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INDIA EDITION

April 2017

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The linear journey of shoppers through the aisles of supermarkets is fast changing. Customers are now presented with myriad retail choices. They have the luxury of choosing one of the several channels available to them, depending on their convenience and mood. In addition, at any given time, there are other factors at play as well that play a role in coaxing shoppers to stores: their sense of comfort, urgency to purchase, paucity of time, ease of travel, or the desire for some shoppertainment.

Not surprising then that the bemused grocer is trying to gauge his customer's next move. Looking at the current phase of retail industry evolution, grocers have no choice but to offer both offline and online touch points if he wishes to remain competitive. The focus now is to build and grow the grocery business from a customer-centric perspective. This entails serving customers through multiple channels: Internet, telephone, home delivery, mobile vans, catalogues, kiosks, etc.

Today, more than ever before, the customer is dictating the route he/she wants to do business in, and grocers are quickly adapting. They are putting in place systems and processes that can facilitate the customer's shopping experience. By using a combination of online and offline channels, they are able to leverage the unique benefits of each channel to attract and satisfy their customers.

The growth of alternate retail channels is also compelling brands and retailers to devise their marketing strategies around these retail formats in addition to the conventional brick and mortar retail channels. Over the next few years, it is expected that intensifying competition will drive grocers to innovate further in order to remain closer to their customers.



**Amitabh Taneja**  
 Editor-in-Chief

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# Riding the health and nutrition bandwagon

Ajay Mimani, Director, Ganesh Products Pvt. Ltd - known for their Indian health drinks like kesaria thandai and fruit juice based sharbats – speaks to Rohan Narayan about the growing popularity of his products in West Bengal, Bihar, Odisha and Rajasthan and his retailing strategy for deeper penetration in these markets.



**We have seen a very good response for our products in satchet and apart from the rural market, quite a lot of demand is seen coming from Indian Railways, hotels, airlines and so we have had to change our packaging strategy to meet the rising demand.**

—Ajay Mimani  
Director, Ganesh  
Products Pvt. Ltd.

## Tell us about your products.

We are mainly in the MSME sector and based out of Kolkatta. Most of our focus is on fruit-based products, which are made directly from fruit pulps and fruit juices. Our product portfolio is wide: sharbat, thandai, fruit crush (twister), fruit squash, mango panna, pickle, jam & jelly, kasundi and chutney, gift pack gulab and kewra jal. These products are made with herbal and nutritious ingredients like cardamom, rose water, poppy seeds, cucumber seeds, white & black pepper, saffron, cardamom powder and citric acid, etc. These products compete with the best in their respective categories in the region.

## Which are your major markets ?

The main market for our products is West Bengal, but our products are also sold widely in Rajasthan and Odisha. Our top-selling products – Thandai & Kesar syrup – are a major hit in Rajasthan and Odisha and so we are now focusing on further expanding our presence in these two states. Our target consumers are different for each of our products. Thandai and Kesar syrups are for the upper segment of consumers and are mostly used on special occasions like weddings and other big ceremonies. For our sauce and pickle sachet, costing Rs. 1 or Rs. 2 and for our other products in smaller packets costing Rs. 10, we are targeting people in rural areas because we see a huge consumption of such products in the rural market.

## How is the demand growing your products?

We have seen a very good response for our products in satchet and apart from the rural market, quite a lot of demand is seen coming from Indian Railways, hotels, airlines and so we have had to change our packaging strategy to meet the rising demand. Initially, we used to manufacture in bottles but seeing the demand we decided to launch the products in smaller sachets



at a more economical rate. There is a huge scope for business in these sectors.

## How are you staying ahead of competition?

Every year we are launching new products and diversifying. Seven years ago, we had only Sharbat in our product range, which was a seasonal product with peak demand lasting 4-6 months. Then we brought in beverages like thandai. Then we introduced our fruit crush, which are related to some mocktails but are essentially seasonal. So we embarked on launching products that have year-round consumption. We launched sauce with a wider range as we saw a big scope of business opportunity in this product. Last year, we started manufacturing tomato sauce range, vinegar, and soy sauce. Recently, we have launched tomato sauce in sachet. Now we are launching sachets of pickle, tomato sauce, mustard and chili sauce in Rs 1 packs. We see a good volume of business in Rs. 1 sachet. In the coming six months we are planning to launch different mocktail ranges like Moulin syrup, which is now imported from France and is widely used in the five star hotels. We plan to start manufacturing it from June onwards. We have already completed our R&D process but due to demonetization, the manufacturing was delayed. **PG**



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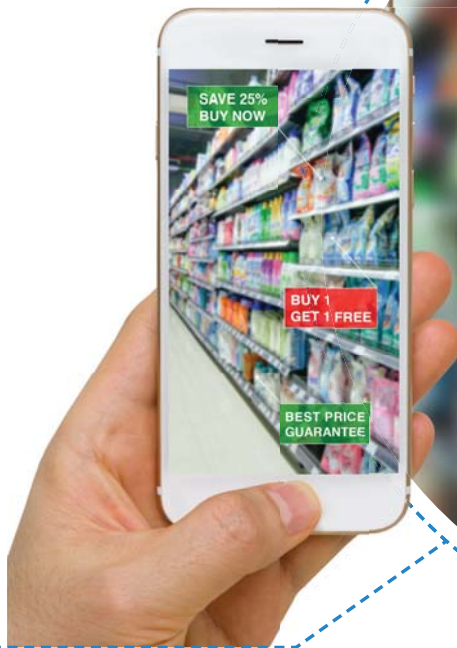
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## Trends and practices in omni-channel retail

Omni-channel has opened a bagful of omnipresent opportunities for retailers. This year will continue to see the benefits from omni-channel solutions and retailers will travel further ahead in the direction of phygital retail.

By Sunil Bajaj

**T**hriving in intelligent digital ecosystems, omni-channel retail is benefitting businesses and customers alike. Let's look at the omni-channel retail trends of the current year.

**Omni-channel retail, no matter how big the concept, still is in multi-channel state mostly connecting two or three devices (web, mobile, store). But it soon will need to grow and get accustomed to the increasing number of connected devices.**

**Mobile first:** Hand-held devices will keep ruling the market. So your omni-channel retail strategy needs to be mobile first. Mobile shopping, mobile payment, and even addressing customer grievances on mobile is the need of the hour. Customers want to walk into your shop, browse, add to their mobile carts and pay through payment options available on the mobile. The smoother your customer journey is on the mobile platform, the more you gain out of your cross-channel retail strategy.

**Smarter shops:** Brick and mortar is one of the most important aspects of omni-channel and multi-channel retail. Even after the development of connected devices, customers have not outgrown the habit of shopping in physical stores, though their expectations have risen for the seamless experience. Stores, kiosks and mPOS will become smarter and customer friendly. Once a customer shops with you, they expect you to know about their preferences and history of purchase. Smart shelves, mPOS and AR (augmented reality) will be some of the big omni-channel retail trends in 2017.

**Connected devices:** More and more connected devices are emerging every day. Smart fridges send alerts if the milk carton is empty and smart washing machines diagnose problems and send text alerts about solutions. Omni-channel retail

solutions connect the customer's grocery lists to shop's smart shelves, directing customers to the products on their lists. They no longer need to stand in queues to pay their shopping bills as the solution is connected to the POS and an e-bill is generated, which the customer can pay in whichever mode is convenient.

