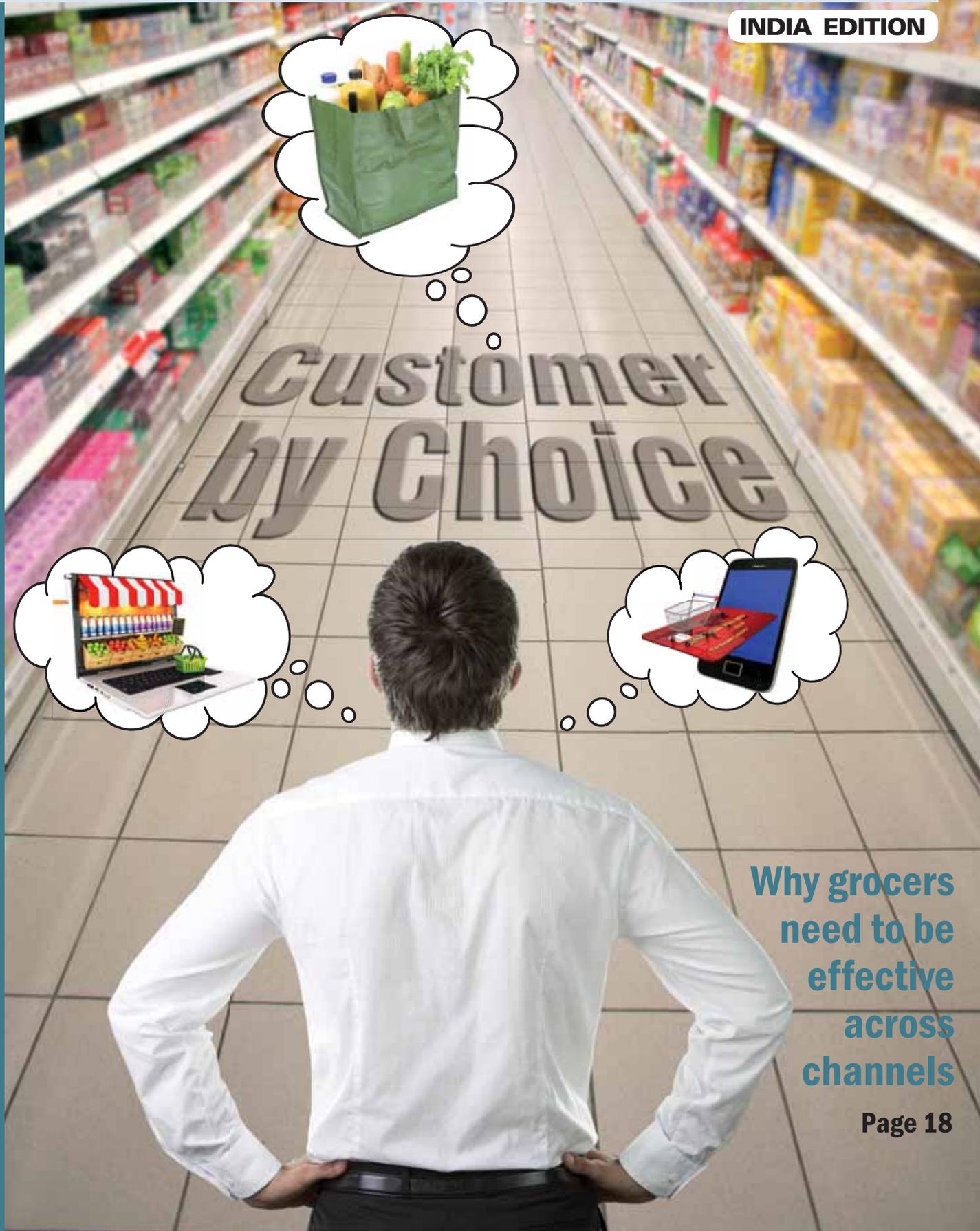


**ICECREAM** • 30  
A Wintery Tale

**PRODUCT WATCH** • 40  
Frozen Snacks



**DESIGN** • 42  
Brilliant Blueprints



Why grocers  
need to be  
effective  
across  
channels

Page 18

## PROGRESSIVE GROCER INDIA

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# Shoppers at the crossroads

The old traditional linear journey of shoppers through the aisles and gondolas of supermarkets is changing. Customers who are now presented with a myriad retail choices, have the luxury of choosing one of several channels available to them, depending on their convenience (and mood!), which at any given time, could factor in their sense of comfort, sense of urgency, paucity of time, dread of travel, or desire for some shoppertainment.

