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INDIA EDITION

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What can you expect at a gathering that attracts the most eclectic bunch of cognoscenti from the Food Retail industry? As is customary at the annual India Food Forum (organised by IMAGES Group and publisher of *Progressive Grocer*), the Conclave this year rippled with energy and its usual share of heat and light that the conferences, workshops, exhibitions, live shows and networking sessions radiated. Industry mavens who spoke on different themes and topics at the numerous panel discussions threw up interesting insights on the F&G industry. Discussions also led to information on trends, emerging product categories, understanding consumer behaviour, and on marketing and in-store promotion strategies – all of which, as everyone agreed, require joint efforts of both manufacturers and retailers.

Pages 10 to 50 of this issue of the magazine offers a conspectus of the action at the India Food Forum. For those who were not there, we bring you interesting bytes and loads of information exchanged at the Forum. Turn to pages 36 to 45 to find out the achievers who won the Coca-Cola Golden Spoon Awards for excellence in foodservice and food and grocery retail across multiple categories.

My congratulations to the winners and my heartfelt thanks to all the participants at the Forum for making the show a great success and also for making India Food Forum a stellar platform for articulating the vision of the food retail industry in the country and for forging deeper ties and understanding with all industry stakeholders.



Amitabh Taneja
 Editor-in-Chief

All feedback welcome at editorpgindia@imagesgroup.in

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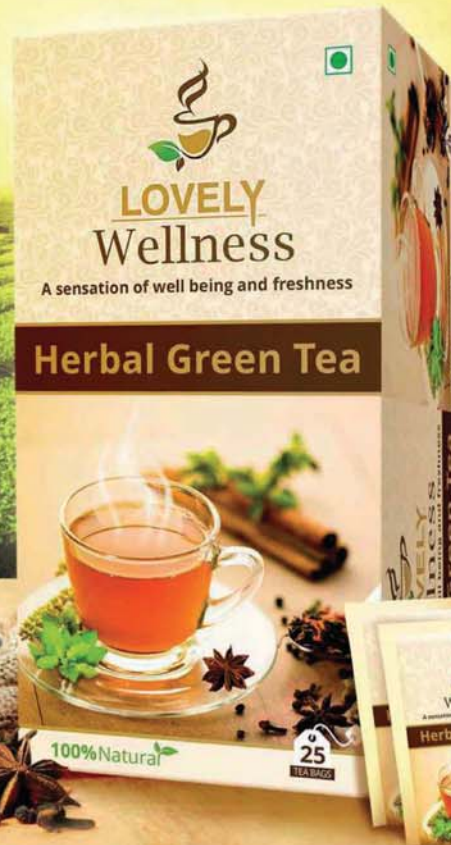
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52 FOOD TRENDS
Foodaholics, rejoice! Exciting platter on tap

54 INDUSTRY SPEAK
Budget booster for Retail Industry



56 RETAILER
Big Bazaar: Handsome payoffs from innovative tweaks

58 TECHNOLOGY
Adapting brick-and-mortar stores for omni-channel strategies

IN EVERY ISSUE



08 MARKET UPDATE
What's new in the F&G market

60 WHAT'S NEXT
New products on the shelves

62 COLUMN

10 India Food Forum 2017: Concludes on a high note

12 Much Food for Thought



16 Sri Sri Ayurveda to launch new products and open 2500 retail outlets this year

18 Win-win partnerships between brands and retailers

36 AWARDS
India's brightest shine at food retail's most exciting honours' night



30 The opportunity in digitalization

46 Exhibitors

48 Live Kitchen & Drinks Theatre



50 Networking



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Market Update

LT Foods teams up with chefs to promote basmati rice

LT Foods, which owns brands like Daawat, Heritage and Royal, is a leader in basmati rice with a brand presence across several countries, including the U.S. To promote the use of basmati, the company organised an event in the capital recently, which saw the coming together of two renowned chefs for the promotion and propagation of basmati rice. LT Foods brought together chef Joseph “JJ” Johnson, one of the top 10 rising chefs of the US and chef Sanjeev Kapoor who has been honoured with a Padma Shri this year.

Chef JJ, a highly awarded chef in New York, and who is extensively working with rice and other grains, was invited by LT Foods to visit the basmati growing farms in India and study India’s culinary and cultural heritage. At the event, he interacted with some of the leading chefs in India for a demonstration on basmati cooking, which was spearheaded by chef Sanjeev Kapoor. Chef Kapoor also symbolically handed to chef JJ the secrets of biryani making. Also attending the event was the team from Star Chefs Media who are partnering with LT Foods in promoting basmati amongst the chefs in the U.S.

Speaking on the occasion, chef Sanjeev Kapoor said: “I have been



↑ L to R: Vijay Kumar Arora, chef Joseph, chef Sanjeev Kapoor and Ashwani Arora

associated with LT Foods long before I started working with their brand Daawat. One of the main factors for this long association has been LT Food’s commitment to not only supply extremely good quality products which we can use to highlight our recipes but also their strong commitment to the chef community and working with them for delivering solutions that are relevant to the chefs. LT Foods is working similarly in the US and across the globe to spread basmati, which I believe is one of the finest rice grains.”

Commenting on his unique trip to India, chef JJ said: “Thanks to Royal Basmati and LT Foods, I have a whole

new respect for one of my favourite types of rice and I can’t wait to get back to the US and share some of the new dishes I have learnt to create using basmati rice.”

Vijay Kumar Arora, CMD, LT Foods observed: “Daawat is now a globally recognized brand and our focus towards ensuring its growth to the farthest corners of the world has now borne fruit. Daawat and Royal have become No. 1 in the basmati rice category in North America. We strive to further deliver on the expectations of our beloved customers and will look to conquer many more hearts and markets across the globe in the coming years.”

Double Horse appoints six-year-old chef Kicha as brand ambassador

Six year old Masterchef Kicha aka Nihal Raj will be the brand ambassador for Double Horse snacking range. Chef Kicha is a child prodigy who shot to international fame as the youngest star to feature in the Ellen DeGeneres TV show, in which he floored and wowed the audience by preparing Puttu on the show. The show attracted widespread notice and Kicha’s cuteness, confidence and style won him a huge fan following making him an instant star among kids and youths. With Kicha as the brand ambassador for its snacking range, Double Horse expects its new snack range to make a great impact on the young demographic.



Double Horse, which has been enriching the lives of Keralites with tasty and quality food products for the last 60 years, is coming out with a number of snacking options with the aim of offering Keralite traditional taste snacks to customers the world over. After the launch of Kerala’s very own snack – banana chips – at Onam last year, the company is now getting ready to introduce a range of healthy snacking options ranging from Cassava chips, potato chips, choco/vanilla/strawberry bites, peanut candy, etc, to name a few. Apart from snacks, Double Horse plans to come out with a number of ready-to-eat SKUs also down the line.



Manpasand to set up four new plants

Manpasand Beverages Ltd is set to more than double its production capacity in the coming 12-18 months. Four new plants are going to be set up in the future with total production capacity of 2 lakh cases per day as against the current 1.7 lakh cases per day. These four new plants with 50,000 cases per day production capacity each will come up in four different regions of India. Land has been acquired and construction has started at three of the new plants, which will be located in Sri City in Andhra Pradesh, Varanasi in UP and Vadodara in Gujarat. Manpasand Beverages is in the process of finalising the location for the fourth plant in eastern India.

Speaking about this latest development, Dharendra Singh, Chairman & MD of Manpasand Beverages, said, “The fruit juice market across India has a huge potential for growth and is still considerably untapped. To take advantage of this huge demand, we have embarked on an aggressive expansion journey to more than double our production capacity within the next two years. To meet the demand for our existing brands Mango Sip and Fruits Up and to introduce more new brands in futures, we are setting up four new manufacturing units to cover the key markets of India. With the Rs. 500 crore raised through a QIP issue recently, we are well placed to fully fund these four new plants.”

Elaborating on the selection of the sites for the plants, he said, “Manpasand has a strong reach in the semi-urban markets of northern and western parts of India, and with the proposed plants our aim is to tap markets in the south, east and north-eastern parts of India too in future. As a proud Indian Company, we believe in ‘Make in India’ and through these plants we are just reiterating our commitment to this initiative of the government.”

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INDIA FOOD FORUM 2017 CONCLUDES ON A HIGH NOTE



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President & CEO, Walmart India



Arvind Varchaswi
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The 10th edition of India's largest food intelligence event – India Food Forum – concluded on a successful note after a whirlwind and power-packed three-day convention marked by a glittering array of conferences, workshops, round-tables, exhibition and awards. The annual mega congregation and power summit of India's Food Retail industry wrapped up at the BKC in Mumbai on 2nd of February after showcasing a rich bouquet of takeaways that promise to keep the participants connected with the next big consumption trends and innovations in food retailing, HoReCa and food technology, and ensuring that they are empowered with the products and insights to maximise the opportunities offered by India's vast consumer universe.

Over the past decade, India Food Forum has gathered key decision makers from every part of the food supply chain to push for best-practices in food and grocery retail and foodservice sectors in India. Every year, thousands of exhibitors, delegates and visitors from India and around the world have collaborated to create new business opportunities for not just domestic food brands, but also scores of foreign food and FMCG businesses.

The Forum this year was powered by **Sri Sri Products** and inaugurated by **Krish Iyer**, Chairman, India Food Forum and President & CEO, **Walmart India**. "As an economy with a strong agricultural base, India is blessed with immense natural resources, which if harnessed in a responsible and far-reaching manner, have the potential to propel us to sustainable economic growth for next few decades. Our honourable Prime Minister Shri Narendra Modi has already spelt out his dream of a strong, self-reliant nation through his visionary 'Make in India' campaign. As businesses, directly or indirectly connected to the food business, we should now take it upon ourselves to imbibe global best practices, innovation and bold initiatives to become a world-class food retail economy," said Iyer.

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A panel of industry experts, including Krish Iyer, Arvind Varchasvi (Trustee, Sri Sri Ayurveda Trust and Group Advisor – International Affairs, AYUSH Advisory Group), Devendra Chawla (Group President, Food & FMCG Brands, Future Group), Henrik Osterstrom (Country Food Manager, Ikea India), Saugata Gupta (MD & CEO, Marico), Jamshed Daboo, CEO, Trent Hypermarkets and Nandan Reddy, Co-founder, Swiggy.com spoke at the Inaugural Session on ‘how innovation is leading to growth and potential for food market and how the current trends are shaping the 10 growth areas of tomorrow’.

As in the past, the Forum this year hosted international pavilions of various foreign trade bodies and countries, including those from the USA, UK, UAE among others, besides being the arena for the involvement of leading food brands and engaging retail concepts. For instance, the UK’s Department for International Trade brought in a strong delegation of UK food and drink companies – 17 iconic and high-

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quality British brands – to network with Indian businesses and explore partnership opportunities. In all, the Forum this year welcomed **200 exhibitors, 700 brands, 9000 visitors, 200 speakers and 150-plus international visitors.** “India Food Forum is the strongest interaction platform amongst Supermarket walas and their brand partners. It is a great platform for exchanging strategy notes and points of view with the industry leaders and interacting with them,” said **Damodar Mall, CEO, Grocery Retail, Reliance Retail.**

Thanking the delegates and the participants for the resounding success of the 10th edition of the Forum, **Amitabh Taneja, Convenor of India Food Forum and CMD, IMAGES Group,** which also publishes Progressive Grocer and a clutch of other retail-centric magazines, said: “India Food Forum 2017 endorses India’s status as possibly the world’s most exciting marketplace, and it continues to empower the industry with rich insights, innovation and market-ahead ideas that can enable sustainable and profitable growth.”





Much Food for Thought

By **Ritusmita Biswas**

The inaugural day of India Food Forum 2017 was high on many high-voltage panel discussions. ‘The Food CEOs Megapolis – What makes the food business the most exciting business to be in, and why the food leaders feel upbeat that the best is yet to come’ was once such conference that attracted leading luminaries from the universe of food & grocery branding and retail. The panelists deliberated on the current market scenario in light of some important industry metrics, viz:

- Food and grocery constitutes the largest consumption category in retail in India
- The segment contributes 57% of the total Indian retail value
- The sector is poised to grow 3.5 times by 2025
- Its value would be worth INR 71,000 billion by 2025
- Demonetisation will drive shift to modern formats

Taking into consideration the above-mentioned premises, the panelists set out to offer the blueprint of this growing industry from their individual perspectives – their opinion about the future, and the big disruptions that is happening or is yet to happen and how it will shape the contours of the industry. The discussion was moderated by **Sadashiv Nayak, CEO, Big Bazaar**, and **Ankur Shiv Bhandari, MD, Asbicon Group**.

Deepak Vohra (IFS), Special Advisor to the Prime Minister, **Lesotho and Guinea-Bissau** opened the session with a very humorous approach. According to him, it was food for which battles were fought and empires established and thanks to the ‘Coca-Colanisation’ (read globalisation), a massive change has been observed in the food tastes of Indians. “When India got its freedom, and as per the first official figures we had from 1950, the disposable income for non food and luxury food were 10%; today it is 50% across the world. So there is a great demand for food products. The biggest disruption we have seen is ‘youthification’ of taste and the willingness to spend money. And I believe, luxury food is the biggest disruption. No one wants to eat just ‘dal-roti’ today,” he said.

