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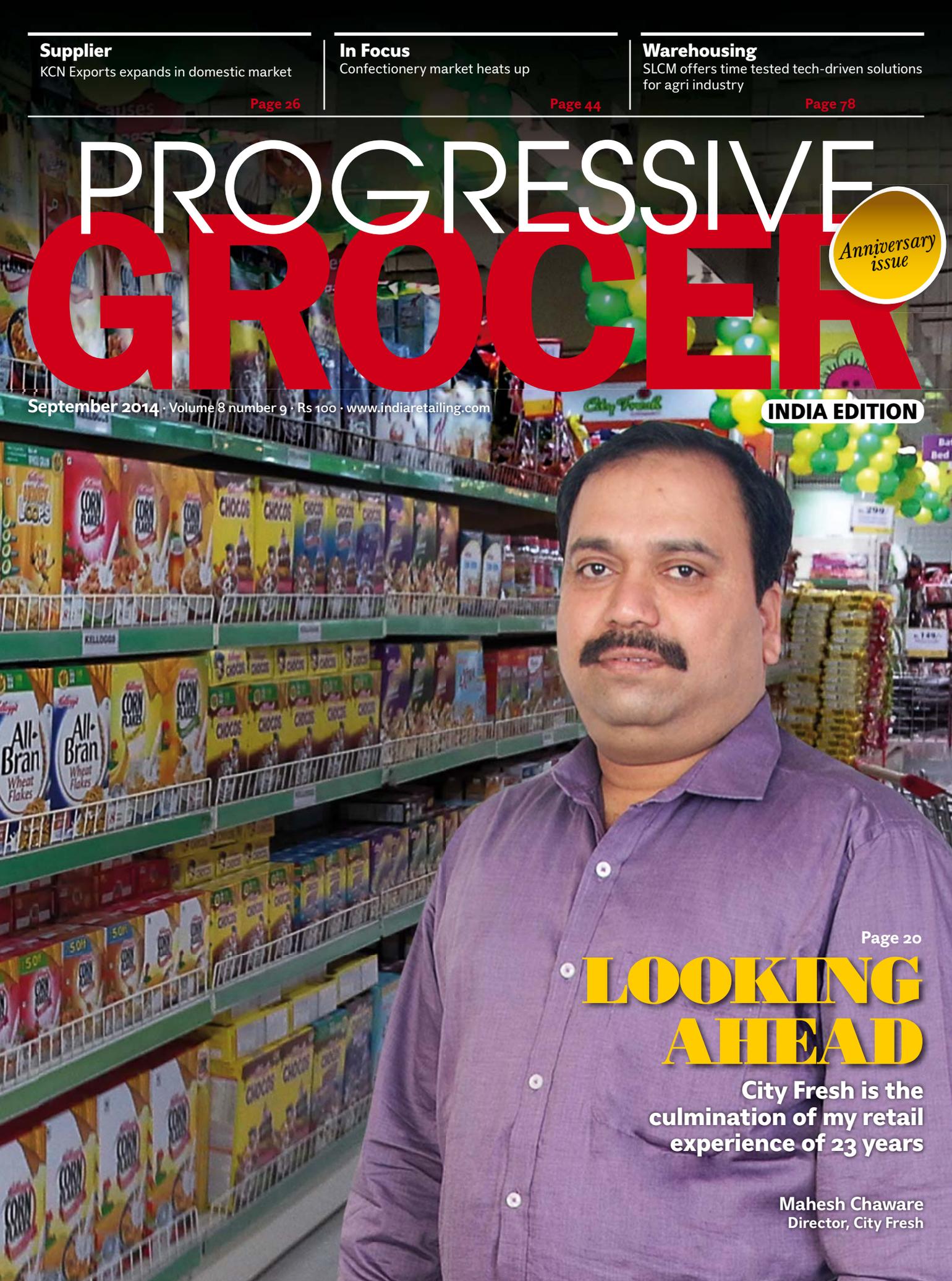
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PROGRESSIVE GROCCER

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INDIA EDITION



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LOOKING AHEAD

City Fresh is the
culmination of my retail
experience of 23 years

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Director, City Fresh

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Health benefit in every bite

Health consciousness has certainly caught the attention of manufacturers as consumers demand health benefits even in the ubiquitous candy. In fact, the last couple of years have seen a spate of product innovations, value-additions, and new launches in the confectionery market, with cereal bars emerging as the fastest growing due to their health quotient.

The entry of multinational companies in the Indian confectionery space has not only increased competition, but also the per capita consumption, as they have been launching new products at affordable prices, and creating awareness through advertisements and promotional campaigns. The choice of confectionery as an attractive gifting option is also driving the category. Marketers are now eyeing the untapped potential in rural markets.

Backed by these factors, the Indian confectionery market is expected to grow at a CAGR of more than 18 percent during 2012-2015. In this issue, we analyse the factors behind the candy's growing importance as an impulse buy.