**Enhanced customer experience:** The more effortless the customer journey from order to delivery and return policies, the more you gain from omni-channel retail strategy. With advanced machine learning, businesses will be able to provide better customer experience using chatbot and other artificial intelligence.

**Smarter touchpoints:** Customers are expecting retailers to catch up with the smart technology trends. Seamless integration of touchpoints becomes a necessity gradually. Providing targeted offers and personalized recommendations are among the inescapable omni-channel retail trends currently.

Going ahead, we will see businesses partnering up with various service providers for better customer experience, order delivery and better tracking. Personalization will get intensified and will have lesser scope for 'choice fatigue', offering only the best options. The coming months ahead will see omni-channel retail outgrow multi-channel retail and become more potent in customer engagement. **PG**



The writer is Director-Retail & CPG Practice, Aspire Systems, an IT and software firm offering cost-effective phygital retail solutions for taking omni-channel retail to the next level.



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# Food for tomorrow - the growth areas for brands

Health and wellness foods are the emerging trends in Indian food sector. The phenomenal growth achieved by Patanjali and Sri Sri Products is a testimony to this. However, much more needs to be done to expand this market through multichannel business models.

By Ritusmita Biswas



“  
Consumers are willing to experiment with health food but the high pricing is the biggest hurdle and we need to overcome to develop this segment.”

— Krish Iyer  
President & Chief  
Executive Officer,  
Walmart India

The Indian retail sector has now come of age, constituting 26% of the national GDP. In recent years, the food retail sector has registered significant growth. Apart from the impressive growth rates, it is one of the fastest evolving sectors in the country because of the rapidly changing food consumption habits and preferences. It is therefore important for the players from India's food & grocery retail and foodservice industry to understand the fresh set of emerging consumer demands, the shifting consumption trends, how fast the industry can grow and what challenges need to be overcome.

With improved standards of living, changing lifestyles, increasing spending power, constraints of time, health consciousness and a higher need for convenience and simplicity in food preparation, there has been a perceptible change in consumer preferences. Some key trends to emerge out of these developments are:

- A growing preference for health and wellness foods
- A preference for ready-to-cook food
- A willingness to experiment and food adventurism
- A preference for organic food products and authentic ingredients
- A preference for all things indigenous and local sourcing

“At a time when more and more consumers are shifting to ready-to-eat food items, we need to tap the sector to ensure they get health food,” says Mohit Kampani, CEO, Aditya Birla Retail.

According to Nandan Reddy, Co- Founder, Swiggy, “The dependency of the urban population between the ages of 25 and 35 to cooked food that is delivered at home has increased drastically. Also, consumers are experimenting with newer cuisines. Overall, the country's palate is evolving and people

are willing to discover different food with health as the main criteria”.

“People want to lead a cleaner and better quality of life and it is reflecting in the changing outlook toward food, with the focus shifting to healthy foods. Consumers are beginning to demand information about the purity and authenticity of ingredients and are demanding greater transparency in food labelling. At the same time, the current generation has more sense of pride in being Indian and they see a lot of merit in ancient Indian food traditions and practices. Apart from giving rise to a sense of pride in Indian food, the authenticity of ingredients has suddenly become the core issue,” opines Jamshed Daboo, MD, Trent Hypermarkets.

Arvind Varchaswi, Trustee, Sri Sri Ayurveda Trust, and Group Advisor believes that Indian food consumers are relying a lot on traditional knowledge to see how they can change their lifestyle and that's where Ayurveda has a lot of solutions. “The challenge is to make healthy foods taste good. If we can get that balance right then it's a recipe for the health food sector to grow even faster. Also purchasing food has now become an experience and not a mere activity. Consumers are highly educated and they know exactly what they want and choose accordingly. Food retailers should create more avenues for giving the customers the control to personalize their experiences, based on their needs and wants”.

“Consumers today recognize the consequences that certain food choices have on their health and are choosing their foods accordingly. The urban Indian consumer is looking at a holistic combination of good food habits and healthy lifestyle habits as a way to balance their hectic schedules. Food products that are more natural, free of additives, are fresh and have authentic ingredients in them are bringing back that balance in their lives. The growth that Patanjali, Sri Sri and Ayurveda are seeing today is more about



“

**I see a good opportunity for Indian manufacturers, particularly in MSME formats to make more food in the health formats locally.**

— **Mohit Kampani**  
CEO, Aditya Birla Retail



“

**The country's palate is evolving and people are willing to discover different food with health as the main criteria.**

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Co- Founder, Swiggy



“

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**The challenge is to make healthy foods taste good. If we can get that balance right then it's a recipe for the health food sector to grow even faster.**

— **Arvind Varchaswi**  
Trustee, Sri Sri Ayurveda Trust, and Group Advisor



“

**Consumers today recognize the consequences that certain food choices have on their health and are choosing their foods accordingly.**

— **Devendra Chawla**  
Group President, Food and FMCG Brands, Future Group

getting that authenticity back in their processed lives,” said Devendra Chawla, Group President, Food and FMCG Brands, Future Group and CEO, Future Consumer Ltd.

Mohit Kampani pointed out that the recent revelations regarding packaged food that were in the public domain has created a huge trust deficit among consumers, when it comes to packaged food. The upsurge of nationalistic sentiments and the strong consumer connect that exists with traditional products and services, including Ayurveda and the goodness of natural and herbal products and ingredients will see local sourcing getting stronger. “There is more trust in ‘organic’ or ‘locally produced’, and consumers perceive these products to have higher production standards and a greater sense of integrity and it is going to dramatically change how we source our products. So I see a good opportunity for Indian manufacturers, particularly in MSME formats to make more food in the health formats locally,” he said.

While health and wellness has transitioned from a niche to a mainstream concept and there is immense scope for growth, the health foods market is still at a nascent stage in India. Also, health is not the only filter on food choices and there are many reasons as to why health food constitutes a relatively smaller base in the Indian food basket though its realisable potential is much higher.

**Challenges to the growth of health foods:**

- Prohibitive pricing
- Low market penetration

“India is too diverse a country to make a prediction for emerging food trends, but there is an increased propensity to experiment among the consumers. Though Ayurveda and healthy foods are catching on, health foods are still unaffordable to a majority of urban consumers. Consumers are willing to experiment with health food but the high pricing is the biggest hurdle and we need to overcome to develop this segment,” says Krish Iyer, President & Chief Executive Officer, Walmart India.

According to Jamshed Daboo, “While there is a growing clamour for health foods, their presence is very limited in the food space. Affordability is an important factor and until the affordability equation is resolved, it will hinder the growth potential. Secondly, there is no wider availability and because of the lower volumes, the price points are not holding and newer players are not coming into the market.”

But despite the constraints, food remains fundamental to consumers’ definitions of health and wellness. And at a time when consumers’ are redefining the value of food from the standpoints of price, taste and convenience to health, wellness, and safety, it will be important how the product is marketed, particularly on the shelves. “Manufacturers should focus more on how they can communicate the quantifiable health benefits of health foods through proper labelling with easily understood nutrition and ingredient information and by innovating on shelving strategies,” points out Mohit Kampani. **PG**



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# Mixing it Up

Strategic merchandising can drive occasion sales for innovative snack products.

