

PROGRESSIVE GROCCER

FEBRUARY 2013

AHEAD OF WHAT'S NEXT

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INDIA EDITION

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In the fast lane

Information technology is bringing fundamental changes to grocery retailing in India as retailers embrace new technologies and learn how to use them to improve their operational efficiencies, expand their services, and gain better insights into customer behaviour - information which they transmit to their suppliers and gain better control over the flow of their stock.

Even traditional retailers are undergoing a transition; they have begun to spruce up their stores, increase their product offerings, instal cold storage units, and redesign their store layout to encourage self-service. Erstwhile kirana stores are also evolving into new Independent self-service formats.

So, while modern retail is growing at a phenomenal growth rate, so is traditional retail. What is fuelling this change is the evolving customer preferences, increase in purchase power, access to international brands, higher expectations with respect to product range and customer service, and increasing globalisation of trade.

By deploying technology solutions that deliver value to the shoppers, grocers can step up the challenge, and offer the best possible shopping experience. For example, they can speed up the billing and check out process, provide self service choices, and gain insight into customer behaviour. Technology for category management automates order planning, simplifies allocation and replenishment of products, and prevents stock-out and loss of sales for the retailer.

In fact, technology is considered to be one of the biggest growth drivers for food and grocery retailers as they face increasing competition from large supermarkets and convenience stores, while rising costs and inflation are putting extra pressure on prices and profits. At the same time, shoppers are demanding better value, excellent service, and a good shopping experience.

The message is clear: modernise or go into slow oblivion.

Read about how technology is impacting grocers in this issue, and why it's time for them to invest in it.



Amitabh Taneja
Editor-in-Chief

All feedback welcome at editorpgindia@imagesgroup.in

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Fresh avenues to expand and grow



Extending Reach

When Needs Supermarket opened in Gurgaon, it had the first-mover advantage. Even when more stores opened, giving rise to increasing competition and heightened consumer expectations, Needs continued to retain its popularity. Proprietor Ajay Dhar reveals the reasons why

By Annie Johnny

What makes Needs tick with the customers?

We opened our first store in October 2000. We were not the first retailer in Gurgaon - it was actually Crossroads, but once it shut down, we came to be viewed as a pioneer of sorts in the catchment. We have now expanded to 24 stores - 23 of which are in Gurgaon, and one in Delhi.

When we started out, we positioned ourselves as a store that offered a vast variety of products rarely seen in other stores. This drew customers who were confident that Needs

would meet all their needs (pun intended). Things which they could not find elsewhere in Gurgaon could be found in our store. But things have changed now as many grocery stores having opened up and they too are offering a vast variety of products. I think our strength and continued loyalty from our customers now lies in our 'convenience' - especially with respect to our location. Since we are located within walking distance from many residential societies, customers find our easy accessibility very convenient indeed.



 Ajay Dhar, Proprietor, Needs Supermarket



On an average the daily footfall at any Needs store is around 300-400



The retail chain plans to add a stationery section in around 4-5 of their outlets and a flower shop in their gourmet store

Any special customer service initiative?

We have observed that in bigger outlets there are a lot of hassles when a customer has to get his/her purchases billed or when an item has to be returned. There is a lengthy process even for an immediate return. Since we value our customers' time, we have taken care to ensure that our processes are very simple and, therefore, fast. This is but an extension of our customer service - convenience plus

value for time. We will also be starting a loyalty programme in another 3-4 months.

What are your observations of consumer preferences?

With the market opening up, the growth of imported foods and the coming of foreign companies and brands into India, the variety of food products have increased significantly. Consumers have far more choices now. There was a time when we used to bring Coca Cola cans from abroad. Now most products that we used to crave for are now easily available in India. So what has really changed is the easy availability of foreign products, and consumers now have a lot of brands to choose from. I won't say that consumers are very demanding now, rather, they are more educated, and more aware.

have another larger size gourmet stores in apartment complexes by the Group.

In another month we are planning to start a stationery section and also a flower shop. The flower shop will be only in our gourmet stores because of the larger space there. Flowers tend to smell if the water is not changed often, and maintaining them, displaying them, etc, would not be in our other smaller stores. But a stationery section will be introduced in 4-5 of our outlets.