Not surprising then that the bemused grocer is trying to gauge his customer's next move. As the retail industry evolves, he is being forced to offer both offline and online touch points if he is to remain competitive. He must build his grocery business from a customer centric perspective, which must include serving customers via many channels (Internet, telephone, home delivery, mobile vans, catalogues, kiosks). The customer is dictating the route he/she wants to do business in, and now grocers must put in place systems and processes that will facilitate the customer's shopping experience. By using a combination of channels, they can leverage the unique benefits of each channel to attract and satisfy their customers.

The growth of alternate retail channels will make it crucial for brands and retailers to devise their marketing strategies around these retail formats in addition to the conventional brick and mortar retail channels. They must also look at alternate retail channels as an integral driver of growth in the coming decade. It is hoped that competition will drive grocers to innovate and renovate in order to remain the most preferred shopping channel.



Amitabh Taneja  
 Editor-in-Chief

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# PROGRESSIVE GROCER



## COVER STORY

### 18 Customer by Choice

As the retail industry evolves, customers have the benefit of enjoying various retail channels which include offline and online touchpoints; and as technology blurs the lines between physical and online retailing, grocers and their supply-chain partners will need to rethink their marketing strategies to remain competitive

## FEATURES

### 14 Progressive Views

For brands plying products in emerging economies, with billions of consumers and billions in potential revenue, the challenge is in serving and managing thousands of distributors and retailers

### 16 Industry Insights

What will it take for the food industry to keep up with the booming human population, and what will consumers demand from grocers and food distributors in the future?

## FOOD & GROCERY

### 24 Store of the Month

Shoprite of Vineland that debuted less than two years from its start date, is a brilliantly reimagined replacement store that helps the Bottino family reassert its commitment to excellence and innovation

## PRODUCTS

### 30 Candy & Snacks

Retailers and manufacturers can lift sales by finding reasons to celebrate all year round, and giving shoppers more choices

### 32 Icecream

With the market place teeming with a host of frozen variants, consumers are beginning to enjoy them even in the cold months, leading to an upsurge in winter sales

### 38 Fresh Food

To maximise sales and loyalty, grocers need to be ready for holiday meat and seafood demands

## PRODUCT WATCH

### 40 Frozen Snacks

Innovation and differentiation will be key for brands, as will creating awareness of their products and their usage

## REGULARS

### 8 Market Update

What's new in the F&G market

### 10 Industry Speak

Virtual reality technology is gaining steam in the CPG industry, enabling brands and marketers to transform store merchandising and shopper marketing programmes

### 12 Round Up

National and international company updates

### 42 Design

Showcasing Progressive Grocer's fourth annual Store Design Contest winners

### 64 What's Next

New products in the market

### 66 Retail Guide

Modern Retail: Growth through winning front-end teams

### 68 Business Opportunities

Fresh avenues to expand and grow

# CUSTOMER



**As the retail industry evolves, customers have the benefit of enjoying various retail channels that include offline and online touchpoints, but grocers and their supply-chain partners will need to rethink their marketing strategies to remain competitive**

By **Manisha Bapna**

**T**he old traditional linear journey of shoppers through the aisles and gondolas of supermarkets has been changing definitions with the myriad choices available to the customer today. Billions of grocery shopping trips are made each month around the world with the same general purpose of buying items but with specific rationale behind each trip. Understanding shopper needs and offering the right merchandise mix is what every grocer attempts to do, but what has now become challenging is to know 'how' a shopper wants to shop.

The brick-and-mortar store is no longer the only touchpoint a retailer has with the consumer. Now, websites and e-commerce sites have become alternate channels, across which retailers have to offer the same consistent shopping experience. As the retailing industry evolves, customers have the benefit of enjoying various retail channels that include offline and online touchpoints such as the Internet, a physical shop, a mobile site, a

catalogue or brochure, an e-commerce site, social media and so forth. And as technology blurs the distinctions between physical and online retailing, retailers and their supply-chain partners will need to rethink their competitive strategies.

A study titled 'Emerging Trends in Retail and Consumer Products' by consulting firm Technopak reveals that buoyed by growth in modern retail and alternate channels like e-retail and home-shopping, the retail sector is projected to grow at a compounded annual growth rate of 6 percent to touch \$865 billion by 2023.