By Jim Dudlicek

“We are seeing spicier flavor innovation capturing the Millennial consumer, and we’re giving our teen consumers new ways to challenge themselves with extreme options like Habanero.”

— Adam Beane  
Conagra Brands

It’s no secret that snacks are meals now. Changing consumer habits have transformed the old 21-meals-a-week model into 14 meals plus 14 to 21 snacks, as Leslie G. Sarasin, president and CEO of Arlington, Va.-based Food Marketing Institute (FMI), noted at the trade group’s recent Midwinter Executive Conference, in Scottsdale, Ariz.

So, in their ongoing mission to turn center store from a drag to a destination, retailers need to tap the many opportunities within.

## Elite Meat

With strong growth in the trail mix segment and growing demand for protein snacks, combining the two shows great potential.

Meat-laced trail mixes are gaining traction, Chicago-based market researcher Mintel notes in its June 2016 “Nuts, Seeds and Trail Mix US” report. “These products frequently contain high-protein claims and simple ingredients, both of which are especially important to consumers,” Mintel notes. “Strong innovation in the trail mix segment, including segment-blurring products like meat snack trail mix, will help the segment evolve.”

Mintel does acknowledge that current interest is low due to their niche nature, but strategic positioning of products from several companies could boost trial and usage. Among them is disruptor Dick Stevens, which claims to be the first brand to combine jerky and trail mix.

“Most of the category buyers we talk to are excited about our brand,” says Christopher Neil, VP of sales for Charlotte, N.C.-based Dick Stevens Jerky

Trail Mix. “We support our growth in the retail vein with in-store demos, temporary price reductions and advertisement, as well as through social media. This consumer engagement is vital with a new product.”

Dick Stevens Original Blend Beef Jerky Mix offers lightly seasoned beef jerky, raw almonds, macadamia nuts, cranberries and dried blueberries.

Because the product stands apart from the singular categories of jerky and trail mix, placement in either set is complementary, “generating add-on sales for each category,” Neil explains.

Other such products include General Mills’ Epic Hunt & Harvest Mix, combining beef or pork with nuts and dried fruits; Tanka Trail Turkey & Buffalo Jerky with Cranberries and Mango Pepper Trail Mix; and Oberto Trail Mix in Original Beef, Spicy Sweet Beef and Teriyaki Chicken.

With savory snack category sales projected to reach \$45.9 billion after 2.8 percent growth over the past five years, according to Euromonitor International, legacy brands are leveraging demand for protein snacks, like Jack Link’s, which has added pork, chicken and turkey jerkies to its lineup, along with Small Batch Bacon Jerky and trendy flavors like sriracha, and Conagra Brands’ Slim Jim Turkey Sticks in Original, Barbecue and Habanero flavors.

“We are seeing spicier flavor innovation capturing the Millennial consumer, and we’re giving our teen consumers new ways to challenge themselves with extreme options like Habanero,” says Adam Beane, Conagra senior brand manager, citing data showing turkey consumption has tripled in the past four years and that 40 percent of Millennials buy poultry to increase their protein intake. “We work with each

specific retailer to maximize their shelving efficiency as well as their consumer demographic.”

Meanwhile, the crew at Duke’s — the Boulder, Colo.-based craft meat snack arm of Thanasi Foods — says that all of its products, including Smoked Shorty Sausages and Grass-Fed Brisket Strips, can be described as protein-based snacking solutions.

“In a world filled with ‘me-too’ meat sticks and whole-muscle jerkies, we are disrupting the category,” asserts Brand Director Randy Gilbride.

Duke’s boasts small-batch production using pasture-raised beef, which responds to key trends, including demand for simple ingredients, craft products, meal replacements and, of course, protein.

“We have had a lot of success merchandising Duke’s with craft beer and other beverages,” Gilbride says. “We’ve also done cross-merchandising in deli, since our meats are more like snackable butcher meats versus typical meat snacks. We’ve cross-merchandised with lunchbox snacks and ... with cheeses and crackers for tailgate and party platter thematics.”

**Pit Stop**

With demand rising for healthy snacks, olives are continuing to catch on among snackers, thanks to pouch and cup packaging that ditches the unwieldy brine-filled jar for on-the-go convenience.

“Healthy snacking is outpacing the entire food and beverage market in sales growth, which gives our liquid-free olive pouches unlimited potential,” says Keli Roberson, marketing director for Hollywood, Fla.-based Gaea North America, maker of gluten-free, vegan and kosher snacking olives. “We’ve heard from moms putting them in lunchboxes, and adults grabbing them for a quick, healthy snack on the go. They also pair well with other healthy snack items such as nuts, cheese and hard-boiled eggs.”

Tracy, Calif.-based Musco Family Olive Co. has enjoyed similar success among adults and kids with its Pearls Olives To Go cup line since the item launched three years ago.

“We know that consumers view olives as a wholesome snack with multiple health benefits. This includes good fats, high antioxidants and vitamin E,”

says Dan Kelly, Musco’s VP of sales, noting that the company is “now developing a new olive snacking category to launch in 2018.”

Musco’s sales teams collaborate with retailers to develop snacking sections within the olive shelf set, Kelly adds. “It’s important for us to share our insights and research with retailers and optimize the shelf space,” he says. “We’ve done cross-promotional partnerships where there are synergies, such as cheese and produce. We are developing partnerships with other snack products to foster the idea of a snack regimen in consumers’ minds.”

**Chip Shot**

Innovation is also bringing health to traditional salty snacks, with companies like Lake Success, N.Y.-based Hain Celestial Group leading the way. Trumpeting claims like non-GMO, gluten-free, less fat and simple ingredients are brands like Garden of Eatin’, with its new Nacho and Ranch tortilla chips; Terra, debuting plantain chips; and Sensible Portions, which recently introduced Salt & Vinegar Stacked Veggie Chips, made from potatoes, sweet potatoes, carrots and pumpkin, in convenient on-the-go canisters.

“Our goal is to build awareness and drive trial at retailers through in-store activation such as sampling and couponing,” says Brett Hartmann, Hain Celestial’s director of marketing for snacks.

Minneapolis-based General Mills is driving trial of products like its Food Should Taste Good tortilla chips via digital coupons, FSIs, on-pack IRCs and TPRs. “Additionally, we provide out-of-aisle shippers that prominently display our product offerings and provide a little more context as to what the brand stands for,” says spokesman Mike Siemienas, opening up cross-merch opportunities with, say, avocados in the produce aisle or near the fresh salsa and spreads.

“Dipping is an engaged form of snacking and can include that fresh, colorful produce,” Siemienas continues. “This is also a great way to sample in-store and in different areas of a supermarket where you can bring different consumers into the aisle.”

Conagra is driving its own dipping solutions, creating a recipe that pairs its Ro-Tel Diced Tomatoes and Green Chilies with Avocados from Mexico, notes Matt Pabst, director of shopper marketing. “We’ve been working to give shoppers confidence in the kitchen,” he says, “by cultivating and sharing recipes that pair items from center store with items from the perimeter of the store, especially fresh produce.” PG



“We’ve done cross-promotional partnerships where there are synergies, such as cheese and produce. We are developing partnerships with other snack products to foster the idea of a snack regimen in consumers’ minds.”