According to **Damodar Mall, CEO - Grocery Retail, Reliance Retail**: “The biggest change or news that I have seen is that the fortress in our home that existed around ‘ghar ka khana’ or homemade food is brick by brick opening up for business. That really multiplies the business opportunity that all of us have as branded products



“

“The biggest disruption we have seen is ‘youthification’ of taste and the willingness to spend money”

— **Deepak Vohra (IFS)**
Special Advisor to the Prime Minister, Lesotho and Guinea-Bissau



“

“Today, soaked chole, batter for dosas, chutneys and parathas are available in retail stores and gaining popularity. That really multiplies the business opportunity for all of us”

— **Damodar Mall**
CEO, Grocery Retail, Reliance Retail



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A Mahendran
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and service providers.” Today, soaked chole, batter for dosas, chutneys and parathas are available in retail stores and gaining popularity. Mall was optimistic that in 5-10 years, this steady change will be embraced by every home-maker.

Ajay Gupta, MD, Capital Foods, agreed with Damodar Mall, when he was asked about his opinion. “A housewife has to answer one question, five times a day, seven days a week for 365 days, ‘Aaj khane me kya hai?’. So I do feel there is a revolution brewing on in our kitchen. Over the last few years we have grown up with a lot of exposure to the media. Then came the malls with their food courts and these have catalysed a huge amount of experiments. The housewife and her family is hungry and if we do not innovate or bring newer products to table it is not going to work. Basically, I believe that we are ready to see a huge change that is going to happen in processed food,” he noted.

However, **K. Radhakrishnan**, co-founder, **Grocermax**, presented a very different opinion. For him, nothing has changed. “In the late 90s, when I was involved in the opening of a locality supermarket, the staples used to be 25% of the total sales; today it is the same. There is absolutely nothing that has disrupted in food. For me disruption in food is when fresh food disrupts. A person who tried to launch a ready-to-eat food brand had to struggle in India, but is now flourishing in the US. He opined that he is happy that the habit of Indians is not changing. “The problem is that the

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“The housewife and her family are hungry and if we do not innovate or bring newer products to the table, it is not going to work”

— **Ajay Gupta**
MD, Capital Foods

centre of the plate of the consumer’s home is dal, rice and roti, and there is no major player value adding to this space; everybody is on the periphery of the plate. There is pickle, there is jam, there are sauces and soup but that is not the centre of the plate, which is 70% of the value of the food that we eat.”

Ramesh Menon, CEO, **Hypercity Retail** agreed with Radhakrishnan. “The multinationals have done a disservice to the industry by not innovating enough for the last 20-30 years. The change in the last few years is the arrival of the Indian startup food entrepreneurs. And I feel all the change that has happened to the Indian palate or the dining table at home has been made by these new entrepreneurs.”

But for **Unnat Varma**, MD, **Pizza Hut** (India Subcontinent), **Yum! Restaurants**, there have been two major disruptions in the food industry and the effect has been more on food service. The first one is the emergence of the food delivery specialist and multiple local players offering international cuisine at affordable price. “The number of casual diners has remained static and has not been growing. In fact, this number was gradually seen declining until some time ago, but has increased remarkably of late, thanks to a major disruption – food delivery – in the food sector.”

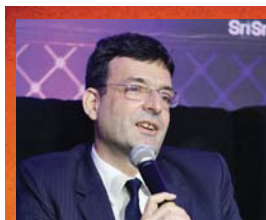
A Mahendran, CMD, **Global Consumer Products** and formerly, MD, **Godrej Consumer Products**, however brought in a new perspective to the discussion. “When you look at food & beverage as 60% of FMCG, and when you look at the investment in this sector in the past 10 years, the investment or capitalisation behind them is very poor and low in India. So when you talk about 75 thousand billion rupees of investment in 2025, where is the investment going to come from? Government approvals and FDI do not allow international players to enter the Indian food industry. But if there is no drastic change or investment in the industry, this investment number is not possible. But I would agree that the consumption or the demand is raging but there is no back-up, supply or innovation. There is no fund to promote innovation.”

Vikram Kamat, MD, **VITS hotels & Kamats Restaurants**, on the other hand, had a very optimistic opinion about the issue. He preferred to look at the big picture. According to Kamat, even though the industry might not have seen a big disruption in the retail segment, when it comes to casual diners and experimental food, there has been a major change. “Consumers today love to try new and experimental food. I think that this change of trying something new, do something exotic and that mindset of willing to experiment in itself is a very big change and hopefully that will continue and will allow many more categories eventually.”

Sukanto Aich, Senior Director, **Philips Lighting**, said that even though he did not belong to the food sector, he could not but help notice that food is one

segment that “people are not comfortable buying online and would like to come and touch and feel the products out there”. He said that even though he was not very sure if there had been a big boom in food industry but he was hopeful that there might be a big disruption waiting in the future.

Piruz Khambatta, CMD, **Rasna & Chairman, CII National Committee on Food Processing & Ambassador**, was quite confident talking about disruption in the industry. “In our company, we don’t wait for disruption to happen; we make it happen. I think the best thing to do is to have the insight of the consumer and at right time you need to make the right product.” He suggested all to be prepared because big things are set to happen with the potential of e-commerce being unleashed fully.



Piruz Khambatta
CMD, Rasna & Chairman, CII National Committee on Food Processing & Ambassador



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Sadashiv Nayak
CEO, Big Bazaar

The conclusion to the panel discussion was drawn by **Sadashiv Nayak**, CEO, **Big Bazaar**. “While some believe there has been no major disruption in the food sector, there are high chances of a massive breakthrough, thanks to the millennial customers who see food as an experience and a symbol of their social strata. Others believe that cooking will eventually become a celebration; a way to connect with your family emotionally and eating out will become an everyday common affair. But again, even though the millennials will order party food from outside, they will crave for that ‘Ma ke hath ki’ dal, roti, rice. And some imaginative CEO or company will definitely come up with a way to serve that. The session, which was compered by **Ankur Shiv Bhandari**, MD, **Asbicon Group**, ended on an optimistic note with his observation that players in the food industry have a lot of potential opportunities to look foward to and the industry is poised for more exciting times ahead.



“The problem is that the centre of the plate is dal, rice and roti, and there is no major player value adding to this space; everybody is on the periphery of the plate”

— **K. Radhakrishnan**
Co-Founder, Grocermax



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Sri Sri Ayurveda to launch new products and expand to 2500 retail outlets this year

After garnering a very positive market response to its recently launched herbal health drink Ojasvita, the company is gearing up for the launch of its cooking masalas and many new organic food products.

By Charu Lamba



Arvind Varchaswi
Trustee on the Board
Sri Sri Ayurveda Trust

Sri Sri Ayurveda (SSA), the FMCG arm that supports the social initiatives under the Art Of Living founded by the Spiritual leader Sri Sri Ravi Shankar, is all set to take the food and grocery industry by storm with the introduction of spices and organic staples in the Indian market. Sri Sri Ayurveda, which entered the FMCG space in 2003, focuses on ayurvedic consumables across categories such as health drinks, ghee, oil, spices, personal care, oral care, cookies, ready-to-cook items and staples. Currently, SSA has 360 SKUs on offer in the market, ranging from shampoos, creams, toothpaste, soaps to honey and ghee, among others. “Our product range is going to increase, especially in the FMCG sector and also the commodity sector,” Trustee on the Board, Sri Sri Ayurveda Trust, Arvind Varchaswi told Progressive Grocer, in an exclusive interview at India Food Forum 2017.

Elaborating on this, Chief Marketing Officer, Sri Sri Ayurveda, Tej Katpitia said, “This year, we will be majorly focusing on Ojasvita - our health drink with seven power herbs.” He added that malt and chocolate flavours





are getting the best consumer feedback and volume play currently. Talking of SSA's product development plans, he said: "Apart from our focus on Ojasvita, we will also be expanding our food segment. We will be launching our spices and cooking masalas this month. We have quite a healthy range of around 13 products lined up and along with this we will also be getting into organic staples like organic moong dal, split dal, chana dal and toor dal, to name a few." The brand is also looking to introduce more specialty products like brown sugar and whole wheat atta.

Expansion plans

The Bengaluru-based company, which recently launched its health drink brand Ojasvita, endorsed by Olympic silver medalist P.V. Sindhu and National badminton coach Pullela Gopichand, is currently selling products through 1600 franchised stores but plans to expand to 2,500 outlets in India in 2017. Besides, SSA already has an online presence and sells products through its websites. SSA's online portal srisriproducts.in. also offers wellness and personal care products, and food among other things.

"SSA typically is expanding both through the general retail and regular distribution channels. We have franchise stores across the country. Given the growing demand for our products and the positive response we are getting from the market, we are going to focus on general trade, modern trade, e-commerce and franchise stores for expansion," revealed Katpitia.

Global Presence

The company, which has three factories at present, is already a global brand. Apart from India, its products are being retailed in countries such as Argentina, Australia, Canada, Columbia, Europe, Iraq, Japan, Kenya, Malaysia, Mauritius, Mexico, Nepal, Nigeria, Oman, Peru, Singapore, South Africa, Sri Lanka, Taiwan, UK & USA.

"We already export our products to several countries across the globe. We are looking to scale up our presence and soon we will be launching our products in Russia," said Katpitia.

Sri Sri Products

Sri Sri Products (formerly Sri Sri Ayurveda) has been established by committed individuals with nearly four decades of experience. With a 360-degree approach, including a College of Ayurvedic Science and Research, a state-of-the-art hospital, inspired doctors and therapists, panchakarma wellness centers, spas and clinics, manufacturing facilities driven by technology and stringent control systems and a widely growing franchise and retail presence, the brand has a holistic approach to health and wellness.

Modern lifestyles call for any offering to be user friendly, and in that, Sri Sri Products ensures maximum touch points across the nation, be it by way of highly experienced Ayurveda Vaidyacharyas, health and pulse diagnosis (Nadi Pariksha) camps, ailment specific as well as rejuvenating treatments at its multiple centres.



“Given the growing demand for our products, we are going to focus on general trade, modern trade, e-commerce and franchise stores for expansion

— Tej Katpitia
Chief Marketing Officer, Sri Sri Ayurveda

Win-win partnerships between brands and retailers

By Premjit Mohapatra

The evolution of modern trade has thrown up new challenges for FMCG and food majors. Brands love the space, the visibility and all the benefits that modern trade offers. They have allocated resources towards this new order through dedicated supply chain management, in-store execution, category innovation, and joint business planning with retailers. Still, they are often confronted with issues like margins, space, supplies, promotions, etc.

Considering the massive inflow of new products into the market, retail shelf space allocation is as huge a challenge for retailers as it is for new/ innovative products to get on grocery store shelves.

To tide over such challenges, it is important for brands and retailers to work together as partners. India Food Forum 2017 had a dedicated session – Mega Conclave: Driving Retail Shelves to Higher Profitability – that showcased exemplary cases of collaboration between brands and retailers. The session highlighted some success stories that embody valuable lessons for the F&G industry. Progressive Grocer brings to its readers the instances of mutually beneficial partnerships that won plaudits and won ringing endorsements from industry mavens at India Food Forum 2017.

CASE STUDY 1

RAW Pressery and HyperCITY: Driving growth and profitability through innovation & collaborative best practices

The successful collaboration between RAW Pressery, a cold pressed juice start up, and HyperCITY, illustrates how this partnership is driving category expansion and profitability through premium innovation. The partnership started on a small scale in 2015 and has since blazed an envious success story.

Thanks to this partnership, the juice that was once dismissed as a perfect recipe for failure by a retailer has scripted a shining success story. RAW Pressery today is the leader in the juice segment in HyperCITY. The category has grown by 29%, profitability of the category has gone beyond 5% and bill penetration in the category has grown by 11%. “This wouldn’t have been possible but for the close partnership and relationship we share with HyperCITY,” said **Sreejit Nair**, Director – Sales, RAW Pressery. The consumer being the focal point of all activity, understanding the consumer and assessing the change in consumer trends is critical, which is what HyperCITY kept in mind when it picked up on RAW Pressery.



Left to Right: Y.V Rao, AVP Merchandising, Hypercity | Sreejit Nair, Director Sales, RAW Pressery | Vallabh Soudagar, Business Head, FMCG, Reliance Retail | Aditya Pittie, MD Pittie Group | Arunabh Das, Head Merchandising, FMCG, Easy Day Kabir Gossain, Head of Key Accounts & Customer development Mordern trade | Ganesh Mishra, Head Commercial, Trent Hyper Market Ltd | Brett Mclean, Head of Mordern trade, Mondelez India | Rajiv Sharma, Business Chief Staples, Future Retail | Shyam Iyengar, Head Supply Chain Management, Patanjali | K. Ravindra Nath, Head Buying & Merchandising (Fruits & Vegetables), Heritage Fresh | Ritesh Bhimani, Country Head, Zespri International | Arun Khattar, CEO, Needs Supermarket | Satish SV, AVP Buying Merchandising (Foods) SPar India | Deepak Bhatnagar, Sales & Marketing Sula Vineyards



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“At HyperCITY, we believe in examining, before launching a category or product, whether it is adding value to our business and if it is addressing the needs of the consumer and also if it is adding any value to the entire proposition of business. When observing the consumer trends for healthier options, we thought why not we capture a new innovative product, something like cold pressed juices. That’s the best way to put a product on the platform and grow the category,” said **Y.V. Rao**, AVP - Merchandising, **HyperCITY Retail**.