### Alternative channels

Today, shoppers have various options to shop from supermarkets, home delivery, neighbourhood stores, online, via smart phones, etc. They move fluidly through various channels according to the time available, product requirement, time of the month, number of people accompanying them, and

their particular preferences and enjoyment time. Offering easy access and reach, non-store retail formats are increasingly becoming salient and are cutting across geographies and consumer segments. Nearly 40 percent of the orders placed on a home shopping network are placed between 11 pm and 6 am. The transition in consumer behaviour is further aided by the rapid penetration of digital products such as PCs/laptops, mobile phones (smartphones), and tablets driven by increasing affordability and need of such devices.

"Shopper's view of channels are ever evolving as their shopping needs change over the month. Shoppers decide what to buy differently depending on the channel where they are shopping. They define different channels relative to their varying needs as opposed to the accepted industry norms and static definitions of the retailers and manufacturers," opines Pooja Passi, TNS Retail & Shopper Lead.

According to Technopak, the alternate retail landscape is rapidly evolving with the disruptive growth of direct selling, home shopping, and e-tailing retail channels. Leading the non-store retail segment, the e-tailing market is estimated at ~USD 1 billion, in 2013, and is projected to grow at ~50 percent year on year to reach ~USD 56 billion by 2023. Reach and convenience are compelling differentiators of alternate retail channels:

**Reach:** The aspirations of consumers in small cities and towns (beyond the top 15) are increasingly converging with the aspirations of consumers in metros and mini-metros. Exposure and affordability are driving this parity. However, brick and mortar's limited penetration in these towns has created a sweet spot for alternate retail channel to grow and thrive. This



Pix: shutterstock.com

trend will continue to grow unabated. Nearly half of current e-tailer's sale come from towns and cities beyond the eight metros.

**Convenience:** Urban consumers have increasingly become time poor, which is leading to a conflict between consumer's desire and ability to shop. Transport, accessibility, work-life balance, etc, limit the urban consumer's ability to shop at will. Therefore, the desire to buy is increasingly getting expressed through the growth of alternate retail channels. Offering easy access and reach, non-store retail formats are becoming salient and are cutting across geographies and consumer segments. Nearly 40 percent of the orders placed on home shopping network are placed between 11 pm and 6 am.

### Home delivery

Home delivery offers many advantages to brick-and-mortar formats as it allows the retailer the ability to tap more consumption occasions and touchpoints than the on-premise only consumption model. It also allows the retailer to serve customers who desire the product more than the experience, thereby minimising lost sales. This results in improvement in store EBIT (earnings before interest and taxation) levels by 2-4 percent, provided home delivery can reach a share of 25-30 percent in the stores' retail sales.

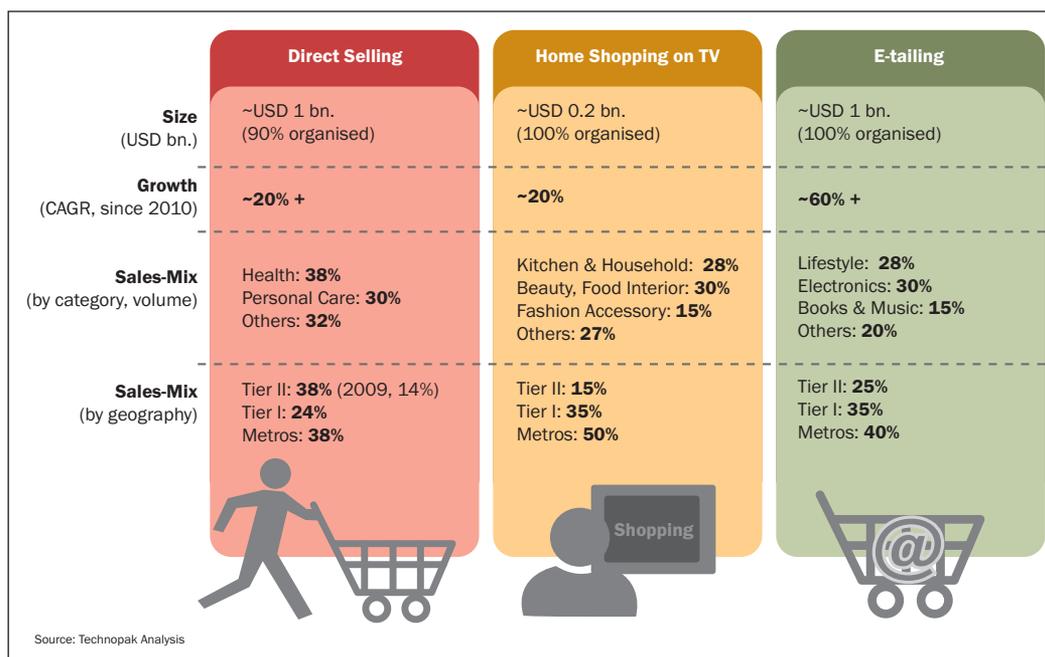
People prefer stores closer to their homes which are small independent outlets, usually owner operated with service conducted over the counter and are within 5 minutes of their travel, for their day-to-day purchases. These outlets do not give shoppers the freedom to pick their own products from the aisles but offer a huge advantage of an interest-free, short-term lending with a home delivery service. These stores are largely cash-in-hand economies and enjoy competitive advantage of having an efficient home delivery system regardless of the order quantity.