— Dan Kelly  
Musco Family Olive Co.



From granola bars and nut mixes to pudding and popcorn, learn more about snacking solutions available to retailers at [progressivegrocer.com/snacking](http://progressivegrocer.com/snacking).

A photograph of Samir Modi, President of 24 SEVEN Convenience Stores, standing in a store aisle. He is wearing a dark suit jacket over a light blue checkered shirt. He is holding a small product in his hands. In the background, there are shelves stocked with various products, and a large illuminated sign that says "24x7" is visible. The lighting is bright, with several pendant lights hanging from the ceiling.

# The front-runner in per square feet retail sales

Samir Modi, President, 24 SEVEN Convenience Stores, is a buoyant retailer with fresh wind in his sails. After a sedate couple of years spent fine-tuning and tweaking his retail business, he is now limbering up and set to move the needle further in the convenience store format. The recently opened 47th outlet of 24 SEVEN in tony GK II, M-Block market, Delhi, embodies the chain's business philosophy of acting as a retail leader in the vanguard of latest technology adoption. "We have pushed the retail envelope further by launching a more cutting edge convenience store, which is a reflection of the world-class stores that we wish to create for the well-travelled Indian consumer," said Modi, during an interaction with Sanjay Kumar of Progressive Grocer.



**Samir Modi**  
President, 24 SEVEN

**W**ith the demand for a round-the-clock convenience store showing effervescence – be it for emergency shopping, a hop-in buying, or for impulse purchases – in urban metropolises, 24 SEVEN is gearing up to open 400 new stores in Delhi-NCR over the next two years. "We have the concept, the brand visibility, and our value proposition is crafted to create an International shopping experience with the convenience of round-the-clock availability of all needs and a unique mix of reasonably priced products in a shopping environment that prioritizes quality and hygiene," avers Modi.



**You have just launched a new store after quite some time. How would you assess the performance of your stores till date?**

The world over, the retail landscape is gradually moving away from the large departmental stores and supermarkets toward smaller stores located at every nook & corner. Globally, these stores are also known as the “Convenience Stores” and the core identity of such stores draws on three basic elements. First is their proximity (walking distance) to the catchment; Second is the fact that they are open round the clock; and the third and most important element is their unique product assortment, which essentially takes care of all “dusk to dawn needs” (all those products one needs from the time they wake up in the morning to the time they go to bed).

In India too we have stores that fit this description more or less. They are better known as “kirana” (mom n pop stores) shops, which are in abundance. But the format is under-developed and unorganized even though kirana shops offer great convenience.

This void was being felt over a long time and the gap was accentuated as consumers’ spending power increased and their needs began to grow even as the time on their hands to tend to the growing needs began to shrink. Other factors also came into play: A rapid increase in International exposure brought about by frequent travels and the pervasiveness of media; changing lifestyle & purchasing habits. The combined impact of all these factors created a huge demand for a “convenience store” model. By 2005, the market appeared ripe and tailor-made for this format, which is when 24 SEVEN Convenience Stores were launched and have ever since pioneered this concept.

Our business model was designed around the winds of change to begin with. So we launched and tested four stores in the first year. Over the next few years the model was tweaked to get the product assortment, services, look & feel of the stores in line with the international standards back then. To offer an international shopping experience, our stores

came with a modern look and ambience in terms of design, shop fit outs and equipment. In 2012, we got the platform ready for the first set of expansion of this profitable “convenience store” model and opened 45 stores in a span of two years.

This year, we have pushed the envelope further by launching a more cutting edge convenience store. Last month, we launched the new and improved cutting edge 24 SEVEN store at GK II, Delhi. The store embodies our business philosophy of acting as a front runner and an early adopter of the latest technology in use world-wide. The new store at GK II is a reflection of the world class stores that we wish to create for the well-travelled Indian consumer. The response to the new store has been overwhelming but it will not make us complacent in trying out even more innovation in terms of technology in the near future.

**In your view, what do you consider the pros and con of your format over the others?**

**a) Pros**

- Open 24 hrs, 365 days
- Fulfillment of all daily needs from dusk to dawn
- Assurance of quality & freshness
- Quick check outs
- Unique assortment

**b) Cons**

- Space is a constraint therefore limiting depth (choices) in categories
- No space to stock products. As space is limited, the focus is on offering fresh products to customers
- High warehousing & delivery cost

**What is the location strategy for your stores?**

We follow our customers and the demand for a round-the-clock convenience store can be seen almost everywhere today. We adopt and choose the locations in high footfall areas or busy markets. Our shops are conveniently located on the ground floor with a clean and large façade. Our customer must

**We stock complementing products together for the ease of consumers and follow “Tanpin Kanri” to replace slow movers with more sought after products regularly.**



## 24 SEVEN: Vital Stats

- ➔ **Retailer/ Brand Name:** 24 SEVEN Convenience Stores
- ➔ **Launch Year:** 2005
- ➔ **Parent Company:** Godfrey Phillips India Ltd.
- ➔ **Company Headquarters:** New Delhi
- ➔ **Operating Structure:** Company Owned Company Operated
- ➔ **Type/Format of Store/s:** Convenience format
- ➔ **Average Size of Store:** 700 sq.ft.
- ➔ **Total Number of Outlets (as of 31st March 2017):** 47 stores
- ➔ **Total Retail Space:** 32,678 sq. ft.
- ➔ **Presence in Number of Cities:** NCR & Chandigarh
- ➔ **Distribution of Outlets in Cities:** Delhi: 32 | Gurgaon: 3 | Faridabad: 2 | Noida: 6 | Ghaziabad: 1
- ➔ **Annual Turnover:** INR 182 crore
- ➔ **Average Sales/sq.ft.:** INR 152
- ➔ **Same Store Sales Growth:** 25.7%
- ➔ **Average Footfall per day in a Store:** 1,170
- ➔ **Average Bill/ Ticket Size:** INR 350
- ➔ **SKU Count in your Store:** 3,000
- ➔ **Number of Employees:** 500

be able to access our shops within convenient travel time – ideally under seven minutes. The operating hours must be such that the shopper can shop at our outlets as per his/her convenient time.

### What is the typical customer profile at your store chain?

The customer profile varies and depends on the location and demography of the store. But broadly speaking, our customers are in the age group 18 to 35 years. Most of them come to the store for making an unplanned purchase, live busy lives and

are time starved. Our stores get shoppers returning from pubs at night, and are frequented by tourists, BPO staff, students and college goers. In short, we complement the lifestyle of young on-the-go adults, party animals, those who love night-life, and nuclear families who prefer quality and hygiene over price.

### What is the major customer and value proposition of your store format?

We have the concept, the brand visibility, and most importantly, there is demand for round-the-clock shopping, be it for emergency shopping, a hop-in option, or for impulse purchases. Our value proposition is built and designed to serve and delight our core target audience. This value proposition is crafted to create an International shopping experience, convenience of round-the-clock availability of all needs, unique mix of products (most sought after imported products, high in demand domestic brands and high quality food from world-class facilities, apart from stocking reasonably priced products in a shopping environment that prioritizes quality and hygiene.



### On the topic of products and creating a delightful shopping experience, what is your strategy for merchandise display?