Amitabh Taneja
 Editor-in-Chief

All feedback welcome at editorpgindia@imagesgroup.in

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The last couple of years have seen a spate of product innovations, value-additions and new launches in the Indian confectionery market. According to industry experts, with young consumers looking for newer formats and flavours in confectionery, manufacturers were induced to cash in on the demand and expand their product range

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Mahesh Chaware, Director of City Fresh chain of Food and Grocery stores in West India, speaks with Vikas Maan about his retail business

How many stores and formats are their under City Fresh and where?

We are presently 5 stores with a majority of them in tier 2 and 3 cities. We currently operate three formats – Hypermarket (above 15,000 sqft), Supermarket (8,000 – 15,000 sqft) and Express market (upto 8,000 sqft); these are neighbourhood convenience stores. In highly dense urban areas, we operate a supermarket while in lower density areas, we prefer to operate the express format. In tier 2 and 3 cities, we prefer to operate a supermarket, but the stores here are without air-conditioning.

How did you enter the food and grocery retail business?

Retail has been my only experience and I have spent 23 years in this field. My experience extends to all areas of function – buying, merchandising, category management, store operations and marketing with various types of retail entities viz co-operate stores, phone commerce, and with supermarkets and hypermarkets. City Fresh is the culmination of my retail experience of 23 years. The name

simply represents our commitment to keep our merchandise fresh and of the best quality.

Presently, we don't have a private label portfolio, per se, but at each store we offer carefully selected and sourced grocery items such as pulses, grains, etc, and package them under our own label.

How has your retail business grown in the last two years?

Our growth strategy has been primarily aimed at single store growth, though we have been aggressively pursuing expansion also. Presently, we are looking at increasing the per square feet earning of each store by 10 to 15 percent, every quarter.

Out of our 5 stores, our Kurla branch is the best performing in terms of overall monthly sales. In terms of per square feet earning, our store at Vita is the most promising, especially considering the fact that the city is a tier 3 city with a population of less than 50,000. Keeping in sync with our growth strategy, we are looking at single store growths, which are being primarily increased by improving the average bill size, walk-ins and conversions.



Mahesh Chaware





What is the investment and time needed to open a new store?

Our new store opening capex is less than the established retailers, and we are trying to prune the costs wherever possible, as this becomes our blocked capital. For any new store, depending on the location and the format, we can open a store within 45 days of taking possession. Our express formats can typically be opened within 7 days, while a hypermarket would take an average of 30 days. We don't operate an online format, but if any online retailer would want to tie-up with us as the ghost store, we would be willing.

For retailers like us, presently, the overhead costs only include travel and stay expenses for the central core team whenever they visit stores outside of their city.

We are currently a team of 150 people, but if you include promoters for brands, house-keeping and security staff, our strength is 200+. We are trying to keep our overheads to the minimum.

How is the Indian market growing in terms of Modern Trade?

The modern F&G retail currently touches ~Rs 17,12,000 crore and is expected to expand to ~Rs 27,41,961 in 2015. Retail is expected to become more organized at a faster pace in North India specifically because the West and South have already seen their share of trade getting organized. East India is still slightly low on potential. Most modern retailers like us are currently using the basic level of technologies, but taking a cue from retailers of USA, we are sure

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A Cut Above

Ayush Gupta, Director, KRBL Limited, shares the company's rice production capabilities and growth strategies, with Seema Gupta



How is KRBL positioned in the Indian rice market?

KRBL Limited has a 120-year heritage; it has been in existence since 1889. Today, the company is synonymous with quality and reliability, and positioned as a market leader in the highly competitive rice industry. In fact, it is the only

company in the rice industry to receive a credit rating of A1+ from ICRA.

As a public limited company with 57 percent of its shareholding held with its promoters, KRBL is the first Indian company to have brought in foreign investment.

How has the company grown since its inception?

KRBL has laid down exacting norms for every step of its operation – from selecting the right seed of paddy to be sown, to marketing and supporting its buyers. It has remained ahead of its peers by bringing in the most sophisticated and modernized milling technology, installing world class rice processing

facility, and setting benchmarks for the industry for consistency in quality, aesthetic packaging, and hygiene standards through continuous R&D, and stringent quality control at every stage from production to packaging and dispatch of the products.

What is the USP of your India Gate brand?

The older the wine gets, the finer it becomes! The same goes for basmati rice. That is why it is a challenge to sustain in this business. Basmati needs a minimum ageing period of 12 to 18 months, so as to flower with all its unique attributes. So one has to plan two years in advance. The paddy purchased during a season is kept in storage for a minimum of one year. KRBL has the capacity to store one million MT of rice and paddy at any given time, which is valued at over USD 650 million.