"That is precisely why neighbourhood stores with or without self-service steal the



## We recognise the growing power of the Internet and are exploring the possibility of offering the convenience of online shopping to our customers in the next 18 months

— Darshana Shah - Sr. Vice President - Marketing & Visual Merchandising, HyperCity



major portion of the wallet of the customer as compared to super or hypermarkets," feels Jignesh Bhai of New Grand Store in Andheri, Mumbai.

"Home delivery system is prevalent not only in Indian market but is strong even in Egypt. We have just started home delivery for customers living in the Santacruz - Andheri belt. This is a pilot project and items are delivered from our flagship store in Malad. While our loyalty programme Discovery Club customers are informed about our offers via our periodic newsletters, other customers

in the region are informed via fliers that have our call centre number. The minimum amount of the order should be Rs 1,000, and the items are delivered within 24 hours. We do not deliver perishable items like fruit and vegetables as they could be damaged in transit," reveals Darshana Shah, Senior VP, Marketing and Visual Merchandising at HyperCity.

"The home delivery concept started with the urge to give special treatment to our customers and support aged shoppers. We started home delivery from 1972. Though we recommend customers to visit our stores to know firsthand about our latest offers and schemes, home delivery today is a part of service and a need of the time, which increases our credibility as well," says Anil Kankaria, Owner of Navjeevan Stores in Mumbai.

One of the challenges brick-and-mortar grocery stores face is the shipping and transportation costs. To economise the rising costs, retailers are looking at alternative channels of reaching out to the consumers, who are also opting for grocery stores that



## Shoppers define different channels relative to their varying needs as opposed to the accepted industry norms and static definitions of retailers and manufacturers

— Pooja Passi, TNS Retail & Shopper Lead



# A Wintery Tale

**Icecream is typically regarded as a seasonal product, with demand peaking during the summer months. Winter witnesses a sharp decline in consumption and resultant dip in sales and profits. However, with the marketplace teeming with a host of innovative frozen variants, which consumers are enjoying even in the cold months, there is a surge in winter sales**

By Namita Bhagat

## **Icecream market in India**

India's current icecream market is worth Rs 3,000 cr, including the unorganised sector. The branded market has a host of homegrown and international players, namely, Amul, Kwality Walls, Mother Dairy, Vadilal, Cream Bell, Baskin-Robbins, etc, amongst the the prominent ones. Whilst Häagen-Dazs, Baskin-Robbins, London Dairy, New Zealand Naturals, and Hokey Pokey cater to the high-end market, the likes of Amul, Vadilal, Cream Bell and Mother Dairy are available at wide-ranging price points. Lately, the imported concepts such as frozen yogurt and gelatos are gaining popularity. The more recognisable

Fro-Yo brands are Cocoberry, Red Mango, and Yogurberry, while Amore, Gelato Vinto and Gelato Italiano are popular gelato brands, and primarily belong to the super premium to premium segments.

However, per capita consumption of icecream in India is quite low. R S Sodhi, Managing Director, GCMF (Amul), informs, "We are still at the level of 400 ml of per capita consumption of ice cream per year compared to the global average of 2,300 ml. Unlike the West, Indians enjoy a range of other sweet options such as the traditional mithai, but the icecream is slowly increasing its share of the Indian palate."