We place the right product for the right customer at the right place. Since we operate a very concise format, we choose our products carefully and logically. The new arrivals and seasonal “must buys” are communicated effectively to ensure the offtake of these products. We stock complementing products together for the ease of consumers and follow “Tanpin Kanri” to replace slow movers with more sought after products regularly. Tanpin Kanri or “management by single product,” is an approach to merchandising pioneered by 7-Eleven in Japan that considers demand on a store-by-store and product-by-product basis. Essentially, it empowers store-level retail clerks to tweak suggested assortments and order quantities based on their own educated hypotheses.



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**How would you describe the relationship between the assortment size and category sales at your stores?**

Our stores' sales constitute predominantly of products meant for immediate consumption; and thereby the pack sizes are portioned for individuals. Other products at the store are also available in smaller packs.

**At your stores, which department in particular draws in the highest traffic and transactions? Overall, how much is its sales/revenue contribution?**

Fresh Food and Beverages lead the mix with a 18% contribution to sales, followed closely by imported products at 16% contribution. The food and non-food categories in our stores comprise fresh food, groceries, vegetables, RTE (ready to eat) meals, frozen food, beverages, imported products, OTC pharmaceuticals, personal care products, travel accessories, toys, music, movies, magazines, and some more.

**What marketing activities do you undertake to pull in more customers?**

We have registered same store growth of 25.7 per cent, which indicates that customers to our stores have been voting whole-heartedly with their feet and wallet. To keep our customers engaged, we undertake in-store marketing initiatives, and varied other activities such as introducing new products every month, festival-based promotions, annual event called Happy 24 SEVEN Day, and distribution of promotional material to engage more and more customers.

**Which have been the successful instances where you have partnered with brands to grow specific categories or create sales traction for particular products?**

There have been multiple such instances where we have partnered with brands. Such collaborations

**We forecast consumption, discuss targets and give regular feedback on the product movement to suppliers, which help both the parties to keep a check on fill rates and chalk out the future plans.**



have been a win-win for both of us. A recent example of such an association has been with Ocean Drinks, wherein we were the launch partners for the beverage and continue to be the No. 1 retailer for the brand.

**What initiatives and technology innovations have you made to make the customer experience at your store more fulfilling and delighting?**

In order to delight customers we have introduced several innovations blended with nostalgia in the F&B offerings at our stores. For instance, we have introduced 'shadi wali coffee' and 'Shake Shake', which is a concept of preparing fresh traditional chakhna as well as French Fries with a choice of more than 20 toppings. Also, we have introduced technology upgrades to communicate better with the customers. Our stores have LED displays that help us to update and communicate offers and information in real time. Speed is the underlining thing when it comes to check-outs at our convenience stores and we have adopted the latest technology from around the world to speed up and streamline front and back-end operations. We focus unremittingly on improving customer service at the front-end, and have a training programme to enhance customer service and customer interaction. For new recruits, we have a dedicated training centre attached to an active 24 SEVEN store for hands-on training. Our staff also attends grooming and etiquette sessions.

Similarly, for our back-end operations, 24 SEVEN's entire supply chain operations (logistics included) are managed by a third party logistics (3PL) service provider. Thanks to our back-end innovations, we have managed to keep both pilferage rate and damage expiry rate at less than 0.3 per cent, thus achieving greater supply chain efficiency. Our employee







**With your experience in managing convenience stores, what do you feel are the most essential attributes for ensuring sales and profitability?**

In order to succeed in this business and with this format, you need to ensure high quality F&B offerings, product assortment, 24 hours operations, relentless staff commitment and the vision to be the best-in-class, not only in India but globally.

**What are your observations about the changing buyer behaviour that we all love to talk of?**

Consumers are defined by their needs rather than their categorizations. We house a wide range of product categories and provide various services for the convenience of our customers who are working families, nuclear couples, individuals, housewives, teens and night owls. With the growth and spread of the organized modern trade in urban areas, the buying habit of the modern day consumer has definitely undergone a perceptible change. The market has become consumer-led. Today, modern retail formats allow the consumer to analyze the product at closer range and compare it freely with other substitutes and alternatives, leading to a higher product awareness and wider choice availability. With larger discount schemes and rising disposable income, consumers tend to hoard a larger quantity than required, leading to forced consumption. Ready-to-eat meals and snacks have been witnessing double digit growth year on year. Convenience is the key to the success probability of products too. Apart from RTE, demand for various services has risen drastically.

**We have registered same store growth of 25.7 per cent, which indicates that customers to our stores have been voting wholeheartedly with their feet and wallet.**

management system runs on PeopleSoft enterprise resource planning (ERP) software. Some years ago, we introduced SAP ERP technology for store operations. We want our stores to be the preferred choice of modern and busy consumers seeking round-the-clock convenience of shopping in a conducive and friendly environment. As such, products, supply chain, technology and marketing remain our key focus areas.

**How much investment goes into setting up a 24 SEVEN store and what time does it take to break even?**

The total investment is about INR 1.20 crore, and break-even happens within a year.

**Tell us about your sourcing strategy and supply side management.**

We work with our suppliers closely and treat them as business partners rather than just vendors. We are in this business together and so success or failure is also mutual. Our suppliers and vendors know their product well and we know our customers. There have been instances where we have customized products and deliveries to meet our customer needs and helped close the gaps. We also believe in total transparency in operations. As such we forecast consumption, discuss targets and give regular feedback on the product movement to suppliers, which help both the parties to keep a check on fill rates and chalk out the future plans.

**How would you describe your best achievements so far?**

We have been the front-runners in terms of per sq.ft. sales in the retail format and have seen a double digit growth in same store sales growth for the past five years. We have won the Coca-Cola Golden Spoon Award thrice in a row for clocking the highest per sq.ft. revenue in the retail format.

**What are your plans and goals for the future?**

We are targeting to open 400 stores in the next two years with an investment of approximately INR 500 crore.

**Any advice you would like to give to aspiring grocery retailers?**

To aspiring modern retailers I would say: do not overburden yourself with increased inventory. Limit it to the number of credit days if not 33 per cent of it. Focus on select consumer groups instead of joining the rat race trying to please all consumer segments. **PG**



# Innovation in creating unique blend masala mix

Gaurav Gambhir, Founder Director, Shubh Food Products, speaks to Progressive Grocer about his company's spice business and its recent innovation in developing a new masala-mix product.



**Our products are absolutely chemical-free, preservatives-free and 100% natural. The core of our products is their unique blends for regional taste**

— Gaurav Gambhir  
Founder Director, Shubh Food Products

## Tell us about your company and its products.

Shubh Food Products is an ISO 9001:2008, 22000:2005, HACCP, FSSC 22000 certified company. It has been in the *hing* business since inception. We started off by supplying bulk *hing*. A few years ago we started contract manufacturing (private labelling) for companies like D-Mart (Premia), Aditya Birla More (Kitchen Promise), Walmart (Members Mark), Reliance (Good Life), and some more like Nilons in Pune and Spencer's in Kolkata.

We have now come out with 'Tadka Blast' – our own branded masala mix – and added another line to our business. The product has been developed keeping in mind that India is a complex 'taste' market. Every region has its own profile of preferred taste. That is why a lot of rigorous research has gone into developing this innovative product.