Rationale behind partnership: Customer profile

“We believe in supporting start-up entrepreneurs and one of our founding philosophies is that a start up entrepreneur should get a space in the store to showcase their brands. RAW Pressery is one of the brands, among others, that started with HyperCity and have taken off. Our support for RAW is rooted in the realisation that both of us are looking at customers with a similar profile. Our consumers are modern, experience seeking, cosmopolitan, aware and looking for innovation when it comes to food. They look for new things in the store, which plays to our core positioning – something fresh everyday for our consumers. Innovation plays an important role and we are happy that brands like RAW provide that innovation and experience in the store. And that is the fundamental reason why we support brands like RAW,” said **Ramesh Menon**, CEO, **HyperCITY Retail**, elaborating on the chain’s successful engagement with RAW Pressery.

The challenge: Creating consumer interest

RAW products are manufactured with high-pressure cold processing, without involvement of heating. They are 100% fresh and pure and retain all natural nutritional value and taste. The product has a shelf life of 21 days and it is free of chemicals or preservatives used for extending the shelf-life. The product is priced three to four times than the regular Tetra Pak cartons available in the market. It has to be maintained between 0-8 degrees at all times and there is clear sedimentation in the packaging. “Considering its features, incubating a brand like RAW Pressery wasn’t going to be easy,” said Nair.

“By creating awareness, generating and sustaining interest, inducing trials and finally leading to conversions, we were able to address the issue of turning shoppers into buyers,” continued Nair. Extensive branding, that too disruptive branding, in the category was used to create awareness and consumer interest. “As for trial, we did extensive sampling, which helped identify and address some of the shopper barriers, and led to conversions. It was enough to convince the customers that the premium pricing that they were paying was worth it,” noted Nair.

Brilliant execution and making the product available on the floor and merchandising them with the perfect norm have been the strength of RAW. The product has created a new base with customers thanks to its interaction and energy levels. To disrupt, RAW focussed on being relevant at the point of sale. “Most retailers have space constraints and understandably so, but HyperCITY has been very flexible. They allowed us space during the weekends to do pop up sampling and, importantly, extensive branding, and this deserves appreciation,” added Nair.



RAW Pressery believes that more growth will come through innovation and it will be upward of 50% of its current numbers. “We have hardly seen any failure of our innovation approach in the last six months and we intend to use all the pillars of revenue management. The icing on the cake would be if we increase the bill penetration and profitability of the category between 5% and 10% next year,” hoped Nair, while stating his plans and objectives for the future.

Stressing on the criticality of innovation, Menon said, “The most important thing about this is that it adds to category profitability and category revenue. The product has actually grown in the category and made the category more profitable for us. That’s the beauty of the entire strategy, that’s the beauty of innovation. Innovations bring in higher margins and they get the product a higher share of the category. This benefits the brand, the retailer, the consumers and the bottom line of partners. That is our strategy forward.”

Kedar Lele, VP - eCommerce, Modern Trade & Inst. (CSD/CPC) Business – **HUL**, who was one of the moderators at the session, said the partnership between HyperCITY and RAW Pressery is a great example of building a brand in a store. “HyperCITY gave RAW space, disruptive visibility and allowed it to create interesting experiences for the consumers; all this helped build a brand inside a store,” he noted.

RAW Pressery today has presence in 900 PoS across nine cities and is poised to grow further in the days ahead.



“Our growth wouldn’t have been possible but for the close partnership and relationship we share with HyperCITY”

— **Sreejit Nair**
Director – Sales,
RAW Pressery



“Innovation plays an important role and we are happy that brands like RAW Pressery provide that innovation and experience in the store. That is the fundamental reason why we support brands like RAW”

— **Ramesh Menon**
CEO, HyperCITY Retail



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CASE STUDY 2

Patanjali, Pittie & Reliance-Embracing the entrepreneurial spirit

Patanjali today is the fastest growing FMCG company in India and Pittie Group holds the exclusive rights for modern trade, HoReCa, and also the exclusive GTMT rights for Astha Puja category for Patanjali. Pittie is also the fastest growing FMCG distributor in India.

In Oct 2013, Patanjali decided to pursue modern trade and Reliance became its first partner. “The spirit of this relationship with Reliance was very entrepreneurial, in which science took a back seat,” said **Aditya Pittie, MD - Pittie Group**. The entrepreneurial journey between Reliance and Patanjali took off with a five-store pilot project in Mumbai, which involved building separate FSUs for Patanjali without disrupting the space allocated to the other brands. The stores were also given the opportunity to decide the assortments, including the option of changing them when deemed necessary. “The aim was to demonstrate how Patanjali as a brand could generate the best RGM for a store and within two months we were vindicated when the FSU for Patanjali had the highest RGM of the five stores,” added Pittie.

Important takeaway: If there is a brand that shows potential, has conviction, and exudes confidence and commitment, bet on it early. The costs of doing a pilot are less than going for doing any research, and negotiations and debate and pilots also provide considerable empirical evidence.

“Our conviction in Patanjali went up manifold when we learnt first hand about their professional set up, supply chains and R&D, which was at par with any MNC set-up in the country. A closer look at the customer data, transactional analytics, and source of share gain revealed that betting on this brand assured net growth with absolutely no cannibalization. But the clincher was the high customer loyalty for the products at almost 80%,” said **Vallabh Soudagar, Business Head - FMCG, Reliance Retail**.

Lesson: If your conviction is tested and proven right, scale up rapidly.

The next phase of the journey saw Reliance slaughter a few holy cows of category management. This involved taking many measures – providing a ‘green channel’ for all Patanjali products, Patanjali FSUs as a destination for Patanjali products in the store, then the ‘Funnel Approach’ – moving established products from the Patanjali FSUs to the primary bay to make space for new introductions.

“Taking these steps were necessary because Patanjali was launching new products and categories at a breathtaking pace and Reliance stores with space constraints couldn’t accommodate the SKUs and products without giving the traditional norm of category management a go by. The only thought was customer first and it worked great,” explained Soudagar.

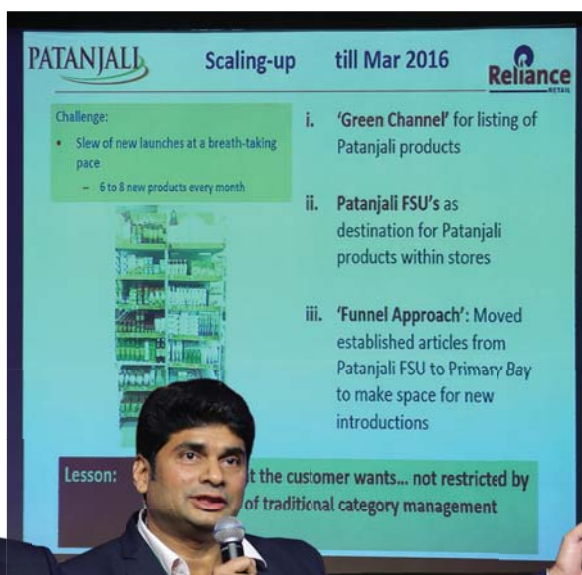
The next stage was how to get the distribution and logistics right. “By adopting the hybrid model of DSD for stores in cities and DC for upcountry locations pan-India, stores were assured of the presence of Patanjali products,” explained Pittie.

Lesson: At every stage of scale, redefine the supply chain model and move ahead.

Reliance Smart stores today have dedicated Patanjali sections and they have managed to create an abundance of display for certain categories and products. “Now we have moved to a science-based replenishment model because once you decide to scale, that model works,” said Soudagar.

The message is loud and clear: Start entrepreneurially, scale rapidly and then move towards a science-based model for replenishment.

Aditya Pittie
MD, Pittie Group
and
Vallabh Soudagar
Business Head
FMCG
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CASE STUDY 3**Heritage Fresh and Zespri International**

The collaboration helped make a runaway success of an unknown kiwi fruit; sales rocketed from Rs. 33 lakh to Rs. 2 crore in a year and overall category weightage for the fruit has grown to 4.5% from .05% some years ago.

Kiwi, an exotic fruit from New Zealand, was never considered a main fruit, even in the fruits category. "I had never considered the fruit in the category," said **K. Ravindranath**, Head - Buying & Merchandising (Fruits & Vegetables), **Heritage Fresh**, which has 130 supermarkets and a turnover of INR 650 crore, with fruits and vegetables contributing 15-20% revenue.

The upward trend in the sales of kiwi began from 2012 and sales received a major demand boost in 2015-16. One reason for it was because of the health

Heritage and Zespri collaborated and undertook several joint management activities such as:

- 1) Revamp the product promotion and display to generate trial. Reason: The penetration of kiwi fruit stood low at .05% -.1% and this step was taken to revamp penetration.
- 2) Revamp penetration by giving attractive freebies. This was expected to increase penetration.
- 3) Put up special product displays and special FSUs.
- 4) Put up point of sale material.
- 5) Incentives were given to store associates.
- 6) Cross promotions were done.
- 7) Deployment of exclusive promoters to vet and sample kiwi fruits in the top 30 stores out of the 130 stores for the first few months.

Other than the above measures, a bold decision was taken to start selling kiwis loose without the attractive packaging. Targets were set at the start of the promotion activities in partnership with Zespri. "Zespri also committed to give us a constant price throughout the season without any fluctuations so that we could build a category and give a constant price to the customer," said Ravindranath.

A joint ATL and BTL campaign, besides a customer awareness campaign, was also conducted. Centrespread news on TOI for customer awareness in Hyderabad, Chennai and Bengaluru received phenomenal responses. "We totally revamped the display of kiwi inside the store and cross promotions with biscuits was also launched," said Ravindranath.

Results at the end of an extended five month campaign

In August 2016, the number of kiwi fruits sold were a million, while the number was only 90,000 for August 2015. And for the same period, sales zoomed to Rs. 2 crore from Rs. 33 lakh earlier.

Key success factors: Good promotion; Consumer price point of Rs. 20; Health benefits; Better and focussed display; Operation focus; Sticking to Zespri brand which is known for quality; Consistent supply from distributor.

"This year, our kiwi sales have outsold oranges and grapes. Going forward, we can do substantially better. From 1.5% of the fruit category, we are currently at 4.5%, and next year we expect we can do something like 8%," said Ravindranath.

**K. Ravindranath**

Head, Buying & Merchandising (Fruits & Vegetables), Heritage Fresh

Ritesh Bhimani

Country Head, Zespri International

benefits and its perceived immunity building and improved digestion properties, attributes all too accentuated in times of a viral scare. Kiwi is the only fruit that has more than 30 nutrients in a single fruit. It is a rich source of vitamin C and dietary fibre. It is a natural source of foliate and very good for expecting mothers. Rich in antioxidants and with a low glycemic index, it is good for diabetics. Educating the customers on the health benefits of the kiwi fruit yielded better sales.

"In Heritage Fresh, we started promoting kiwi in 2016 after noticing that its sales was catching momentum. So we decided to focus on it and partner with Zespri for a joint activity and observe the results," said Ravindranath.

Zespri International is a cooperative company based out of New Zealand and owned by 3,000 growers. "Zespri is more of a marketing arm for growers and we are the only exporters out of New Zealand and supply the best quality kiwi fruits to 53 countries across the globe," said **Ritesh Bhimani**, Country Head, **Zespri International**.



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- Harshita Gandhi
- Saptarshi Lahiry
- Neelima Burra
- Krishna Rao
- Rao Sahib SR
- Saurabh Saith
- Gaurav Sharma
- Devendra Chawla
- Damodar Mall
- Kedar Lele
- Sunil Sanklecha
- Arun Khattar
- Ponnu Subramaniam
- Uday Verma
- Kuldeep Goyal
- Ajay Thakur
- Madhumita Mohanty

Like two peas in a pod

By Premjit Mohapatra



The session “How Together We Deliver More to the Customer” on Day II of India Food Forum was an attempt at learning – for both retailers and brands – about how to evolve a mutually beneficial understanding and forge a consensus on delivering the best to customers.

Members on both sides agreed that with the feasibility of MT no more in question and its contribution to overall trade showing positive trends, only a joint collaborative effort between retailers and brands can sustain the momentum. Brands/FMCGs generally agreed to the retailers’ perspective on the need for extending better margins, product liquidation (unsold/ expired), regular servicing and replenishments by the sales staff, timely delivery of the orders and a well defined credit period policy. Retailers, on the other hand, were broadly in agreement with the expectations of brands: that they should be loyal to the brand, partner with the brands, give their products ample shelf space and propagate the brand message to end consumers.

Retailers need to ensure that products are available at the right time, through the right channel and at the right price. However, despite the attempts at collaboration, there exist several points of friction between retailers and brands, some of which were flagged during the session.