Subhashis Basu, Business Head-Dairy Products, Mother Dairy Fruit & Vegetable, says, "Internationally, icecream is treated as a habitual intake. In India, the category is more aspirational, impulsive and treated as a relief in the scorching summer months, so it offers immense business potential that is yet to be tapped."

"Evolved markets are on a different footing. Frozen desserts category is still a long way from becoming a part of diet/food plan of locals. The scenario is gradually changing wherein other than tier 1, 2 and 3 markets are also moving up the consumption ladder," observes Nitin Arora, CEO of Cream Bell.



## India's current icecream market is worth Rs 3,000 crore, and one of the fastest growing food categories

### The business

Increasing urbanisation, rising incomes, consumer awareness, improved cold supply chain, growing deep freezer penetration, and growth of modern format retail facilities are giving a fillip to the country's frozen desserts business, which is highly capital intensive. Diverse distribution channels are used for retailing. Says Basu, "In addition to traditional retail set-ups comprising pushcarts and local dealers, we also have our exclusive stores, parlours and kiosks, besides our institutional sales. Amul, the only national brand, commands 40 percent share in India's icecream market, and operates retail formats like Amul Parlours (APOs), Scooping Parlours, Push Carts, besides the general retail outlets. Cream Bell follows the hub and spoke distribution model with over 600 distributors spread across 19 states to feed its retail trade.

Furthermore, brands such as Amul, Kwality Walls, Vadilal, and Baskin-Robbins have successfully leveraged the franchise business model for expansion. Regional players like Mumbai-based Natural and Chennai's Arun (owned by Hatsun Agro) have also franchised their way to growth. The frozen yogurt and gelato businesses, catering to upscale clientele,

are primarily limited to high streets and malls via company-owned or franchise stores.

### The seasonality factor

Icecream is one of the fastest growing food categories in India. Notably, the business is seasonal in nature with April to June being the peak season and November to January the lean months. Sales slacken during the monsoons also. R S Kamath, CMD of Kamaths Ourtimes Icecreams, which owns the Natural brand (115 stores across the country), shares his understanding of consumer buying behaviour. "The traditional negative health perception for frozen desserts intake during cold months is a key reason for the sharp decline in winter consumption." The brand's sales dip by 10-15 percent during winters.

But it is worth mentioning that icecream/frozen desserts consumption in winters follows an inconsistent pattern depending upon severity of the cold climate in a geography where products are sold, type of products, consumer class, etc.

"Amul's winter sales are about 55 percent of the sales achieved during the peak months," shares Sodhi. According to him, extreme winters also affect icecream sales in northern and eastern India, whereas western and southern regions do not see a drastic decrease in consumption. Nitin Arora states that Cream Bell's summer sales account for almost 50 percent of its annual turnover, but winter sales dip to nearly 30 percent of an average peak month. At Mother Dairy, nearly 40 to 50 percent of annual sales are during the summer season.

The still niche Gelato and Fro Yo categories reflect lesser sales fluctuations. These segments find dedicated customers even



Subhashis Basu - Mother Dairy

almost throughout the year. Akshay Batra, COO of Gelato Vinto, clarifies, "We serve gelatos at -14 degree celsius as compared to other icecreams and hence it is less freezing." The chain with 52 outlets across Delhi/NCR, Punjab and UP reports sales drop of 15 percent. Amore Gelato which runs more than 30 outlets in Mumbai, Surat and Hyderabad, has a net 5 to 10 percent winter sales fall from its average monthly sales.

"Our sales have increased from 10-15 percent, even though we came to India only in late 2011. We do experience 15-22 percent dip during winters in Delhi, but in Mumbai and Bangalore, sales remain almost the same," declares Pawan Batavia, Director, Synergy



Pawan Batavia - Yogurbery



Orchard Fresh, Orchard Park, New York

# Brilliant Blueprints

From a vastly remodelled store that went from drab to fab with an additional 15,000 sqft of space and a complete floor-to-ceiling facelift, to a transformed space that merges a warehouse format with an ultra-modern vibe and top-of-the-line services, to a store whose produce department features Tiffany-inspired windows and overhead conservatory arches — these and 21 other supermarkets that have opened their doors during the past year have been chosen as winners of Progressive Grocer's fourth annual Store Design Contest. Five budget categories — two for new ground-up construction, as well as three for remodeling projects ranging from modest to massive — once again provided store design teams a chance to be recognised for outstanding achievements in innovation, form, functionality and creativity.