Fact File

First store: Opened in October 2000

Current number of stores: 24

Location: 23 in Gurgaon, 1 in Delhi

Store size: 600 sqft to 18,000 sqft

Daily footfalls per store: 300-400 people

Number of skus (Grocery): 30,000

Number of skus (Food): 15,000-16,000

Number of skus (Imported food): 3000

Private labels: Needs pulses and dry fruit

Number of skus in PLs: Few hundreds

Best performing store: Sohna Road outlet

Annual turnover: approx Rs 70 crore

Expected growth (in%): approx 15%

What innovations have you introduced over the years?

In our new gourmet store located in Sohna Road we have introduced a cafe, a live food counter and a bakery. The store is about 18,000 sqft, and one of the biggest in our chain. It has been a year since we started our gourmet store and it has grown by 10 percent on a monthly basis.

We are planning more such gourmet stores for which we have tied up with the real estate developer Vatika Group. We might

What plans are in the offing?

We do have plans to increase our store count and introduce something new in them, but we have decided to wait till the market is ready for us. Opening a store is easy but to sustain it is a big problem. We would like to extend our reach outside of Gurgaon at places like New Gurgaon and Greater Noida - especially the high-end residential colonies. New areas that are coming up such as Greater Noida, hold a lot of potential, but we have to wait for people to move into their homes and settle down first before we open our stores there. We would start implementing our plans when at least 15-20 percent of the area becomes habitated.

At present, we are concentrating on upgrading our existing stores by adding the extra services and facilities mentioned above. Our aim is to offer customers a complete shopping experience under one roof

Automating Retail

Taking a cue from the fast modernising retail industry, grocers are upgrading and integrating their stores with solutions offered by new technologies

By Annie Johnny

Modern retail in India has ushered in several changes and one of the most visible impacts is the increasing dependence on technology. Traditionally, food retail in India has been a no frills business with the shop owner being the point for billing, inventory management, security and even customer service. But with the expansion of

modern retail, technology has come to the aid. The use of a POS system and high tech security gadgets have now become common, with almost all medium to large scale stores utilising them in their stores to improve customer dealing and check pilferage.

Says Aneesh Reddy, Co-founder and CEO, Capillary Technology, "In the last half a decade, technology has redefined the

ways retailers can go about their business. With the ever changing market scenario, companies are fast adopting the latest improvements and advancements that technology has to offer. As consumers are cluttered with choices, a seamless, differentiated experience has become a central focus of retailers to drive loyalty and gain a preferential share of mind."



The Indian retail market has embraced IT to encompass most of its vital operational areas. To stay ahead in the game, retailers are using technology to get better results. They are now making a fresh investment by considering these technologies more openly

— Salil Godika, Happiest Minds

Retailers in countries like the US and UK are already integrating the latest technology in their stores to not only smoothen daily operations but also attract customers, and boost their sales. “Technology helps retailers to streamline their tasks and narrow their focus on key objectives. Tesco is one example of how it uses technology to its advantage in most of key retail areas. Upgrading technology is key to success and retailers who do it regularly will have an edge over their competitors and will be far more efficient,” says Sanjay Aggarwal, Director, FRDC.

Future Forward

International retailers have gone beyond integrating their stores with IT and are instead experimenting with futuristic technology like virtual shopping. UK’s leading supermarket Tesco has already started two virtual stores

CURRENT TRENDS IN TECHNOLOGY FOR FOOD AND GROCERY RETAIL

1. mobility solutions for promotions
2. e-wallet for cash less transactions,
3. smartphone/tablet based apps for better customer engagement
4. digital signage for product info
5. electronic shelf edge labels for dynamic price update
6. variable power consumption based on store traffic
7. supporting/complementary e-commerce platforms
8. self checkout
9. kiosks with recipes, menu, ingredients, food pairing, etc
10. automation at warehouse
11. sophisticated software (ERP) for forecasting and demand management

at a South Korea subway station and at the Gatwick airport, UK. In the South Korean store, LCD screens placed on the walls of the Seonreung subway station act as shelves where over 500 products are on display with their barcodes, which the customers can scan using the Homeplus app on their smartphones. Their order is then delivered to their homes. At

efficiently. This web-based application hosts all the files and programmes and creates a network for the retailer(s), making it easier for them integrate their data and use it more effectively. In retail, it is mostly being used in areas like the point of sale (POS), enterprise resource planning (ERP), and customer relationship management (CRM).