Launch and forget - that’s how brands operate. Eight out of ten launches are unsuccessful: Firing the first salvo, **Uday Varma, Commercial & Marketing Director, Trent Hypermarket (Star Bazaar)**, said, “Traditionally once the listing and PO has been done and the products are on the shelves, brands wash their hands off it. And that’s probably one of the biggest grouses a retailer has. Eight out of 10 FMCG launches are not successful. There needs to be greater accountability because we are stuck with the products and there are issues of liquidation.”

Echoing the sentiments, **Kuldeep Goyal, VP - Merchandising (Foods), Spencer’s** said: “Brands need to partner with us in the clearing of inventories post an unsuccessful launch.”

Convince us so that we can do more for customers: “It is for brands to make us understand and convince us to put more products on the shelves. The responsibility for developing a category and for convincing the retailer to put more products on the shelves rests with the brands. Our life can continue by growing the top line even if you don’t introduce any new brands,” asserted **Ponnu Subramaniam, Chief Operating Officer, SPAR India**.

Brands are increasing the complexity by differentiated promotion. Need for rationalization: “There is competition created by brands by way of differentiation of promotion when it comes to online retailers and offline retailers. There needs to be some correction there,” said **Arun Khattar, CEO, Needs Supermarket**. Expanding and elaborating on the issue of differentiation of pricing and promotions, **Gaurav Sharma, Director Sales, Kelloggs**, said: “We, as brands, realise that a lot many customers are walking into your store for what you offer to them, and which is not only about the price on the shelf but about many other things. We are here to promote healthy competition, and so let the promotions be different across different retailers.”

Lack of listing in Tier II and III cities: “The biggest challenge is the supply chain and connectivity in tier II & III cities. There is no discernible presence of brands in upcountry locations. For example, there is limited play for frozen products in such locations. You will hardly find a distributor for



What goes wrong is that many times we don’t involve the retailer early enough. When launches and innovations take place, many a times retailers don’t come to the party.

— **Kedar Lele**
VP - eCommerce,
Modern Trade & Inst.
(CSD/CPC) Business
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frozen in Vijaywada, Vizag or Hoogly. As a retailer, I am providing the frozen supply chain plus the stores to expand your reach. While there is talk of more representation of global portfolios of MNCs, expanding the reach of the existing brands is equally important,” stressed **Ajay Thakur, Head, Buying & Merchandising, Aditya Birla Retail (More).**

Low-fill rates in MT are a big concern:

Madhumita Mohanty, Head Merchandising, Health & Glow, urged FMCG companies to improve their fill rates and focus on the need to establish a mechanism to increase fill rates. “Whatever maybe our points of disagreement, if fill rates are not good and there are no products on the shelves, we are helping nobody. I mean all of us end up as losers. We need to partner in this. Secondly, when there are a lot of launches, some work and some don’t work; so what happens to the rationalization. Why should the onus be only on the retailers? All FMCGs go up in arms when we remove some stocks because space is limited,” she said.

Taking note of the comments made by his retail peers, **Devendra Chawla, Group President - Food & FMCG Brands, Future Group, and CEO, Future Consumer Limited,** observed: “In India, the number of SKUs per store in a supermarket is one of the least in the world. If you make a compelling product like Patanjali, the space automatically opens up. There is no challenge for space. If a retailer sees market development and knows that customers will come to buy products, he will open his arms.”

Brand representatives at the panel acknowledged that modern trade offers a range of products, extensive shelf display and evaluation power to the consumer. “It’s the showcase, the retail space where every brand manager wants the products displayed. But the biggest derailer is the listing, the negotiation, the cost at which you enter into it, thereafter the responsibility to move it and with that the promotions, the supports that goes with it and thereafter the responsibility to further liquidate it because the store is blocked. Considering these factors, all that is required is a symbiotic relationship,” said **Neelima Burra, Chief Marketing Officer & Business Head - Organised Retail & Olive Oil, Cargill.** There is a greater need to seek out collaboration based on trust and not act out of self interest alone.

Endorsing Burra’s views, **Saptarshi Lahiry, Head, Modern Trade, Institutional & E-commerce, Abbott-Nutrition International,** said, “The only support we require from retailers is that they shouldn’t always talk about ‘what’s in it for me’. MT gives us an opportunity to create the experience of a brand inside your store. Give us that opportunity of creating our brand inside your stores.”

Harshita Gandhi, Director, Tree of Life, wished that the retailers wouldn’t dismiss the experience of General Trade or online trade. “As far as finding



“**Eight out of 10 FMCG launches are not successful. There needs to be greater accountability because we are stuck with the products and there are issues of liquidation”**

— **Uday Varma**
Commercial & Marketing Director, Trent Hypermarket (Star Bazaar)



“**The responsibility for developing a category and for convincing the retailer to put more products on their shelves rests with the brands”**

— **Ponnu Subramanian**
Chief Operating Officer, Spar India



Gaurav Sharma
Director Sales, Kellogg’s

Arun Khattar
CEO, Needs Supermarket

space on the shelves is concerned, the product must speak for itself,” she said.

There was a convergence of views between retailers and brands on the need to fix mutually inefficiencies in supply chains, on bringing innovations in supply chain strategies, redesigning distribution and transportation strategies, for ensuring assortments down the order to upcountry locations and for brands taking more responsibility to create brand awareness for any new launches. Low fill rates and listings remained a concern. The retailer and the brand both need to see it as a true partnership and understand each other for a successful partnership to emerge. As both are vying for the same consumer attention, the motive should be to increase customer satisfaction by increasing the availability of products.

“We both are on the same side and want the same thing – the consumer. We need to work together to get higher growth rates in MT, launch new products, and strengthen category development. All premium products come to MT first and then go to GT as the market develops. MT in retail is itself very small and the number of premium brands is again very small,” said Chawla. While the premiumization journey has also been slow, category growth and segmentation too have some way to go, which should compel a watchful approach from brands. “We are agnostic as to what sells but, of course, it does matter if premiums brands sell more because then the margins are more and that’s good for the profitability of the retailer,” said **Damodar Mall, CEO, Grocery Retail, Reliance Retail.**

Wrapping up the discussion, **Kedar Lele, VP – E-commerce, Modern Trade & Inst. (CSD/ CPC) Business – HUL,** said: “For brands, retail is the theatre and the launch of an innovation is the celebration of that theatre. What goes wrong is that many times we don’t involve the retailer early enough. Sometimes when launches and innovations take place, many a times retailers don’t come to the party. With every launch comes variable spends, which is the vitamin that goes to the retailer.” That’s a timely reminder for both retailers and brands to forge a more symbiotic relationship in order to break out onto the path of profitability and customer satisfaction.



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The opportunity in digitalization

With increasing numbers of consumers moving toward the digitalized spectrum of the industry, the food retail sector has a never-before opportunity to become better structured, more efficient, streamlined and a lot more transparent.

By **Ritusmita Biswas**

The opportunity in the digitalization drive on hospitality and retail trade” was an apt session on Day II of India Food Forum 2017 to discuss the effects of demonetization on different segments of India’s food retail sector over the short, medium and long term and the potential of this unprecedented move to benefit many sections of the industry.

Panelists at the session were: Avinash Tripathi, Category Head, Godrej Nature’s Basket; Bharandharan Ramaswamy, Director Procurements, Marriott’s Hotel India; Chef Rakhee Vaswani, Palate Culinary Studio Mumbai; Rakesh Banga, Farmland; Nitin Nagrale, Founder & Gen Secretary, Hospitality Purchasing Managers Forum (HPMF) and Vice President - Materials Management, Foodlink Restaurants India. The session was moderated by Amit Lohani, MD, Max Foods and Convener, Forum of Indian Food Importers (FIFI).

Kicking off the session, **Amit Lohani said:** “Demonetization disrupted our buying pattern in a big way. We have a panel here that comprises representatives from different strata of the food sector and who will tell us how they were impacted.”

Avinash Tripathi, Category Head, Godrej Nature’s Basket was of the view that digitalization has helped modern grocery chains in terms of providing an overall retail perspective for a bigger business opportunity. “So if you look at our store, we have seen 20% same stock growth during the initial stages of demonetization and sales are now stable. We are at 13 to 14% of same stock growth, which is much higher than what we had before demonetization. Thus demonetization and the consequent push toward digitalization have impacted us big time and on the positive side. The categories that have done really well are those in the fresh segment like fresh vegetable and delicatessen. The only area where we have seen a



Left to right:
 Avinash Tripathi
 Bharandharan Ramaswamy
 Chef Rakhee Vaswani
 Amit Lohani
 Sanjay Tandon
 Rakesh Banga
 Nitin Nagrale



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The publication combines international concepts with indigenous expertise to offer food for thought for the top executives and decision makers of the Indian foodservice business.



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slowdown in our business is the cash and carry sector where most retails are dependent on small traders. That is the only area in the organized sector that has been impacted. We have seen some slowdown in the impulse categories like biscuits, confectioneries, and snacking. Gifting is also one of the areas that were impacted in the month of December, which is normally our best month for this category. We have seen a reduction of around 50% in gifting during that phase. But now things are getting stable and we have seen a positive and stable trend in the month of January,” he said.

Tripathy was of the view that digitalization will bring a lot of transparency in the system and help to stabilize the prices of lot of imported products across all retail channels. “Price stability will help in the overall sales growth. Another important point is the cash-to-card ratio impact. Before demonetization, 60% of our sales was by cash transactions and 40% was by card. But during the initial phases of the demonetization, we saw a shift to the tune of 20:80 in the cash-to-card ratio with only 20% as cash transaction. Now, since the last one and a half month, we have seen a trend of 45% is to 55%. We have seen a stronger growth in the online sales as well. We have seen a lot of new customers come to us during this time and who continue to come even now and have become our regular customers. Even though there was an initial drop in the gourmet food section, people are now coming back and gourmet food sales have stabilized with time.”

Sanjay Tandon, Director, Dabon International, noted, “When demonetization happened, the first thing we did was to make sure that all our employees had bank accounts. I am a firm believer that digitalization is the way forward and that organized trade stands to gain a lot from this in the times to come. We took a temporary hit with demonetization because it was our peak season and the impact for us was quite drastic in terms of our sales for the last quarter of the past year. We had a -10% sales impact, which was quite significant for us.”

Striking a positive note Tandon said that sales are now recovering and start of the year has been very decent. “So, in my view, demonetization will help us to gain in the long run. It has created a level playing field for all the right people, and we are pretty hopeful that it will clean up our system and bring better transparency towards work for all of us. Sales did have an impact, but I think the major impact was on mom and pop stores, especially in north India rather than in the west and south where there is a reasonable presence of modern trade.

At this juncture, Lohani noted that the demonetization move came in the thick of the peak tourist season in India. “This was a tourism season and also the marriage season and many people had to abandon their travel plans and cut



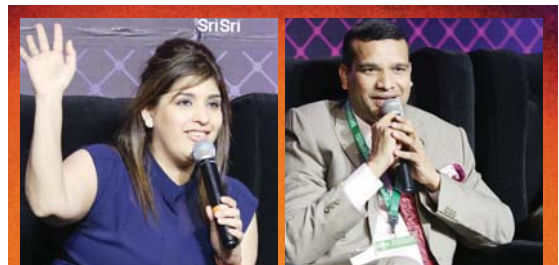
“We took a temporary hit with demonetization because it was our peak season and the impact for us was quite drastic in terms of our sales”

— **Sanjay Tandon**
Director, Dabon International



“Demonetization gave us an opportunity to educate our suppliers on turning digital.”

— **Bharandharan Ramaswami**
Director Procurement, Marriott Hotels, India



Rakhee Vasvani
Chef, Palette Culinary Studio, Mumbai

Nitin Nagrale
General Secretary and Founder of HPMF, and Vice President, Materials Management, Foodlink Restaurants

down on the wedding expenses.” Wondering of the impact that demonetization had on the hotel business that gets a big chunk of its revenue during the season from holidaying tourists and bookings for weddings, Lohani put the question to **Bharandharan Ramaswami, Director Procurement, Marriott Hotels, India.** Responding to Lohani’s observation, Ramaswami said: “What I would like to say is that I only represent one part of the hotel sector. But when I look at the overall scenario of the hotel industry, I don’t see any difference because there are hardly any cash transactions in hotels. There are certain parts where cash transactions happen and those areas saw an impact, which was temporary for a period of 50 or 90 days. Some hotels did not fit the budget of tourists during that period because of the money constraint, and some bookings had to be cancelled or rescheduled. Our hotel did not feel any impact however because most of our transactions are electronic as they come in form of paychecks, credit cards or debit cards.”

Talking about the impact on the hotel’s procurement section, Ramaswami said that as most of the hotel’s payments are in the form of cheque or fund transfers, the heat of demonetization was not majorly felt. “But I think our suppliers had to go through a lot of challenges and struggles, which we heard of. We had to step in and support them in certain particular areas where they wanted early payments or flexible credit period to meet the demands of the situation. It was also an opportunity for us to educate our suppliers on turning digital. May be in the bigger perspective of Marriott as a whole, there might have been a shortfall in the revenue but it was not some major problem,” observed Ramaswami.

To Lohani’s query as to whether the hotel industry is planning to introduce new methods of payment like e-wallets that are now much in vogue, Ramaswami replied: “Yes, some of the restaurants are going for it but if we look at the issue, most people who come to the branded restaurants, they are carrying debit or credit cards with them. But if wallets become the current need and needs to be introduced, I am sure hotels will take the proper steps to meet the demand.”