It is not just sufficient for a rice producer to have the capacity to block his investments for two years. It is more important for him to ensure safe storage of the paddy for such a long duration. One needs huge warehousing space with hygienic storage conditions, regular fumigation, etc. KRBL has a warehousing capacity of over 6.5 million sqft of storage space that is equipped with comprehensive



systems for ensuring maximum protection from ground moisture, rain, humidity, bird droppings, rodents, and infestation through micro-organisms and insects. Each grain of India Gate basmati rice is aged for a minimum of 12 months, which gives the rice its perfect taste, flavour and appearance, and most importantly, enables us to provide consistent quality year after year.

What is KRBL's infrastructure and other capabilities?

KRBL has a milling capacity of 195 MT per hour. It has an investment of over USD 130 million, and has the ability to process one container in 6.46 minutes to produce 43,000 containers of about 900,000 MT of rice annually. It not only mills basmati and other long grain rice for export and domestic consumption, but also (occasionally) assists the Government by milling and supplying high quality rice for its Public Distribution Scheme.

Equipped with Networked Soft Logic system, KRBL has achieved 100 percent automation. It means non-stop production, round the clock, round the year and complete online integration for easy fault diagnosis and correction. Meticulous planning, detailing and control over each step of processing (cleaning, parboiling, drying, milling, polishing, grading, sorting, weighing and packaging) have enabled KRBL to achieve almost zero-defect quality.

How strong is KRBL's distribution network?

With its strong and well-networked distribution system of more than 450 distributors and focused marketing initiatives, KRBL has expanded its customer base year after year. In the domestic market, the brand reaches 6,50,000 outlets in the country. In Modern Trade, it has tie-ups with major retail chains such as Food Bazaar, Spencer's, D'Mart, Reliance Retail, Vishal Mega Mart, N'Mart, V'Mart, Star Bazar, Auchan, Aditya Birla-More, Bharti Walmart, Reliance Cash & Carry, Metro Cash and Carry, Sabka Bazaar, Big Apple, Hypercity, and Easy Day, etc.

Which regions is your brand most popular in, and which new regions do you plan to tap?

The India Gate brand has a 31.6 percent market share (as per sales value). The South and North zones of the country are our strongest regions, where we have a market share of more than 50 percent, and where the brand enjoys a weighted distribution (proportion of total category sales happening through the outlets selling the brand) of approximately 92 percent.



How is the growing competition in the basmati rice space affecting/driving growth of the rice industry?

The Packaged Basmati Rice Industry since FY 0 - FY 13 was on a great growth trajectory with an estimated CAGR of close to 40 percent. The primary reason for this accelerated growth was expansion of Modern Trade in the retail sector. The evolution of Modern Trade changed the dynamics in the industry, and was a catalyst in making the rice industry more organised.

Basmati rice has always been a commodity driven industry; majority of the sales is still of loose/unbranded rice. But Modern Trade helped change consumer perception and made them more aware of branded products and their benefits. Growth of branded rice products began to grow and brands began to see their top lines bloom. This attracted a lot of new entrants and many more new brands.

The industry, in my opinion, is still at a very nascent stage and has a long way to go till we can really place it in the FMCG category. However, this past year, the basmati rice prices rose by nearly 30 percent, and the volume growth in the industry was only 3 percent. The competition too was very different as everyone struggled to get a greater share of the pie. Brands/manufacturers have started to adopt more clinical ways to fight competition and get the consumer mindshare. You could see hints of brands adopting 'negative campaigning' and taking the competition head on.



Ayush Gupta
Director
KRBL Limited





Sweet Indulgence

As India's confectionery market continues to evolve, interesting innovations will come to the fore and further propel growth of the market

By Juhi Sharma

Research analysis by Euromonitor International

The last couple of years have seen a spate of product innovations, value-additions and new launches in the Indian confectionery market. According to industry experts, with young consumers looking for newer formats and flavours in confectionery, manufacturers were induced to cash in on the demand and expand their product range. Dabur, for instance, extended its popular digestive brand Hajmola, and reinstated its presence in the pure confectionery segment with the launch of the Natkhat Amrud variant and Hajmola Chuzkara.

Hajmola has been a popular digestive in tablet and candy format in Dabur's portfolio. Market experts feel that the popularity of Dabur Hajmola will benefit Chuzkara as well. Comments Ajay

Parihar, Category Head-Digestives at Dabur India, "The Indian confectionery market is one of the fastest-growing in the world with a strong double-digit annual CAGR. Hajmola Chuzkara, with its unique blend of natural ingredients and good taste is liked by consumers across all age groups."