## Which consumer segments and demographics are your products targeted at?

In India, people's food and taste preferences change every 300 kilometre. In such a diverse country, we ensure that everyone's requirements are taken care of. For instance, when selecting the recipes of asafotida (*hing*), we ensure that regional tastes are given due consideration. Similarly, our new product Tadka Blast has been exclusively designed taking into consideration the demographic preferences of India. We are launching three variants of the product to cater to diverse markets such as those in Maharashtra and north & south India.

## How would you describe the competitive USP and differentiators for your products?

Our products are absolutely chemical-free, preservatives-free and 100% natural. The core of our products is their unique blends for regional taste.

## What factors responsible for driving the demand of your product?

Our product is one of the base ingredients used in Indian cuisine. This fact alone makes a huge difference to its growth prospects. The product's consumption trend will either stay stable or will grow further! The current market size of *hing* is approximately Rs. 300 crore.

## How do you ensure the consistency and quality of your product?

We are completely focused on quality. Each batch of our product is tested in a laboratory to make sure it has 100% compliance to FSSAI requirements. Today's customer understands quality and is not afraid to invest in a good quality product. I think this is the reason our products stand out from the rest.

## Talking of your new product, which are the features consumers strongly identify with?

Tadka Blast is a product specially designed for the new generation. It's very easy to use and a perfect ingredient that working women will enjoy using. We are absolutely confident that the product will be a huge success both in the Indian market as well as overseas.

**What are you doing to promote your product by way of branding, advertising and other promotional strategy?**

Our promotional efforts are geared toward connecting with the customer, which is very important. We believe in reaching the end customer of our products directly.

**Can you throw some light on your product's sourcing, packaging and labeling features?**

Shubh Food Products, being a FSSC 22000 company, has very stringent procedures for the sourcing of raw material and packing material. We have our own 95% automatic plant. The packing quality of our products is the best in class.

**What are your plans and targets for the future?**

As a contract manufacturer of asafoetida for a majority of retail chains in India, this business is growing 40% every year. Now we are looking forward to working with International retails chains in Dubai & USA.

Our new venture – Tadka Blast – attracted a very good response at Aahar this year and was widely



appreciated as an ideal product for modern-age cooking and one which would go down very well with the new-age consumers. We are targeting to launch this product in 19 countries in next 24 months. By next year, we plan to launch another new product, Spizzy, which will be India's first masala spray (Patented product of Shubh food products).

With such innovative products launches in the pipeline, we are targeting a turnover of INR 120 crore over the next three to four years. We are looking to join hands with good investors and I am confident that that our products will lead the spices industry soon. **PG**

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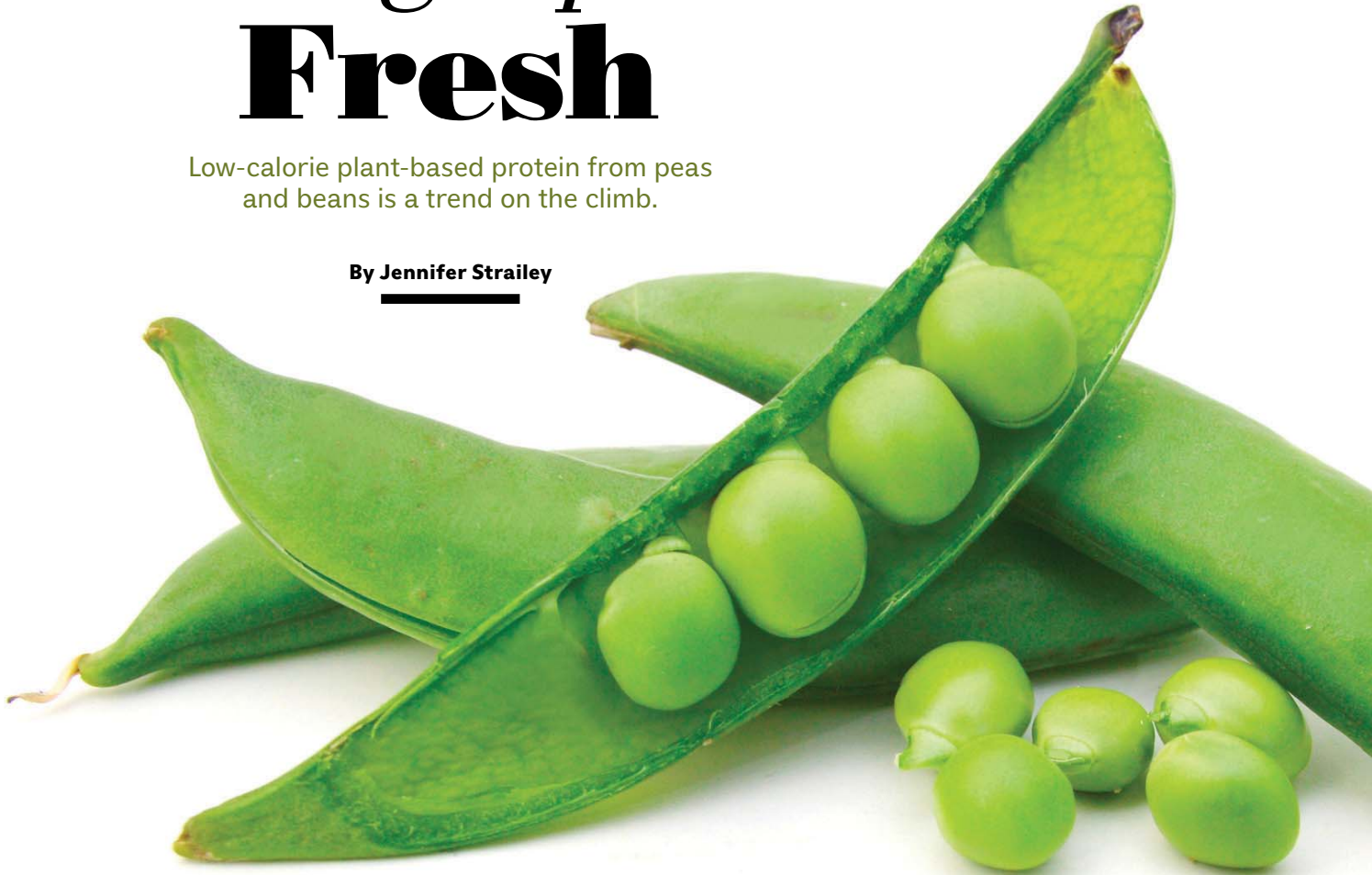
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# Filling Up on Fresh

Low-calorie plant-based protein from peas and beans is a trend on the climb.

By **Jennifer Strailey**



**H**ealth-conscious consumers are increasingly turning to plant-based protein to fuel their bodies with fewer calories and fat. What's more, foods like peas, beans, legumes and pulses use less water than other protein crops, making them a sustainable choice.

With 8 grams of protein and just 117 calories per cup, peas are a small but nutritionally mighty vegetable to watch. The Hartman Group, in Bellevue, Wash., which tracks emerging food trends, has identified pea protein as "a key player in the 'less meat,' 'soy-free' movement."

Meanwhile, pulses, which are beans and peas, including lentils and chickpeas that are harvested dry, are receiving acclaim on the global stage. Citing the nutritional benefits, affordability and sustainability of pulses, the United Nations General Assembly has declared 2016 the International Year of the Pulses (IYP).