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Taking the discussion further, **Rakhee Vasvani, Chef, Palette Culinary Studio, Mumbai**, said: “Recently I have launched my Institute, which is the first centre of CTH, and it’s a UK affiliation in India. I think when we introduced this new system, the only effect that demonetization had on us was for a limited period. Yes, some of the students did face a problem, but you’d be amazed to know that in India – in Mumbai and in Delhi – even a small store, like that of a sandwich-wala, has a cash wallet. I think India is too fast and we adapt really fast, in any crisis. We were already abreast with CC avenues system and people were already paying online. Yes, the fact that we were not used to paying too many commitments by card and we were still used to carrying cash led to some hiccups initially. We did face a little setback in the early days, but I don’t think that it was much of a problem.”

Nitin Shankar Nagrale, General Secretary and Founder of HPMF, and Vice President, Materials Management, Foodlink Restaurants, observed that people were very happy about the change taking place. Instead of complaining about the problems, people happily embraced the change. “In fact, some of them were happy that the rich people were getting punished for what they have been doing for years.” Responding to the moderator’s query about the level of digital security in India, Nagrale said: “Most of the people who earlier used only cash are now learning to use card or other methods for payment. So if you talk about the security aspect of digitalization, I don’t have an answer yet. If we talk about trade, it did affect but people are coming back. The buying power has become normal, but I am not too sure about the spending power. I have myself stopped going to restaurants in recent months. Basically, that is to save money for more immediate priorities so that inconveniences can be avoided.”

Rakesh Banga, C-founder, Farmland Foods, recounted his company’s experience in the light of demonetization and its impact on certain government initiative like ‘Make in India’. “The Make in India story came at a very opportune time for us. We were then struggling with the import of meat with respect to the non tariff barriers and food security issues. When the Make in India initiative came, we leapt for it. We started importing premium raw materials from different parts of the world and started converting them into value added products like ham, salami, sausages, which were very premium in the market. It was our first year in the market where demand is very very seasonal. October to February is the time when these premium products see their prime sales period, most of which is to the restaurant and retail industry. When demonetization was introduced in November, we saw a big hit in sales.”

Giving further details of the impact of demonetization on sales of premium meat products,

Banga added: “But the impact on sales was temporary and it was felt in certain regions more than in the others. We saw that our customers in Bangalore and Hyderabad buying regularly, mostly in retail. There, sales did not dip relative to the western or northern part of the country. This might be because digitalization was already there in these places as they are IT hubs. But the rest of the country needs to catch up. From us, now it is more of retail which is opening up though it contributed a small part in our initial stage. But now, the retail market is looking more positive to us. It is one sector that has given us hope that digitalization will bring more market for me.”

Talking about the challenges of digitalization, he said that state of the infrastructure raises valid concerns. “When we talk about manufacturers, vendors, suppliers, we need to look at the whole supply chain system, management, production and



Rakesh Banga, Co-founder, Farmland Foods

sourcing, all of which need to be also digitalized. The more we digitalize those systems, the more efficient they will become. I expect people from the other side of the trade like hotels and retails to drive more connectivity from vendors to their systems through digitalization. For instance, Marriott has digitalized its purchase and ordering systems. But now with more and more services coming up, our systems needs to be augmented and digitalized. And as far as digital security is concerned, we need to be smarter, and learn things from elsewhere. There is no other option. When we have to go digital, we better learn how to secure our wallets and credit cards. I think, that is the way forward.”

The panel discussion was followed by a Q&A session where the audience received answers to their questions from the panelists. Some of these pertained to how digital marketing and the online market is growing every day. People are choosing the convenience of ordering from home over their earlier marked preference for touch and feel. They are also choosing to pay online and go cashless in increasing numbers. **PG**



“**Demonetization disrupted our buying pattern in a big way**”

— **Amit Lohani**
MD, Max Food
and Convener, FIFI



“**We have seen 20% same stock growth during the initial stages of demonetization and sales are now stable and we are at 13 to 14% of same stock growth, which is much higher than what we had before demonetization**”

— **Avinash Tripathi**
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India's brightest shine at food retail's most exciting honours' night

Sofitel Hotel, Bandra Kurla Complex, Mumbai played host to the 10th Annual Coca-Cola Golden Spoon Awards powered by India Gate Basmati Rice on the evening of February 1, 2017. With awards being presented across multiple categories, the ceremony honoured outstanding achievers in food and grocery retail and foodservice retail formats in India. The annual Awards are conferred on India's most progressive and innovative food and grocery retailers as well as food service formats and food retail professionals for outstanding achievements in business performance, category leadership and retail innovation.

Awardees were selected by an eminent jury that comprised Krish Iyer (President & CEO, Walmart India), Debashish Mukherjee (Partner, Co-Head, Consumer & Retail Industries, India & SEA, AT Kearney), Saugata Gupta (Managing Director & CEO, Marico Limited), Siraj Chaudhary (Chairman, Cargill Foods India at Cargill India Pvt. Ltd), Anuj Puri (Chairman & Country Head, JLL India), Amit Lohani (MD, MAX Foods & Convenor, Forum of Indian Food Importers) and Amitabh Taneja (CMD, IMAGES Group).



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Excellence Awards – ON QUANTITATIVE PARAMETERS



IMAGES Most Admired Food Service Chain of The Year: QSR: **Burger Singh**

Nominees: Burger King | Haldiram's | Pizza Hut | Wow! Momo

Received by: Nitin Rana, Co-founder, Burger Singh

Presented by: Anugya Punetha, Coca-Cola, India



IMAGES Most Admired Food Service Chain of The Year: Cafes & Juice Bars: **Chaayos**

Nominees: Chai Point | HAS Juices & More | Starbucks

Received by: Akash Srivastava, Business Development Head & Vineeth Nair, Operations Head, Mumbai, Chaayos

Presented by: Anugya Punetha, Coca-Cola, India



IMAGES Most Admired Food Service Chain of The Year: Ice-cream & Dessert Parlours: **Baskin Robbins**

Nominees: Natural Ice Cream | Nirula's | The Chocolate Room

Received by: Vishal Kapoor, VP - Marketing, Graviss Foods Pvt Ltd

Presented by: Ayush Gupta, Executive Director, KRBL (India Gate-Basmati Rice)



IMAGES Most Admired Food Service Chain of The Year: Casual Dining Restaurants: **Sankalp**

Nominees: Khandani Rajdhani | Pizza Hut

Received by: Ajay Dhanuka, Director, Sankalp Recreation Pvt. Ltd.

Presented by: Ayush Gupta, Executive Director, KRBL (India Gate-Basmati Rice)



IMAGES Most Admired Food Service: Innovation of The Year: **Pizza Hut's TripleTreat Box**

Nominees: Burger King | Burger Singh | Café Udupi | Chaayos | Kabhi Bhi

Received by: Unnat Varma, MD, Pizza Hut (India Subcon)

Presented by: Rishad Karkaria, Coca-Cola, India





Awards

Special Jury Awards – ON QUALITATIVE PARAMETERS



IMAGES Most Admired Food Service Chain of The Year: **Effective Technology Adoption: Chai Point**

Received by: Gurmeet Singh, General Manager, Mumbai, Chai Point

Presented by: Roshan Fernandes, Marketing Manager, Sublime House of Tea & Phil Walker, Export Manager, Christie International Ltd



IMAGES Most Admired Food Service Chain of The Year: **Supply Chain Management: Pizza Hut**

Received by: Unnat Varma, MD, Pizza Hut (India Subcon)

Presented by: Roshan Fernandes, Marketing Manager, Sublime House of Tea & Phil Walker, Export Manager, Christie International Ltd



IMAGES Most Admired Food Service Chain of The Year: **Marketing, Promotions & Customer Service: Starbucks**

Received by: Sowmya Nagrajan, Sr. Manager – Mktg, Kirti B, Category Manager, Tata Starbucks Pvt Ltd

Presented by: Nigel Bryan, Lizi's, UK & Vineet Kanaujia, Vice President, Safexpress



IMAGES Most Admired Food Service Chain of The Year: **F & B Quality, Safety & Menu Planning: Haldiram's**

Received by: Dr. Ashok Kumar Tyagi, Executive Director, Haldiram's Snacks Pvt. Ltd.

Presented by: Nigel Bryan, Lizi's, UK & Vineet Kanaujia, Vice President, Safexpress

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FOOD & GROCERY RETAIL CATEGORIES

Excellence Awards - ON QUANTITATIVE PARAMETERS



IMAGES Most Admired Food & Grocery Retailer of The Year:
Large Format: Big Bazaar

Nominees:

Hypercity | More Megastore
Reliance SMART | SPAR
Spencer's Hyper | Star Bazaar

Received by: Devendra Chawla, Group President, Food & FMCG Brands, Future Group, and CEO, Future Consumer Ltd & team

Presented by: Prashant Parameswaran, Director, Marketing Strategy & Insights, Coca-Cola India Pvt Ltd



IMAGES Most Admired Food & Grocery Retailer of The Year: Supermarkets/ Convenience Stores/ Neighbourhood stores: **More**

Nominees: Easyday | Spencer's Super

Received by: Sumit Chandna, Chief Merchandising Officer, Food & Grocery, Aditya Birla Retail Ltd. & Richa Pai, Merchandise Head-FMCG, Aditya Birla Retail Ltd.

Presented by: Prashant Parameswaran, Director, Marketing Strategy & Insights, Coca-Cola India Pvt Ltd



IMAGES Most Admired Food & Grocery Retailer of The Year: Regional Supermarkets: **Heritage Fresh**

Nominees: Arambagh's Foodmart | Good Food Retail | Modern Bazaar | Navjeevan Super Shop | Nilgiris | Ratnadeep Supermarkets | Twenty Four Seven

Received by: K. Ravindranath, General Manager, Fruits and Vegetables, Heritage Foods Limited, I.G. Balasubramanian, Sr. Manager Marketing (Alliance & New Initiatives), Heritage Foods Ltd

Presented by: Ayush Gupta, Executive Director, KRBL (India Gate-Basmati Rice)



IMAGES Most admired Food & Grocery Retail Innovation of the Year:

Future Retail Ltd

Making Kosh the third grain of India

SPAR

Q Buster & Shop Floor Assistant Mobility Apps

Nominees: Spencer's – Omni Channel
Star Bazaar – Focus on Fresh

Received by: Devendra Chawla, Group President, Food & FMCG Brands, Future Group, and CEO, Future Consumer Ltd & team

Ponnu Subramanian, Chief Operating Officer, Max Hypermarket India Pvt. Ltd. & team

Presented by: Jean Pierre Garnier, Head of Exports, AHDB & Gaurav Sharma, Director Sales, Kellogg's



IMAGES Most Admired Category Performer of the Year: Staples: **Kuldeep Goyal, VP-Merchandising, Spencer's Retail**

Nominees: Mukul Sahay, AGM-Staples, Heritage Foods Limited | V. Elumalai, Business Head, Staples, Dairy & Frozen, Max Hypermarket Pvt. Ltd.

Received by: Kuldeep Goyal, VP- Merchandising, Spencer's Retail

Presented by: Jean Pierre Garnier, Head of Exports, AHDB & Gaurav Sharma, Director Sales, Kellogg's





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IMAGES Most Admired Category Performer of the Year: **Meat, Fish & Livestock:**

Pramod Onkarappa, Senior Business Manager, Fish & Meat, Max Hypermarket India Pvt. Ltd

Nominee:

Dr. Dnyaneshwar Namdev Phadtare, Buying & Merchandising Head-Meat, Fish and Frozen, Hypercity

Received by: Satish SV, Head - F&V, L&T and Fish & Meat, Max Hypermarket India Pvt. Ltd

Presented by: Harshita Gandhi, Director, Tree of Life & Lyn A Pitt, Managing Director, DTG, UK



IMAGES Most Admired Category Performer of the Year: **Fruits & Vegetables: Maneesh R. Dumbre**, General Manager, Buying and Merchandising - Fruits & Vegetables, Hypercity

Nominees: **K. Ravindranath**, General Manager, Fruits and Vegetables, Heritage Foods Limited
Sudhagar. S, Senior Business Manager, Fruits & Vegetables, Max Hypermarket India Pvt. Ltd.

Received by: Maneesh R. Dumbre, GM, Buying and Merchandising, Fruits & Vegetables, Hypercity

Presented by: Keyur Bhatia, MD, TJUK & Vikram Agarwal, MD, Cornitos



IMAGES Most Admired Category Performer of the Year:

Beverages & Confectionery:

Rahul Kumar Choudhary
Category Head, Beverages
Reliance Retail Ltd.

Nominees: **Ashesh Sawhney**, Business Head- FMCG (Carbonated/ Juices/ Confectionery/ Chocolates),Max Hypermarket Pvt. Ltd. | **Ganesh Mishra**, Head, Commercial & **Saif Kohari**, Category Manager, Trent Hypermarket Pvt. Ltd

Received by: Rahul Kumar Choudhary, Category Head – Beverages, Reliance Retail Ltd.