Tesco’s virtual store at the Seonreung subway station in South Korea

the store in Gatwick airport shoppers can buy products like milk, bread, cheese, wine and chocolate.

Virtual stores have given shoppers the freedom to shop anywhere, anytime without any hassles of using a shopping cart or standing in a check out line.

Another example of stores making use cutting edge technology is the Cincinnati-based convenience store, Kroger which has installed QueVision to reduce the checkout time for customers. Quevision consists of a flat television screen. Sensors are placed at the entry and exit doors of the store, and the checkout counters monitor the number of customers shopping at a specific time. The information is sent to the system and the screens, which are installed in front of the check out counter, display the number of checkout counters that needs to be open at a particular time, and those which have to open in another 15-30 minutes depending on the rush. With QueVision, Kroger aims to have only one person waiting at the checkout at any given time.

Cloud computing is another technology which is helping retailers manage their stores

The integrated data from all the customer touchpoints helps a retailer increase his efficiency.

“Cloud-based solutions are already being used by a growing number of retailers to support their most important business functions. Easy IT infrastructure, low capital expenditure, faster scaling up, and powerful customer data have all come together to make cloud technology a dream come true for retailers,” says Reddy.

Gesture-driven technology which allows data, videos, images and text to be stored and used on interactive white boards, touchscreens and projectors with simple hand gestures, and location based shopping which enable retailers to target shoppers with smartphones are the next big technological solutions for retailers.

The use of digital coupons which are digital substitutes of coupons has also exploded into the retail landscape. These coupons which are popular for customers between the age group of 18 and 35 are usually mailed or SMSed to a set of customers who have enrolled to the retailer’s loyalty scheme or even to regular shoppers.

Meat'ing Demand

As delis come up across the country, **Shanti Padukone** finds out the current status, the challenges, and what goes into setting up a quintessential delicatessen

India is slowly getting a grip on the gourmet meat and cheese industry. As of 2012, the gourmet industry was growing at a CAGR of 20 percent, and is slated to cross Rs 13,700 crore by 2015. What is intriguing is how the current handful of delicatessens and restaurants are handling the challenges involved in importing, storing and using cured meats and cheeses (which have a relatively short shelf life) that form a large percentage of this industry.

One of the oldest local players in the meat segment in Mumbai is Roland Saldanha, Owner, Jude Delicatessen. Jude was established around 46 years ago as a one-stop shop where customers could get all their meat products - be it chicken, lamb, pork or beef. They soon expanded their product range to include processed meats like hams, sausages and salami. Today, Jude's has gone a step further with its wide range of imported cheeses, cured meats and raw meats. However, competition is strong. Just a few metres away is Sante's one of the oldest players in terms of selling gourmet meat. And Godrej Nature's Basket, which is mushrooming



o Chef Manu Mohindra, Chef and Managing Director, Under One Roof Hotel Consultants

across the country, is not far. Vishal Mehra, Managing Director, Meatrix Foods, too started his own deli, Freeman and Baker in 2011, which is now part of the competition.

But what is the industry like overall? According to Chef Manu Mohindra, Chef and Managing Director, Under One Roof Hotel Consultants, the cured meats industry is largely limited to metro cities. "While there is demand in tier-2 cities, it is limited. Even amongst metros, the volume exists in markets like Delhi, Mumbai and Bangalore," he says.

Sanjay Tandon, Director, Epicure Frozen Foods and Beverages - and Owner of Sante in Bandra, Mumbai - attributes the increasing taste for cured meats and cheeses to the fact that the Indian middle class has grown in terms of financial capability rather rapidly in the last five years. With more disposable income at hand, and a fast changing lifestyle, this class of people are travelling frequently to foreign locales and are willing to experiment with new cuisines.

Curing and flavouring

Curing meat is a form of food preservation and flavouring that goes back in time. While it essentially serves to preserve a meat, it is also a method to prepare the meat to derive flavours from the curing process. Salting, sweetening (with honey, etc) and smoking are some common methods used. Products that fall under the category of cured meats are salami, mortadella, ham, sausages, smoked ham and turkey, peking duck, prosciutto, and parma ham. Freeman and Baker in Juhu and Breach Candy in Mumbai go one step further by selling emu meat, black chicken, Japanese quail and even rabbit meat.