## Snacks With Benefits

Pulses, the edible seeds of legumes, are also cause for celebration at Harvest Snaps, the line of produce-based shelf-stable snacks from Calbee, which are often merchandised in the produce section.

"There are a lot of benefits to eating plant-based protein," asserts Steve Kneepkens, VP of sales and marketing for Fairfield, Calif.-based Calbee North America, "but you can talk about protein all you want; the product has to taste good or people won't buy it."

Calbee is extending its line of Harvest Snaps Snapea Crisps and Lentil Bean snacks to include two new flavors: Harvest Snaps Black Bean Mango, Chile, Lime and Harvest Snaps Black Bean Habanero. Both flavors are launching this month.

"We went with bolder flavors in an effort to bring more men into the category," reveals Kneepkens, who adds that currently 55 percent to 65 percent of Harvest Snaps' customer base is female.



## North Carolina is Snap Bean Country

According to the North Carolina Department of Agriculture & Consumer Services (NCDA&CS), the Tar Heel State harvested some 4,300 acres of snap beans, with a value of more than \$6.5 million, in 2014.



“This year, the harvest looks very good,” asserts NCDA&CS’ Kevin Hardison. “Growers report that we have had enough wet weather to fill the pods and size the beans,” he adds. “Yields are looking to be average, if not better than previous years.”

The only concern for this season, notes Hardison, is a slight increase in pod-tip rot because of more wet weather than usual. While this year could see a higher incidence of rot, it’s not expected to affect yields or the marketability of the crop.

At least 60 percent of each product in the Harvest Snaps line is made from beans, pulses or legumes. To communicate the benefits of these plant-based foods, the company is preparing to release a white paper on sustainable plant protein.

It’s also revamping its website, [www.harvestsnaps.com](http://www.harvestsnaps.com), in time for the back-to-school season this September. “We’ll offer education on why proteins from better-for-you pulses are important, as well as tips of the day for better living,” explains Kneepkens about the site, which will also feature Pierre Legume, a new character to appeal to kids.

“There will be a big social element to our digital web page as well, where people can share fitness and health-and-wellness stories,” he continues. “We want to be right in the center of better-for-you living.”

### Lunchbox-ready

Convenience is key when it comes to encouraging consumers to eat beans as a snack or side dish. Pero Family Farms, in Delray Beach, Fla., offers two green bean packs that are healthful and easy to pop in a lunchbox.

Green Bean Organic Snack Snips feature organic green beans cut in bite-size pieces and accompanied by organic ranch dip, while Green Bean Snack Snips with Greek yogurt ranch dip have just 40 calories per serving.

### From Fine Dining to Healthy at Home

Southern Specialties, in Pompano Beach, Fla., has been growing and importing French green beans for more than 25 years, and so has seen the evolution of its product from a specialty item in white-tablecloth restaurants to a nutritious and delicious veggie for everyday dining at home.

“Today, French beans are still sought after by consumers who are interested in having a flavorful, nutritional product that has great appearance on the plate,” says Charlie Eagle, VP of business development, regarding Southern Specialties’ Southern Selects hand-trimmed beans.



**You can talk about protein all you want; the product has to taste good or people won’t buy it.**

— Steve Kneepkens  
Calbee North America

Featuring just 31 calories, one cup of green beans contains 2 grams of protein, and vitamins A, C and B-6, as well as iron and magnesium.

To further entice time-strapped consumers to get more French green beans in their diets, Southern Specialties offers a convenient 8-ounce microwavable bag and a 1-pound bag, as well as a 2-pound bag with a handle that plays well in club stores.

“Our increasingly extended line of microwavable 8-ounce Southern Selects French beans, yellow beans, English peas and sugar snap peas has been very successful,” notes Eagle. “Customers really like the convenience factor.”

When it comes to sugar snap peas, which are a popular snack item and a versatile ingredient, he observes that families are gravitating to larger-format packaging.

Attracting specialty bean and pea shoppers doesn’t only boost the produce department’s bottom line, adds Eagle: “We recognize that consumers who purchase French beans and other specialties also typically buy more expensive cuts of meat or seafood, cheeses, and wine, which means a higher basket ring.” **PG**

# Holly Jolly Noshing and munching

Snacks are among the fastest and most convenient forms of consumption. Not surprising then that snacks are replacing many traditional meal occasions. With most snack categories experiencing strong sales growth in recent years, the outlook for the category is going to be strong. Analysts predict that long-term growth in snacks will be due in large part to greater experiences, a growing grasp of whole-ingredient nutrition, portability and miniaturization of solutions.

**By Premjit Mohapatra**



**T**oday, more than ever before, eating occasions are now overwhelmingly linked with snacks. Be it ready-to-eat popcorn, veggie chips or nuts, snack items considered better-for-you options are driving sales growth in snack food categories. Analysts attribute this trend to the rise in urban population, increasing per capita income, busier lifestyles, higher disposable income and need a need for convenience arising out of the fast-paced lifestyles and a growing cultural tradition of snacking between meals. Over the past two decades, snacks have found high acceptance across large and small cities to become the preferred choice for consumers. According to Ranjana Sundaresan, Senior Research Analyst, Mintel, “During 2011-15, the retail snack food category grew at an annual rate of 20.5% by value and 12.3% by volume and the category is projected to grow at an annual rate of 18.0% by value and 13.3% by volume in the 2016-20 period.”

According to research commissioned by Mintel, snacking is pretty much an established trend for Indian consumers. About 75% of adults aged 18-64 said they snacked at least once a day. Among younger adults – those in the 18-34 age group – 77% said they snacked once a day. This dropped slightly to 73% for adults aged 35-64 years. According to Mintel’s data, India’s organized snack market was worth INR 197.8 billion in 2015 and it should only continue to grow as India is one of the fastest growing economies in the world. According to Mintel, the major product segments within retail packaged snacks category includes:

- Chips, which includes primarily potato chips
- Snack Nuts, which includes packaged nuts intended for immediate consumption
- Other Snacks, which includes potato-based snacks, rice-based snacks, corn-based snacks, popcorn, fruit snacks/jellies among others. Other Snacks also covers a large variety of branded and packaged traditional snacks, including but not limited to mixture, chivda and banana chips.

As per Mintel’s Global New Products Database (GNPD), Other Snacks, which is the largest segment, accounted for 70% by volume and 61% by value of the retail snacks market in 2015. Chips followed, accounting for 34% by value and 27% by volume. Snack nuts accounted for 4% of volume sales and 6% of value sales. This segment saw the highest volume of growth between 2014 and 2015, at 22%. In 2016, in terms of new products, nuts led the overall snack category with 21% of launches.