Presented by: Harshita Gandhi, Director, Tree of Life & Lyn A Pitt, Managing Director, DTG, UK



spencer's

IMAGES Most Admired Category Performer of the Year: **Processed Food & Savories:**

Kuldeep Goyal, VP-Merchandising (Food & FMCG), Spencer's Retail

Nominees: **Johnson John**, Category Head – Processed Food, Reliance Retail Ltd
Ganesh Mishra, Head Commercial & **Saif Kohari**, Category Manager, Savories, Trent Hypermarkets Pvt. Ltd

Received by: Kuldeep Goyal, VP-Merchandising (Food & FMCG), Spencer's Retail

Presented by: Keyur Bhatia, MD, TJUK & Vikram Agarwal, MD, Cornitos



IMAGES Most Admired Category Performer of The Year: **Home & Personal**

Care: Partho Dev Sharma, Category Head, Home & Personal Care, Reliance Retail Ltd.

Received by: Vallabh Soudagar, Business Head-FMCG, Reliance Retail Ltd (value format)

Presented by: Rahul Jain, MD, Gold Fogg & Adam Bradson, Trade Counsellor, USDA

spencer's

IMAGES Most Admired Category Performer of the Year:


Tobacco & Liquor: Kuldeep Goyal, VP-Merchandising (Food & FMCG), Spencer's Retail

Nominee: **Girish TJ**, Sr. Category Manager, Liquor & Tobacco, Max Hypermarket India Pvt Ltd (SPAR)

Received by: Kuldeep Goyal, VP-Merchandising (Food & FMCG), Spencer's Retail

Presented by: Rahul Jain, MD, Gold Fogg & Adam Bradson, Trade Counsellor, USDA



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IMAGES Most Admired Food & Grocery Retailer of The Year: **Effective Technology Application: Hypercity**

Received by: Ramesh Menon, CEO, Hypercity Retail India Ltd & Hemant Taware, COO, Hypercity Retail India Ltd.

Presented by: Vimal Anand, MD, Apis & Oliver Mirza, MD, Dr Oetkar India



IMAGES Most Admired Food & Grocery Retailer of The Year: **Supply Chain Management: Easyday**

Received by: Purandhar Potineni, CEO, Easyday, Future Retail Ltd.

Presented by: Kapil Kohli, V P-Retail, Usha International & Jaspal Singh Johar, National Head, Veeba



IMAGES Most Admired Food & Grocery Retailer of The Year: **Human Resource Policies & Initiatives: SPAR**

Received by: Ponnu Subramanian, COO, Max Hypermarket India Pvt. Ltd.

Presented by: Ameeta Virk, Marketing Specialist India, Department of International Trade, UK & Sandeep Grover, President, World Forum Food & Wine



IMAGES Most Admired Food & Grocery Retailer of The Year: **Merchandising, Marketing, Consumer Promotions & Customer Service: Reliance SMART**

Presented by: Mukesh Kumar, Vice President, Infiniti Malls & Nainaz B Shroff, MD, Taylor & Shroff Ltd.



IMAGES Excellence Award for Lifetime Achievement: **Mahashay Dharam Pal Gulati**
Owner, MDH Pvt Ltd



IMAGES Most Admired Food & Grocery Professional of The Year :

Devendra Chawla, Group President, Food & FMCG Brands, Future Group and CEO, Future Consumer Ltd.

Received by: Devendra Chawla, Group President, Food & FMCG Brands, Future Group, and CEO, Future Consumer Ltd.

Presented by: Amitabh Taneja, CMD, IMAGES Group





SOUTH INDIA RETAIL AWARDS

K. T. Srinivasa Raja,
MD, Adyar Ananda Bhavan

Received by: K. T. Srinivasa Raja,
MD, Adyar Ananda Bhavan

Presented by: R S Roy, Executive Director,
Trusted Board; Editorial Director,
IMAGES Group



M. Murali,
MD, Sri Krishna Sweets

Received by: M. Murali, MD, Sri Krishna Sweets

Presented by: Mohammed Younis Jamal AISayed,
International Market Development Manager,
Dubai Exports



M. Mahadevan,
Chairman & Director,
Oriental Cuisines/Hot Breads

Received by: Reynold Fernandes, CEO,
Oriental Cuisines Pvt. Ltd.

Presented by: R S Roy, Executive
Director, Trusted Board; Editorial
Director, IMAGES Group



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Session by Prathmesh**



**USA PEARS Live Kitchen Session
by Chef Varun Inamdar**



**Veeba Live
Kitchen
Session by Chef
Chamandeep &
Chef Amit**



**MDH Live Kitchen Session by Junior
Master chef Emanuel Chauhan**



**Food service India Live Kitchen
Session by Chef Preetha**



DRINKS THEATRE



Dabon Live Kitchen Session by Chef Janmejaye Sachdeva



Sri Sri Live Kitchen Session by Le Kitchen Chef



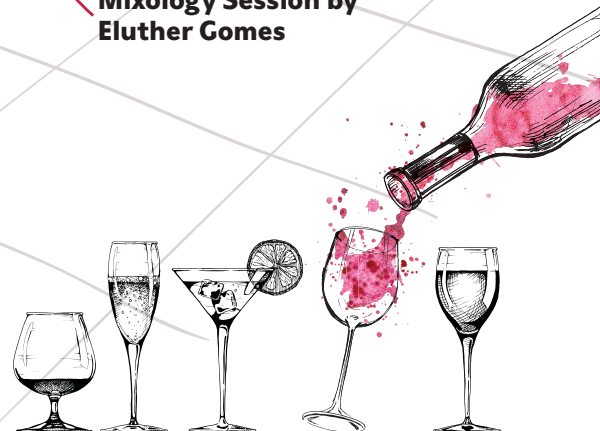
USA Pears Live Kitchen Session by Master Chef Dinesh Patel



Food Service India Mixology Session by Eluther Gomes



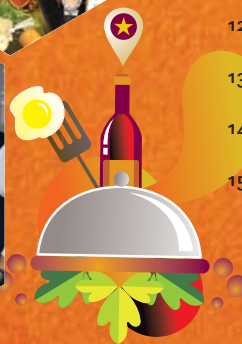
Norwegian Seafood council Live Kitchen Session by Chef Saby

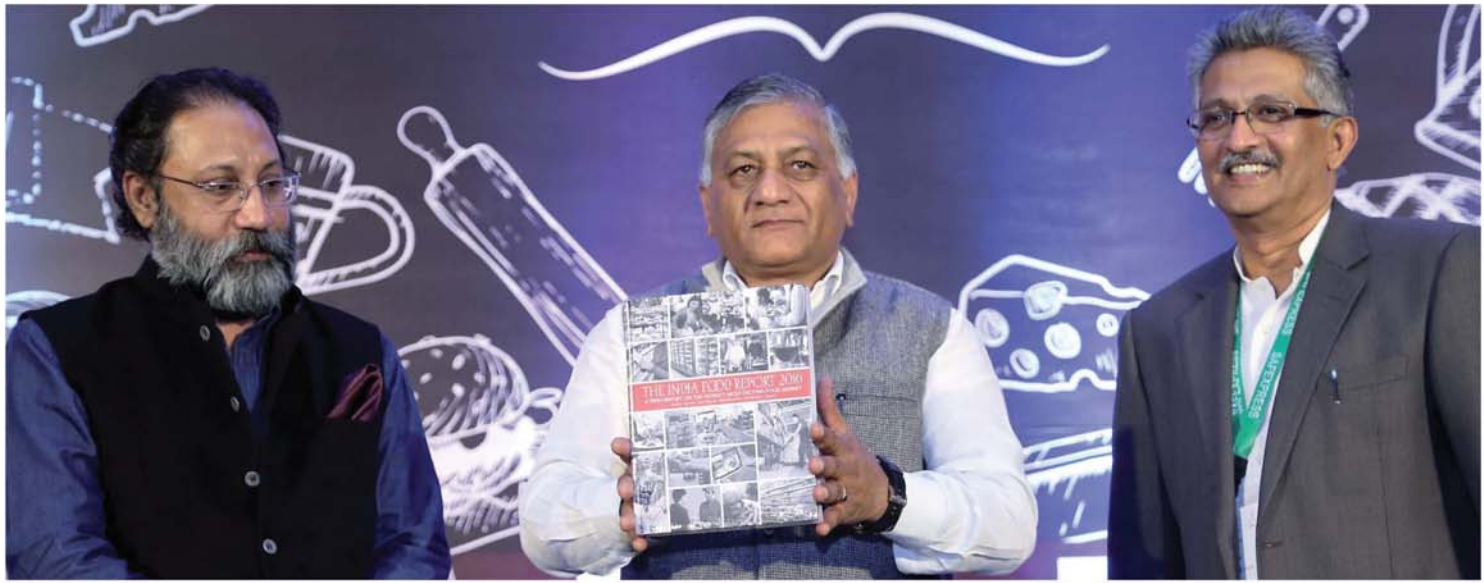




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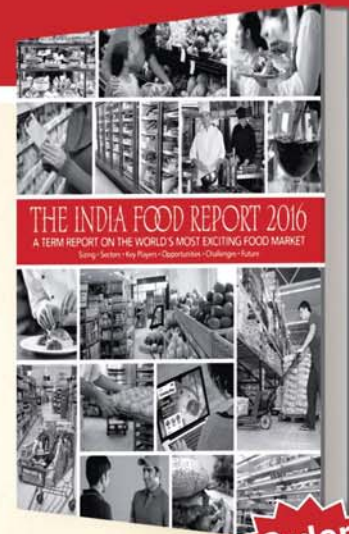
1. Abhinav Biswas (Business Head-RZ International) meeting with Delegates
2. Ameeta (Leader-DIT Delegation) with Rakesh Sachdeva (Luxury Gourmet)
3. Amit Lohani (MD, MAX FOODS and Convenor at FIFI) with Adam Branson (Sr. Ag Attache USDA)
4. Arvind Varchaswi (MD - Sri Sri Products), Kapil Kohli (President USHA International), Amitabh Taneja (CMD-Images Group), Anjali Sondhi (Director-Images Group), Lokesh Arora (VP- Images Group)
5. B2B Meeting with DIT Delegations
6. Keith Sunderlal (SCS Group) with Chef Dinesh Patel during USA Pears Session at Live Kitchen
7. Keyur Bhatia (Chairman-TJUK) with Delegates
8. Kuldeep Goyal (Vice President - Buying & Merchandising (Food & FMCG) at Spencers Retail) with Exhibitors
9. Mahashay ji (CEO-MDH) with Nitin Shankar Nagrale (Founder-HPMF)
10. Ponnub Subramanian (COO) with Team Max Hypermarkets (SPAR India)
11. Bhanu Pratap (Head-Regional Brands at Reliance Cash and Carry) with Roshan Fernandes & Vinod Ramaswamy (Sublime)
12. Jaspal Singh Johar (Veeba) interacting with Delegates
13. Oliver Mirza (MD-Dr.Oetker) with Mr. Vijay Juneja (MD-Dairy Craft)
14. Mahashay ji (CEO-MDH) with Raman Khanna (CEO-Grihasthi Masala)
15. Rakesh Gambhir (India Head-Dubai export), Mohd. Al Syed (International Manager) with Ritesh Bajaj (MD-KBB Nuts), Naresh Gupta (President-KBB Nuts)





INDIA FOOD REPORT 2016

THE MOST AUTHORITATIVE GUIDE TO FOOD RETAIL MARKET IN INDIA



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India Food Report 2016 was released on January 19th by General (retd.) V.K. Singh, Union Minister State for Statistics and Programme Implementation (independent charge), Minister of State for External Affairs & Minister of State for Overseas Indian Affairs.

"Indian Retail Food Market has the potential to not only double but triple in the next 4-5 years by 2020, aided by the government's initiative to bring in systemic change, despite resistance, said the Minister at the launch of the Report.

The Report has been compiled with inputs from some of the world's most respected consulting and/or market study organisations, retail business heads, brand analysts and consumer research companies, among others.

Organisations/industry experts who have contributed to the making of the Report include Nielsen, A T Kearney, Accenture, PWC, Technopak, IMRB, GS1, Institute for Competitiveness, IFC, Troika, PRICE, Wazir, Maple Capital Advisors, D'Essence Hospitality Advisory, IBEF, NRAI, IMT, IIM, Rama Bijapurkar, Dr. Rajesh Shukla, and Harish Bijoor to name a few.

THE INDIA FOOD REPORT 2016 - HIGHLIGHTS

- | | | |
|-----------------------------------------------------------------------------------------------|-----------------------------------------------|---------------------------------------|
| ▶ Food & Grocery Sector-Market Sizing, Overview, Trends, Opportunities, Profiling Key Players | ▶ Fresh Produce | ▶ Key Regulatory Issues |
| ▶ Food Service Sector- Market Sizing, Overview, Trends, Opportunities, Profiling Key Players | ▶ Processed Foods | ▶ New Challenges & Solutions |
| ▶ Retail Formats & Emerging Retail Formats | ▶ Safety, Health, Convenience, Sustainability | ▶ Technology & Support |
| ▶ Non Store Retail Channels | ▶ Food Supply Chain in India | ▶ International Foods |
| | ▶ Storage / Warehousing | ▶ Investment & Business Opportunities |
| | ▶ Food Processing Sector in India | ▶ Hospitality Sector |
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Foodaholics, rejoice! Exciting platter on tap

Komal Anand, head of Retail Sales and Marketing and Supply Chain at McCain Foods, lists out seven food trends that will dominate the Indian food industry in 2017.