Having received the highest-ever number of Store Design Contest entries this year, our judges had a challenging time winnowing the original pool of more than 50 to a total of 17 first-place winners, each of which is profiled on the following pages. Additional coverage of our Store Design Contest's excellent runners-up and honorable mentions can be found at [Progressivegrocer.com/2013StoreDesignContest](http://Progressivegrocer.com/2013StoreDesignContest), which also features expanded photo galleries and video clips.

By **Meg Major and Jim Dudlicek**



**Best Overall Design  
New Construction Over 50,000 sqft**

The grabber: A 3D décor element of a semi-trailer truck complete with real lights and horn, appears to back through the wall of the dairy department, with an image of owner Larry Reasor in the cab. This store was designed to appeal to an upscale community in Bixby, Oklahoma, as well as the mid-market grocery shopper, through use of a base neutral-colour palette departmentalised by theme and motif.



**STORE:** Reasor's

**NEIGHBOURHOOD:** Bixby, Oklahoma

**DESIGNER:** Associated Wholesale Grocers Inc

**Most Progressive Features**

The produce department uses Tiffany-inspired windows, overhead conservatory arches and a huge skylight to emphasise the "Garden Spot of Bixby." Track lighting using the latest in LED technology enhances the product on tables. The meat and seafood departments are uniquely defined yet connected through a mural that depicts the progression from pasture to pond, boasting a 3D boat and fish swimming to the department.

**Hot Trends**

The Kitchen Connection is an architectural billboard for kitchen demos that flanks the kitchenware department. A trellis above the floral department is finished to look like greenhouse wood. Routed metal-arched structures impart warmth and comfort to the checkout area.

## ▶ The angry birds are here

Singapore-based The Cocoa Trees has introduced its internationally leading Fazer Angry Bird chocolates range in India. The Fazer Angry Bird range offers sweets, lollipops, chocolate eggs and chewing gums. The lollipops are available in three flavours of strawberry, pear and cola, priced at Rs 290 for 120gm. Chewing gums are claimed to be tooth-friendly and come in four variants - summer, strawberry, cool, and refreshing eucalyptus - priced at Rs 495 for 70 gm. Fazer Angry Birds chocolate eggs are available at Rs 795 for 100 gm. A 120-gm pack of colourful sweets offer candies. Fazer Angry Bird Collection is available at all The Cocoa Trees outlets - three stores in Mumbai (including one at Mumbai airport), three in Pune, one in Delhi T3 domestic airport and one in Goa.



## ▶ For all-round development

One of India's leading health supplements company, Medinn Belle has launched a special health supplement for children under the brand name Endura Kidkilos. It is claimed to contain all the essential nutrients for kids within the age-group of 3-10. According to the company, in addition to providing all the necessary minerals, vitamins, carbohydrates, fats and protein to kids, Endura Kidkilos ensures that children gain and maintain the right weight as well. Available at all leading retail and medical stores, Endura Kidkilos is priced at Rs 290 for 250 gm and Rs 525 for 500 gm.



## ▶ Crunchy moment

Regal Speciality Foods, one of the leading importers, has introduced Macadamia Roca buttercrunch toffee under the brand name Brown & Haley.

The Macadamia Roca is claimed to be a natural product without any artificial colour and preservatives. It is claimed to be made of Macadamia from Australia, using butter from Washington. Brown & Haley Macadamia Roca buttercrunch toffee is available for Rs 449 in a pack of 113 gm.



## ▶ The white revolution

One of the fastest-growing Indian dairy companies, Neo Milk Products has expanded its dairy product portfolio with the launch of paneer (Indian cottage cheese) under the brand name Neo. Neo Paneer is claimed to be made from pure milk and contains no powder or preservatives. The product comes in 200 gm pack at a price of Rs 55. It is available at modern trade outlets such as Big Bazaar, Reliance Fresh, Sabka Bazaar, Spencer's and traditional grocery (kirana) stores.



# make them crave for more

Is it the unforgettable fragrance? Or is it the flavour that casts a spell around the table? Perhaps the answer lies in the smooth and pearly grains that make every mouthful a heavenly experience. Honestly, we don't know what makes India Gate Basmati the eighth wonder of the world, but we do know that they'll always return for more.



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