Chuzkara - a semi-liquid sweet and sour candy - has further created room for more innovations and value-addition by other brands. In 2013, Perfetti Van Melle, the ruling confectionery player in India, expanded its Alpenliebe's brand basket with the launch of Alpenliebe Spicy 1, spicy chilli and sweet mango in one tangy candy. The product was created with flavors to suit the Indian taste bud and liking for spicy, sweet and sour flavours. In the same year, Wrigley India enlarged the famous Boomer bubble gums range with the launch of Boomer jelly variant

in mango flavor. This launch followed that of Just Jelly by Perfetti Van Melle in late 2012.

Says Nikhil Sharma, Director-Marketing, Perfetti Van Melle India, "As per a Nielsen report, the confectionery category is estimated to be growing at 8 percent in 2014. While the confectionery market has always been fragmented and continues to be so with more than 3,200 brands operating in the category, growth has been driven by the emergence of new segments like Jelly, which has gained quick consumer acceptance. The category has also seen premiumization to some extent but needs to be accelerated in the coming years."

Apart from sugar-based candies, the confectionery space has witnessed a lot of action in the chocolate segment. Cadbury India, part of Mondelez International, launched Cadbury 5Star Chomp in April 2014. A new entrant under the Cadbury 5Star umbrella, it offers consumers a combination of chocolate, caramel and nougat along with the crunchiness of peanuts, and is priced at an affordable Rs 15 for a 30 gm pack. Siddhartha Mukherjee, Director - Chocolate Category and Media, Cadbury India, says, "As a category leader, we see a marketing opportunity with Cadbury 5Star Chomp and for expanding the repertoire of Cadbury 5Star. The product has been developed keeping in mind the evolving consumer palate. Cadbury 5Star Chomp will introduce consumers to a completely new chocolate format experience."

Tapping the rising affluent urban demographics, and keeping pace with market trends, Nestle India launched chocolate brand Alpino targeted at older consumers in metro cities. Alpino has been positioned as a premium chocolate, priced at Rs 25 for a pack of two bite-sized chocolates. Apart from additions by existing players, the category saw new entrées like Schogetten, a leading German chocolate brand from Ludwig Schokolade GmbH (-A Member of Krüger Group-). Schogetten comes in portioned chocolate bar format in 14 flavours, and is available in a 100 gm pack containing 18 portioned pieces, and priced Rs125.

According to Alkesh Dedhia, Director, Regal Group that operates a chain of four retail stores in Mumbai and is a leading importer, confectionery is an important segment in the food and grocery retail business. The younger

generation in the country, who are well travelled and look for newer formats and flavours in the confectionery segment has led to increase in demand. Amit Lohani, MD, Max Foods, says, "The confectionery segment has been witnessing new product launches and is an important section for any retailer as it targets children, adults, young and old, but I feel that the category requires more visibility and a stronger positioning."



Trends

As per Euromonitor, in 2013 the value sales of sugar confectionery grew by 20 percent to reach

Distribution of Sugar Confectionery by Format: % Value 2008-2013

% retail value rsp	2008	2009	2010	2011	2012	2013
Store-Based Retailing	100.0	100.0	100.0	100.0	100.0	100.0
Grocery Retailers	95.1	95.1	95.0	95.0	95.1	95.0
Modern Grocery Retailers	5.6	5.6	5.8	6.2	6.5	6.5
Convenience Stores	0.4	0.4	0.4	0.4	0.4	0.4
Discounters	-	-	-	-	-	-
Forecourt Retailers	0.2	0.3	0.3	0.3	0.3	0.3
Hypermarkets	1.9	2.6	2.9	3.2	3.5	3.5
Supermarkets	3.1	2.4	2.2	2.3	2.3	2.3
Traditional Grocery Retailers	89.5	89.5	89.2	88.8	88.6	88.5
Food/drink/tobacco specialists	3.5	3.5	3.6	3.6	3.6	3.6
Independent Small Grocers	79.7	80.0	80.1	79.9	79.8	79.7
Other Grocery Retailers	6.3	6.0	5.5	5.3	5.3	5.2
Non-Grocery Retailers	4.9	4.9	5.0	5.0	4.9	5.0
Health and Beauty Retailers	4.5	4.5	4.7	4.7	4.7	4.6
Mixed Retailers	-	-	-	-	-	-
Other Non-Grocery Retailers	0.4	0.4	0.3	0.3	0.2	0.4
Non-Store Retailing	-	-	-	-	-	0.0
Vending	-	-	-	-	-	0.0
Homeshopping	-	-	-	-	-	0.0
Internet Retailing	-	-	-	-	-	0.0
Direct Selling	-	-	-	-	-	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources





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Green Sliced | Garlic Stuffed

Red Paprika Stuffed | Jalapeño Stuffed

Hot Chilli | Lemony | Mediterranean Classic

Peppers

Sliced Jalapeños

Red Paprika

Mixed Peppers

Sauces & Dips

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Mayonnaise | Snack Dressing

Gherkins

Sweet Slice | Premium Dill
Zesty Slice | French Cornichon

Tomato

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Puree

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