From fashion trends to travel hotspots to varied cuisines, what is there not to watch out for this year as we move ahead? The past year was all about functional foods, new spice trends, innovative food products and fancy restaurants decors. We saw molecular gastronomy breaking free from the stereotype of fine dining restaurants and kitchens of professional chefs and making its way into our home kitchens. Who would have thought that turmeric – our very own haldi – would steal the thunder of its more exotic counterparts such as cinnamon and plum cake spice and be used as a surprise ingredient in meals, beverages, and even desserts. Turmeric latte anyone?

As we march ahead and deeper into the new year, here are some trends that will mark themselves out.

Avant Garde Condiments: As fancy as the name suggests, avocado and creative condiments like black sesame tahini, habanero jam and black garlic purée will scintillate the menus in 2017. Indians have had a soft corner for exotic herbs and spices ever since pastas and pizzas dominated the food industry.

Herbs have even made their way to the grocery baskets. From avocado oil and desserts to topping all food with exotic herbs, this trend is sure to woo the taste buds.

Root-to-Stem Style, Waste-Based Cooking: The amount of food lost and wasted every year is equal to



more than half of the world’s annual cereals crops. While 2016 promoted the concept of reduction in food wastage, there is still a long way to cover. The idea will be one of the hottest trends in the year 2017.

Cooking root-to-stem i.e., not wasting any part of the produce, cooking from left-overs, fruits, vegetables, meat, etc., and cooking alternative dishes from one ingredient/product will be on priority for many chefs/households around the world. Portion control with right size packs of frozen food will add to the trend.

Specialty in Comfort: What better gift to our busy lives can be than a ready-to-cook snacks and meals? Initially clouded in the doubts of freshness, studies have shown that not only freshness but nutrition value too remains intact in the frozen/ready-to-cook food products as freezing is a natural preservative. Many restaurants and food chains these days are fine-tuning the concept of ready to eat snacks and meals by adopting the concept of Foodie Meal Kits. Based on the same concept, Foodie meal kits are tasty, easy-to-cook, less time consuming and are available in variety of choices from frozen food products to gourmet meals. Frozen ready-to-cook snacks are already a part of everyday grocery purchase.

Veggies Delight: Vegetarian food will be the hottest trend of the coming year. Based on the same, eating more vegetables in the main course will be a preferred trend of 2017. As the number of delicious vegetarian offerings increase and benefits of vegetarian meals become visible and noticeable on the positive effects of a plant-based diet, people

will surely include them in their diet in a major way. Greens and potatoes have always been lauded for taste and versatility.

Seaweed, alternative pastas made from quinoa, lentils, and chickpeas are also expected to top the charts of 2017 food trends.

Persian Foods: Middle Eastern cuisine with kebabs and stews has for long won a place with the Indian foodaholic. The Persian flavors are set to dominate the food menus in 2017 also. Persian cuisine is rich in flavors, and uses a combination of different spices, fruits, vegetables and dried fruits to make some special dishes.

Apart from their staple meat dishes, the Persian flavors will serve an array of choices in terms of cookies & snacks, appetizers, breads and desserts.

Not Just Sushi: There is no denying that we all love sushi, but Japanese food has a lot more to entice than just the spicy flavours of delicious sushi.

Japanese cuisine is expected to offer all of us a menu of options ranging from tasty boiled vegetable and rice dishes to soups, vegan salads and delectable desserts.

Potato-Potato: Commonly blamed on basis of outcomes of cooking style that could be fattening, potatoes otherwise are a great source of vitamin B6, potassium, dietary fiber, and phytonutrients that have antioxidant activity.

In 2017, potato is expected to go beyond fries in side dishes to rule the plate as a main! Dishes ranging from potato salads to even chocolate potato cakes will be seen on the menus. **PG**



“
Eating more vegetables in the main course will be a preferred trend of 2017

— **Komal Anand**
Head of Retail Sales and Marketing and Supply Chain at McCain Foods

BUDGET BOOSTER for Retail Industry

Progressive Grocer speaks to two retail industry stalwarts on what Budget 2017-18 has for the retail sector.

“The abolition of FIPB, introduction of a model law on contract farming and the simplification of labour laws augur very well for the the retail industry.”

Krish Iyer

President and CEO, Walmart India

Government's continued focus on the ease of doing business is very evident from the various measures it has taken in the Union Budget. Some of these initiatives are the abolition of FIPB, introduction of a model law on contract farming and the simplification of labour laws under four areas: wages, industrial relation, social security and welfare and safety. All these initiatives augur very well for the economy and the retail industry.

Another highlight of the Budget – which will be a big positive for the retail industry – is the income tax relief to the lowest income bracket. It is a laudable step and will go a long way in bringing back consumer confidence and boosting domestic consumption. I would also like to point to the measures announced for boosting the manufacturing sector. Rewarding MSMEs by reducing the rate of income tax will further boost the 'Make in India' initiative. The proposal to set up a dairy processing fund will give a leg-up to food processing. The rural sector also gets a boost with increased allocation for MNREGA.



The thrust of this year's Budget is pro-poor, pro-consumption and pro-growth. The triple prongs of the Budget to 'transform, energise and clean' India will have some immediate as well as long-term impact on business in general, and retail in particular. This Budget, along with the Finance Minister's road map of GST implementation is music to the ears of retailers.

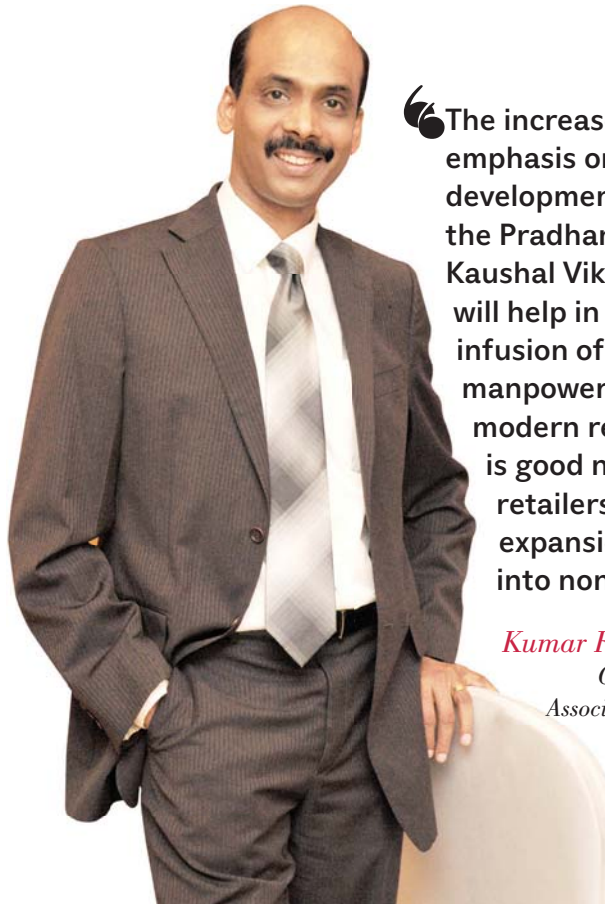
Overall, the Budget has laid emphasis on digitisation, infrastructure, support to farmers, low-cost housing and ease of doing business. Some key implications of the Budget for the retail sector are as under:

- >> **Pro-consumption:** More Money in the hands of people
 - The large thrust on infrastructure development will generate employment, increasing the number of people with purchasing power.
 - The reduction of tax rate from 10% to 5% for Rs. 2.5 lakh to Rs. 5 lakh bracket will create disposable income of Rs. 12,500 per annum in the hands of individuals.

- >> **Ease of doing business:** Will help accelerate modern retail
 - APMC Amendment for direct sourcing of perishables from farmers and contract farming is in favour of retailers on various counts, the benefits of which will be passed on to the ultimate consumer.
 - Emphasis on adoption of Model Shops and Establishment Act. The Act seeks to allow shops, malls and other retail establishments to operate throughout the year with flexibility to open and close at their convenience. In addition, it provides for women to be employed in night shifts with adequate security.

The agenda of the Budget to 'transform, energise and clean India' is indeed noteworthy. Government's commitment to lift one crore people out of poverty by 2019 is commendable. At the same time, the government's steps to promote digital economy post demonetization are very logical and will help to expand and strengthen the formal economy.

Overall, this is a very good budget with lots of positive upsides for the retail sector. The adherence to fiscal discipline with an emphasis on growth and development and to increasing the infrastructural & rural spending and encouraging the formal economy are the key attributes of this year's Budget. Along with the measures outlined in the Budget, other government initiatives in the form of demonetization, structural reforms and the implementation of Goods and Service Tax will propel the retail sector into the modern economy, and help attract significant foreign investment.



“The increased emphasis on skill development through the Pradhan Mantri Kaushal Vikas Yojana will help in the infusion of skilled manpower into modern retail and is good news for retailers on an expansion spree into non-metros.”

Kumar Rajagopalan
CEO, Retailers Association of India

- Phasing out of Foreign Investment Promotion Board (FIPB) can accelerate FDI funding in the sector as approvals will be faster.

- >> **Ease in taxation:** Reduced burden on small retailers
 - Small traders having a turnover of less than Rs. 2 crore can avail presumptive tax benefit under sections 44AD and pay 6% of turnover as against 8% earlier.
 - The effective tax impact on retail companies having a turnover of less than Rs. 50 crore has been reduced from 30% to 25%. The reduction of 5% is a great relief for small retailers.
 - Extension of minimum alternate tax (MAT) credit utilisation from 10 years to 15 years will help retail businesses as they have a long gestation period.

- >> **Accelerated manpower fulfilment:** Increased skilled workforce
 - The increased emphasis on skill development through the Pradhan Mantri Kaushal Vikas Yojana (PMKVY) will help in the infusion of skilled manpower into modern retail. It is good news for retailers on an expansion spree into non-metros.

The Finance Minister has kept something for everyone in the Budget, with major emphasis on accountability and transparency. We have already witnessed a big tilt towards modern retail post demonetisation and the measures proposed in the Budget will further accelerate the pace. We await the implementation of GST to further the cause of chain stores and omni-channel retail in the country. **PG**

Big Bazaar:

Handsome payoffs from innovative tweaks

Kishore Biyani-led Big Bazaar has been making path-breaking innovations to make the shopping experience more seamless and joyful. Such examples include the introduction of special schemes such as 'guess the price' and 'quick checkout' to the launch of its own digital wallet and Gen Nxt stores.

By Charu Lamba



During the Republic Day sale, Big Bazaar gave an exclusive opportunity to its customers to skip the billing line. For 'Sabse Saste 6 Din' event, as the Republic Day sale was billed, customers were able to reduce their checkout time by booking their 'quick checkout' time slot online.

This unique concept was introduced to address the issue of waiting time that customers experience when queuing up in the billing line. Under the scheme, customers booked their 'tokens' for a quick checkout online on Bigbazaar's website between January 20–25. Limited tokens were available and booking was done on first-come-first-serve basis.

Explaining the 'quick checkout' option, Business Head, Big Bazaar, Sadashiv Nayak told Progressive Grocer on the sidelines of India Food Forum 2017, "Quick checkout enabled customers to book a time slot for checking-out on bigbazaar.com. A customer just had to pay Rs. 100, come and bill with us in the

chosen time slot and get the Rs. 100 back. So we gained a lot of traction and a lot of people used that."

Elaborating on the success of the 'quick checkout' initiative, Nayak said, "It performed fantastically well, we discovered a new base in and across the categories. Our small towns did fantastically well and we discovered a very different kind of a customer walk-ins. Overall, it was one of our best events done so far. Buoyant and optimistic consumerism is what we witnessed for the six days."

The 'quick checkout' was a first of its kind initiative by Big Bazaar to make shopping convenient during 'Sabse Saste 6 Din'. Apart from making the shopping expedition a hassle-free experience, the feature also contributed to the overall revenue and added to the customer base.

Big Bazaar also made sure that its home delivery was seamless and the customers got the delivery the very next day. The retailer also introduced a novel mechanism for engaging customers on the digital

medium. It launched a promotion called 'guess the price', in which customers guessed the prices of products based on Twitter shares and then priced products accordingly.

Initiatives like 'quick checkout' and the recent introduction of its e-wallet facility has had a positive sales rub-off effect on Big Bazaar. "We found some growth but more than the numbers, we were able to get a very different profile of customers and shoppers who readily took to our wallet, which we count as a big achievement. We got close to two million people who possibly could now become members of our wallet. All of them haven't downloaded it but they will over time. We will soon see them engaging far more frequently and regularly with Biz Bazaar through the wallet, which is called 'Future Pay' wallet," said Nayak.



Gen Nxt Stores

Over the past few months, Big Bazaar has always been trying to bring something new to the customer by way of its Gen Nxt stores. The Big Bazaar Gen Nxt stores are designed in such a modular way that they can constantly evolve and can undergo continuous upgrade to incorporate more technology-led interfaces and innovations. They have enhanced features like smart trial rooms, sit-down lounges for checkouts and endless aisles or digital interfaces that can take orders for products or inventory not stored in every store.