Apart from this, delis provide dry goods as accompaniments. So, one would typically find sauces; tenderisers; cereals like risotto, quinoa, cous cous; condiments like herbs and canned goods too. Cheeses too have become part of the process. Almost all delis sell cheddar cheese, parmesan, Parmigiano reggiano, fresh mozzarella, goat's cheese,



 Roland Saldanha, Owner, Jude Delicatessen

feta cheese, brie, etc. Apart from gourmet condiments, Jude also sells Indian masalas like the quintessential Christian masala, Shaan masala (from Pakistan), and many more. Seafood too is fast gaining in popularity with Salmon, Basa Fish, caviar, and scallops being in high demand.

Permits and regulations

The Indian law permits the import of either raw or cooked meats - but not cured meats. According to Mohindra, import regulations require that cured meats be subjected to 70°C for 30 mins, which is practically impossible in the case of cured products. As a result, several delis like Sante procure their cured meat products from local distributors since they do not want to contend with any legal irregularities. Tandon adds that a lot of it has to do with *quid pro quo*, citing the instance of the recent import allowances for lamb meat from Australia in exchange for Indian mangoes being permitted Down Under.

Mehra says, "For the import permit, one must send an application to the Agriculture Ministry with the proper specifications and ingredients about the product one wants to import. The permit can come in 15 days to three months. Once that's done, an importer must obtain a certificate from the exporter stating that their products meet the Indian

standards. "If all this is in place, the final certificate can be obtained within a month or take up to six months. When the first consignment comes in, samples are drawn and tested to check their adherence to Indian standards. Each packet must list the name of the product, the ingredients, name of manufacturer, production date, expiry date, weight, and the red/green stickers."

Despite having everything in place, challenges are high: for imports it is storage at ports - rather the lack of it - especially at the Mumbai Airport. Tandon laments about how a large consignment of his products got spoiled due to a severe shortage of cold storage at the airport. When there is a shortage of space, products like life-saving medicines take precedence over meat and dairy, which take ten days to test and permit. "As a result," says Tandon, "we now have a bonded warehouse away from the airport (in case we do get products via air), where the products can be tested before permitting."

Talking with...



Ajay Chopra

Executive Chef at The Westin Mumbai Garden City



Where do you source your meats from?

We source our delicatessen meats from reputed purveyors in Mumbai who in turn import them from foreign countries such as Britain, USA, Italy, Germany, Spain, etc. To focus on quality and because we want to give the diner a wholesome experience, about 70-80 percent of our offerings are imported.

What are the challenges in procuring the right kind of imported cured meats?

Lead time from which orders are placed till their delivery can be a constraint at times. Erratic supply can also be an issue. Costs are high as taxes and levies are added to the price. From the vendor's perspective, having necessary approvals and clearances from appropriate authorities also add to the challenges, especially if these are first-of-a-kind products to be launched in India but are popular abroad.



What is your opinion of imported and local meats?

Imported products are generally of a high quality as authenticity in flavours and taste is intact. Local products are of good quality, no doubt. Moreover, with many major names in the meat processing business eyeing the Indian market, the overall trend seems optimistic. At the end, the buyer will have more options to choose at more competitive prices.

Why is it that imports are better in quality and taste?

This is because there are specific laws in those countries that must be adhered to. For instance, a certain ham can be made only in a certain geographical area, and has to be from a particular breed/s of animals. The feed and manufacturing process is highly regularised, and there are stringent quality checks. Manufacturing of cold cuts is still practiced as an art in some places with artisanal products on offer. Farmers there

take great pride in their produce as it is more of a tradition and not wholly construed as a business.

What kind of meats are currently in demand at Westin?

We procure specialty hams, German sausages, cold cuts, raw meats, as well as certain seafoods. All of these are in great demand as a lot of guests are already familiar with these products in Europe and elsewhere, hence, there is a sense of assurance that they are getting the same quality and taste present in the country of origin. Anyway, this is expected from a top-class establishment such as Westin.

How do you manage storage and waste?