"There are a total of four stores now – two in Delhi and two in Mumbai. Gen Nxt was an idea for the customer of tomorrow. It lets customers experiment with food, cut and chop vegetables, design their own atta, etc. We may not call every Big Bazaar Gen Nxt, but our ideas can safely travel and that's what we're really attempting to do. All those ideas are travelling. There may be copy cat Gen Nxts but frankly the name to me is immaterial. Carrying forward the ideas is far more important. So Gen Nxt is anticipating the

new customer not only in food but also in fashion and home," revealed Nayak.

Big Bazaar Gen Nxt stores have a technology upgrade at cash tills, which ensure faster checkouts. They come with experience zones for multi-sensorial experiences for food products, a wider merchandize and assortments across all categories and a whole new design topped with LED lighting, large digital screens, digital shelf talkers and energy saving technologies that optimize air-conditioning, humidity and lighting within the store.

Going forward Future Group is planning to open more such stores and over time upgrade many of its existing stores up to these levels.

New benchmark for food business margin

Since margins in food retailing business in India are comparatively low, therefore instead of competing on prices, Big Bazaar has developed a new lens to look at food – margin multiplied by rotation.

Explaining the concept further, Nayak said, "If we look at the fruits and vegetables business, the margin is hardly 2-4 per cent. But we can rotate it 360 times a year. So, now what bigger margin can it be! The margin may be 2-4-6 per cent but you're going to rotate it 360 times a year. That's the kind of money that will get investments."

The margin is a function of how much the customer is willing to pay. And if the brand introduces exclusive products, then MRP doesn't matter. It depends on the brand to decide whether it is going to make it affordable for the first two years, and then charge something that the customer is willing to pay. So, the margins depend on the price that the brand can decide.

The retailer is also relooking its approach to distribution. "We look at the larger companies. There have always been two to three distribution points. If you're able to consolidate that, there is good 3-4 per cent there to be earned for us. Our engagement is with all the larger companies. I'm going to give you predictable forecast of the demand and you need to pass it on by supplying to me directly. So there is a whole lot of money there. We are moving on from looking at the food margin in phase I, when there were very few retailers in the country and all of them competing on price," he said. According to Nayak, "the margin percentage is a misleading figure and we are very happy to have evolved to a new benchmark for calculating the margin. It is frankly how many times you can rotate, and I think we are capable of rotating it at least 50 times in a year. So even if we earn 0.5 per cent, the net retain margin is still good enough for us. The idea is how many times we're going to rotate. Our entire focus is how do you get volumes and if at the end of it even if you get an extra per cent from the brand, I think that's more than enough," he concluded. **PG**



“We found some growth but more than the numbers, we were able to get a very different profile of customers and shoppers who readily took to our wallet

— Sadashiv Nayak
Business Head,
Big Bazaar

Adapting brick-and-mortar stores for omni-channel strategies

Although e-commerce is growing quickly on a global scale, physical stores will continue to play a key role in retailers' overall omni-channel efforts.

By **Michelle Malison**

Till as recently as 2015, 90 per cent of global retail sales were still from store-based retailing. While many retail purchases are now digitally-influenced, the role of physical stores is evolving instead of declining in significance. In the future, shopping in physical stores will likely be done less frequently because of e-commerce, but the stores themselves will become more experiential and social. Retailers should therefore strategize to maximize the in-store experience by leveraging their physical stores as places of transactions, branding tools and even as fulfilment centres.





As customers increasingly engage in channel hopping, retailers must be prepared for all types of transactions in stores. Although many retailers are investing in enhancing their online presence, many customers are completing their purchase process in physical stores. Many shoppers are webrooming, which is the practice of researching a product online before making the purchase at a physical store. Shoppers will webroom most commonly when considering expensive purchases, such as electronics, that often demand a great deal of research and comparison before ultimately making a purchase.

Furthermore, with the rise of e-commerce, customers are making more purchases online, but relying on physical stores for returns and exchanges. To achieve omni-channel proficiency, retailers must be prepared to offer a consistent, seamless shopping experience by accepting returns and exchanges of online purchases in their physical stores. Consequently, it is becoming increasingly important for retailers to have inventory management systems for online and offline platforms that communicate with each other.

Retailers should leverage their physical stores for branding efforts. Physical stores is the principal channel available to shoppers to engage with a retailer's brand. These stores are increasingly becoming a place for experiential shopping (versus transactional shopping, which is being claimed by online channels as they often offer greater convenience). The shopping experience uniquely offered by physical stores explains why many digitally-native retailers are investing in physical stores.

For example, e-commerce giant Amazon.com is opening physical stores – both pop-up and more permanent fixed book stores. The retailer understands the role that physical stores play in building its brand in ways that it cannot online. Additionally, Amazon will leverage these stores to showcase its own hardware products that are not sold by many other retailers. By building its own stores and using them to showcase its hardware products such as the Amazon Kindle and the Echo, the retailer can tightly control its brand and help customers understand how the products work.

Apple Inc. is another example of a company successfully leveraging its network of brick-and-mortar stores to build its brand. Retailers such as Apple demonstrate how important it is to maintain a strong network of physical stores to build its brand

by showcasing its products and creatively interacting with its shoppers.

Meanwhile, some retailers, such as Lululemon, are using their physical stores to build community centres. In addition to selling fashionable athleisure apparel, the retailer also hosts community-centred events such as Run Club and in-store yoga. These events serve as brand-building exercises, and enable the retailer additional opportunities to engage with its customers.

(Some) retailers can leverage their network of stores to meet rising demand for fast, convenient fulfilment. As customers increasingly demand quick fulfilment of orders, some retailers can leverage their physical stores as fulfilment centres for services. This strategy is not for all retailers, as retailers' fulfilment strategies depend on their business models. For example, Bonobos, an apparel specialist retailer, utilises its physical stores as "guide shops" for shoppers to simply browse through and get their products fitted to purchase online for delivery. Bonobos stores will therefore keep very little inventory.

Meanwhile, other retailers are utilising more of their store space to keep inventory for more efficient, faster fulfilment. An example of a retailer implementing this strategy is Home Depot. In FY2015, the retailer rolled out its BODFS (Buy Online, Delivery from Store) feature. The retailer will leverage what it believes is a sufficient network of stores and seeks to increase their productivity by integrating its online business with its offline stores. Retailers should keep in mind that this initiative will likely benefit only those that already have a large store footprint.

Retailers must continue to invest in physical stores in ways that best support their business model.

As the implementation of omni-channel strategies change the retailing landscape, the role of brick-and-mortar stores is quickly evolving. The exact role of physical stores will differ depending on the retailer and its current set of assets and objectives, but physical stores will remain core to the omni-channel shopping experience and retailers must continue to invest in them. **PG**

To achieve omni-channel proficiency, retailers must be prepared to offer a consistent, seamless shopping experience by accepting returns and exchanges of online purchases in their physical stores.



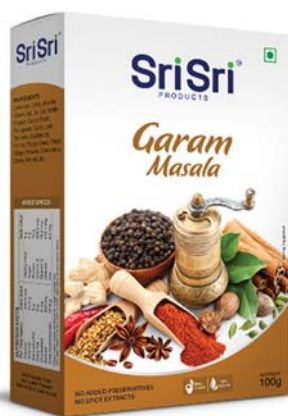
The writer is Research Analyst – Retail at Euromonitor International

what's next

► **Sri Sri Ayurveda launches spices**

Leading FMCG brand Sri Sri Ayurveda has recently launched a plethora of spices: Garam Masala, Chilly Powder, Chaat Masala, Biryani Masala, Kitchen King, among others.

These spices are extracted in their purest form and are packed in such a way that the aroma and taste remains intact. Enriched with the goodness of nature, the spices are available in small box packs of 100 gm. The prices start at Rs. 35 and go up to Rs. 70.



▼ **IFB Agro brings out Minute Meals**

IFB Agro has introduced a whole new range of ready-to-eat 'Minute Meals'. These meals come in three exotic variants: Thai Red Curry with Jasmine Rice, Fried Rice with Chestnuts and Asian Fried Noodles. The Minute Meals are 100 per cent vegan, low-cholesterol and contain no MSG and no preservatives. These meals are packed in microwave safe trays and are available in 310 gm, 280gm and 330 gm packs respectively. Priced at Rs. 110, these meals are available at selected retail outlets.



▼ **Cornitos launches Chunky Salsa Dips**

Nacho chips brand Cornitos has introduced a new range of Chunky Salsa dips. These dips come in three variants: Hot Chunky Salsa, Mild Chunky Salsa and Pineapple Chunky Salsa. These products are gluten-free, 100 per cent vegetarian and has no added preservatives. The salsa dips come in a 330 gm jar pack and are available at all leading retail outlets and online grocery stores.



► **Mother's Recipe launches new chutneys**

Mother's Recipe from the House of Desai Brothers Ltd. has recently introduced a new range of traditional Indian chutneys. These chutneys come in five variants: Bhelpuri chutney, Delhi Chat chutney, Red Chilli Garlic chutney, Samosa chutney & Tamarind & Date chutney. These chutneys come in quirky bottle packaging of 330 gm, 370 gm and 380 gm. The prices start at Rs. 59 and go up to Rs. 79.



► **Cremica introduces Mustard sauces**

Sauces and condiments player, Cremica has come up with two variants of mustard condiments: the English mustard and the Kasundi mustard sauce to suit various palate preferences. These dipping sauces come in easy to squeeze packs of 300gm, priced at Rs. 77 for English mustard sauce and Rs. 70 for Kasundi sauce. These sauces are available at all leading retail stores and online e-grocery portals.



► **Typhoo rolls out Lemon & Honey Green Tea**

British tea brand Typhoo has added lemon and honey green tea to its existing repertoire of products. Enriched with the goodness of green tea, lemon and honey, this variant is a rich source of vitamins, minerals, copper, magnesium and antioxidants. This blend helps in reducing weight and prevents from seasonal cold and cough. It is available at all leading retail outlets and gourmet stores. The product is priced at Rs. 210 for 25 tea bags.



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Big initiatives in retail

The Indian retail industry accounts for over 10 per cent of the country's GDP and eight per cent of the employment. India is the world's fifth-largest global destination for retail ventures and the market is expected to nearly double to US\$ 1 trillion by 2020 from US\$ 600 billion in 2015. The overall market is expected to grow at 12 per cent per annum, and modern trade would expand twice as fast at 20 per cent per annum and traditional trade at 10 per cent.

In the B2B e-commerce, India is expected to reach \$ 700 billion by 2020, becoming the world's fastest growing e-commerce market. Online retail is expected to be at par with the physical stores in the next five years. Various agencies have high expectations about growth of Indian e-commerce markets.

Retailers should leverage the digital retail channels (e-commerce), which would enable them to spend less money on real estate while reaching out to more customers in tier-2 and tier-3 cities

Investment Scenario

The Indian retail trading has received FDI equity inflows totaling US\$ 537.61 million during April 2000–March 2016, according to the Department of Industrial Policies and Promotion. With the rising need for consumer goods in different sectors, including consumer electronics and home appliances, many companies have invested in the Indian retail space in the past few months.

Government Initiatives

Government has taken various initiatives to improve the retail industry in India. These are:

- Allowing 100 per cent FDI in online retail of goods and services through the automatic route.
- Government of Andhra Pradesh signed pacts worth Rs. 1,500 crore in a wide range of sectors including retail during the recent Partnership Summit in Visakhapatnam, while also unveiling a policy to attract retail businesses to invest in the state.
- Ministry of Urban Development has come out with a Smart National Common Mobility Card (NCMC) model to enable seamless travel by metros and other transport systems across the country, as well as retail purchases.
- IKEA, the world's largest furniture retailer, bought its first piece of land in India in Hyderabad for building a retail store. IKEA's retail outlets have a standard design and each location entails an investment of around Rs. 500–600 crore (US\$ 74–89 million).
- Government has accepted the changes proposed by Rajya Sabha select committee to the bill introducing GST. Implementation of GST is expected to enable easier movement of goods across the country, thereby improving retail operations for pan-India retailers.
- Government has approved a proposal to scrap the distinctions among different types of overseas investments by shifting to a single composite limit, which means portfolio investment up to 49 per cent will not require government approval nor will it have to comply with sectoral conditions as long as it does not result in a transfer of ownership and/or control of Indian entities to foreigners. As a result, foreign investments are expected to be increase, especially in the attractive retail sector.

Road Ahead

E-commerce is expanding steadily and retailers should leverage the digital channels, which would enable them to spend less money on real estate while tapping more customers in tier-2 and tier-3 cities.

Both organised and unorganised retail have to work together for better prospects of the overall industry, while generating benefits for customers.

Finally, the long-term outlook for the industry is positive, supported by rising incomes, favourable demographics, entry of foreign players, and increasing urbanisation. **PG**



The author has over 25 years of experience in FMCG and Modern Retail. He is on the selection panel of 'Hunar' skill centre (Retail and Hospitality), a collaboration between Delhi and Singapore governments. He can be reached at rakeshgambhir@imagesgroup.in

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