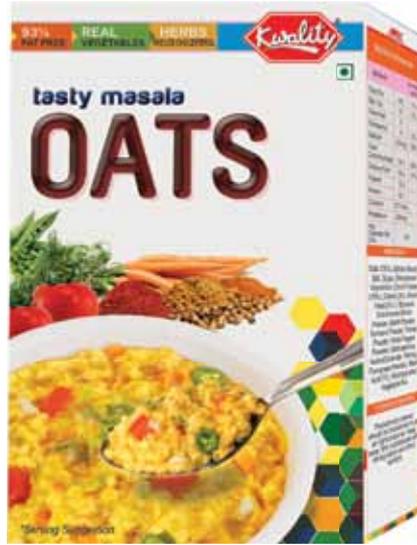
All these products are handled with utmost care conforming to HACCP standards. From the time they are received, the storage, handling and merchandising are governed by high standards of food safety. We segregate our waste produce, and the non-usable parts are disposed off under hygienic conditions.

What's Next

New products in the market

▶ Tasty and healthy

Pagariya Food Products, a leading cereal and spice (masala) manufacturer under the brand Kwalita, has introduced Tasty Masala oats, which are claimed to offer real vegetables; are 93% fat-free; and contain herbs that reduce cholesterol. The product is available in a pack of 80 gm that serves three, and is priced at Rs 25. It is being retailed at modern stores, stand-alone grocers and other grocers across South India, Mumbai and in Dubai.



▶ Action for the restless!

KG International has introduced Restless energy drink in the market. According to the company, this non-alcoholic, carbonated energy drink is developed in UK using a unique combination of ginseng and other vital nutrients. Restless's formulation helps in revitalising and energising the body and mind. Priced at Rs 90 per can, the energy packed drink is also available in a case of 24 cans. It is being retailed at leading stores in Mumbai, Delhi, Goa and North Eastern cities.



▶ Treasure of taste and flavour

Mumbai-based Shubh Food Products, a manufacturer and supplier of hing (asafoetida), has launched a new type of hing under the brand name Naya Khazana, labelled as DanaHing. It is claimed to be made using pure ingredients and helps cure kidney problems, stomach-related problems, diabetes, indigestion and toothache. According to the company, the new hing, which is valued for its aroma, is also being used by companies that manufacture spices. A pack of 50 gm is priced at Rs 201, and is available across the country.

▶ Organic growth

Mehrotra Consumer Products, a leading organic food manufacturer, has come out with organic staples under the brand name, Organic Tattva. The range includes rice, flour, pulses and spices. The company claims that all the products are certified organic as they are grown without the use of fertilisers and pesticides. Organic Tattva's rice and flour comes in 1 kg packs and pulses in 500 gm packs. The pulses are priced between Rs 65 and Rs 95; basmati rice is for Rs 150 per kg, and wheat flour is priced at Rs 45 (as a promotional offer for one month). The products will be retailed at modern retail stores and stand-alone premium food stores.



▶ Go green

Health and wellness brand Gaia has come out with an assortment pack of green tea in various flavours. The assortment pack offers five variants of green tea, plain green tea, green tea with tulsi, green tea-ginger, green tea with lemon and green tea-mint. The packs are available at all leading grocery stores and pharmacies, and can even be ordered online at www.gaiagoodhealth.com. A pack of five tea bags of each variants is priced at Rs 130.



▶ Fortune of health

Adani Wilmar, a leading manufacturer and distributor of cooking oil, has launched rice bran oil called Rice Bran Health under the brand Fortune. According to the company, Fortune Rice Bran Health is a 100% rice bran oil. It contains the highest amount of oryzanol amongst all edible oils, which improves the HDL/LDL ratio, making it one of the most heart-friendly oils. It is available at all the leading grocery stores in pouches and jars of 1, 2, 5 and 15 litres, and priced at Rs 115, Rs 230, Rs 575 and Rs 1,725, respectively.



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TRANSPORTATION



DISTRIBUTION

- 18 EU/FSSA* approved warehouses • 19,000+ Euro size pallets • Pan India network across 100 cities • 200+ owned vehicles • Reach of 4,400+ outlets • 100% power back-up with multi-generator • Temp. range: +20 to -25 °C • State-of-the-art ERP systems

VALUE ADDED SERVICES

Blast freezing | Kitting, labelling & stickering | Bulk breaking
Repacking & gift packing | Sorting, stuffing & destuffing

* Food Safety and Standards Act 2006

Snowman Logistics is part of Gateway Distriparks Ltd., offering India's largest network of Container Freight Stations and rail linked Inland Container Depots.

For more information visit us at www.snowman.in or email us at info@snowman.in