With the entry of major players like PepsiCo India Holdings Pvt Ltd, ITC Ltd, and Balaji Wafers Pvt Ltd in the snacks category, salty snacks have grown tremendously over the past decade. The introduction of brands such as Lay’s, Uncle Chipps, Bingo! and

Balaji within potato chips and brands such as Kurkure, Cheetos, and Bingo! within puffed snacks have proved to be a huge hit among consumers. According to market researcher, Euromonitor International, salty snacks is the largest selling snack product in terms of retail value sales with a contribution of 55%-58% of total value sales within snacks in India. It is also the largest in terms of volume share. About four years ago, packaged namkeen had replaced Western snacks such as potato chips and finger sticks as the largest segment within branded salty snacks market. According to Manoj Gupta, Executive Director, AFP Manufacturing Co. Pvt. Ltd, “In the last four years, Indian namkeens have grown at faster pace @ 24-25% as compared to Western snacks @ 12% overall.” AFP, which has over two decades of experience in manufacturing snacks ranging from moong dal, namkeen mixture, aloo bhujia, sweets, bakery, kaju mixture and extruded snacks, is also one of the leading players in the Private Label category that has served some of the top snack players like Lehar Namkeens, Bharti Walmart and others.

#### Demand Accelerators

**Innovative products & variants:** The Indian snack market has always been known to surprise and delight



**During 2011-15, the retail snack food category grew at an annual rate of 20.5% by value and 12.3% by volume and the category is projected to grow at an annual rate of 18.0% by value and 13.3% by volume in the 2016-20 period.**

— Ranjana Sundaresan  
Senior Research Analyst,  
Mintel

Major snack categories in India and their sales growth

Sub-Category	2013	2014	2015	2016	Total Sample
Nuts	18.13%	18.56%	20.55%	21.38%	19.50%
Wheat & Other Grain-Based Snacks	12.96%	12.78%	11.94%	11.05%	12.27%
Snack Mixes	11.67%	12.59%	11.05%	11.30%	11.72%
Bean-Based Snacks	11.67%	11.78%	11.94%	11.10%	11.64%
Fruit Snacks	9.65%	10.52%	13.06%	13.65%	11.53%
Potato Snacks	8.96%	7.19%	6.55%	7.54%	7.59%
Rice Snacks	8.36%	6.74%	5.38%	5.65%	6.63%
Vegetable Snacks	4.68%	5.89%	5.38%	2.95%	4.83%
Corn-Based Snacks	3.15%	3.89%	4.12%	3.97%	3.76%
Hors d'oeuvres/ Canapes	3.39%	4.07%	3.56%	3.56%	3.66%
<b>Total Sample</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>

Source: Mintel



**In the last four years, Indian namkeens have grown at faster pace @ 24-25% as compared to Western snacks @ 12% overall.**

— **Manoj Gupta**  
Executive Director,  
AFP Manufacturing  
Co. Pvt. Ltd.



**By cutting down extra sugar, zero trans-fat, and cholesterol, we are making our products lighter and easy to digest, hoping to attract consumers from all age groups.**

— **Gobind Ram Chodhary**  
MD, Anmol Bakers

its consumers with innovative and great tasting offerings. The new flavours are inspired by the food culture and the fun spirit of Indians. By tweaking their product offerings to suit the taste of Indian consumers, snack brands have launched new variants of the products to cater to region-specific demand, which has widened the consumer base. “With more than 34 varieties of biscuits, Anmol Bakers provides its customers with a wide range of variety to choose from,” says Gobind Ram

Chodhary, Managing Director. Similarly Cornitos, one of the leading FMCG brands in the Indian snack market, which is operated by Greendot Health Foods Ltd, and which has been clocking an impressive 30% growth rate annually, has Nacho Crisp, a Mexican snack in International flavours to cater to the Indian palate, apart from ten other varied flavours of Nachos.

**Price points:** Adoption of low-cost pricing strategies to make the product affordable for consumers has also enhanced the consumer base for the category. “Price is a primary factor in snack purchases, particularly in rural areas, which tend to be characterized by lower levels of disposable income. Consequently, the affordability of small pack sizes plays an important role in stimulating demand in rural regions,” says Dilip Radhakrishna, Research Analyst – Packaged Food at Euromonitor International. Consumers are always tempted to shift their choices and preferences whenever new products are launched or various marketing and pricing campaigns of different brands are introduced. “Our unique propositions to our valued customers, matching with smart packaging and our price points (MRP Rs. 5 and Rs. 10 pack sizes) convince them to switch brands and get addicted to our savories,” says Manoj Gupta of AFP. Another brand meticulous to play along strategic price points is Anmol Bakers, which is among the seven leading biscuit and cookies FMCG brands in India. “Our biggest USP is affordable prices and our products are bought by all sections of consumers, taking Anmol to new heights,” says Gobind Ram Chodhary of Anmol.

**Product features and attributes:** Taste followed by health figures prominently as the factors influencing the choice of snacks by Indian consumers. As per Mintel’s research, almost one in three (29%) adults who snack said taste was their priority when it comes to choosing a snack followed by health, which was chosen by 25% of consumers. Products that get the elusive balance of health and indulgence right stands to gain the most. According to Avinash Tripathi, Category Head, Godrej Nature’s Basket, “Taste



is the most important criteria in the choice of a snacking product. Indian consumers are looking for snacks that are fresh, crisp and flavourful. Freshness is also one of the top criteria in choosing a snacking product. While nearly three-quarters of consumers wish there were healthier snack options, more than three in five agree that taste is more important than how healthy the snack is for them. So to keep the balance between Health & Indulgence is the mantra for success in snacking segment.”

### Emerging Consumption Trends

Healthier products are at the heart of the conversation around snacking, primarily due to the changing values of consumers. Being healthy is becoming an increasingly aspirational marker as consumers become more conscious about the food choices they make. Health-conscious snackers demand healthy, low fat, low calories, low trans-fat, organic, fiber rich, vitamin & mineral fortified snacks while others want exotic tastes and flavours. So the health aspect should be balanced with the demand for taste. According to Mintel Global New Products Database, snack food launches that claim low/no/reduced cholesterol grew by 22% between 2015 and 2016. Snack launches with high/added fiber grew 46%. “Health is becoming increasingly important for Indian consumers, and new product launches are increasingly highlighting their better-for-you credentials, such as in the form of the ingredients used or the nutritional benefits offered. Nearly a quarter of adult Indians who consume snacks say that they would be willing to pay extra for lower calorie content snacks,” says Ranjana Sundaresan of Mintel. With increasing consumer health-consciousness shaping demand, one can expect to see more innovations and technology adaptation in the product segments besides the launch of new health-orientated savory snacks, including multigrain products, low-calorie products, and snacks with low levels of fat and cholesterol.

According to Rajnish Ohri, MD, Tilda Hain India Pvt Ltd (A Hain Celestial Company), makers of the snack brands ‘Terra’ and ‘Sensible Portions’, “With consumers becoming more health conscious, the impact on the sales of ‘Terra’ and ‘Sensible Portions’ has been very good as our products are all natural and rooted in vegetable-based snacking.







Snacks

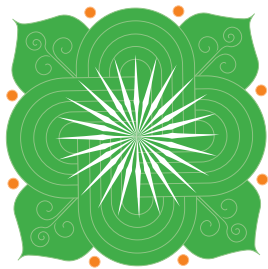
Category Watch

The millennials today are looking for better-for-you products with the taste intact. Terra chips and Sensible Portions veggie straws are the perfect mix of flavours and offer a healthier option of snacking than regular potato chips". Terra is a vegetable chips brand and Sensible Portions is extruded snack made out of vegetables with 100% natural flavours. Both the brands are non-GMO gluten-free products and made out of vegetables.

The changing consumer preference for healthy snacking has also pushed the sales of Cornitos. In the last couple of years, the brand, which has the complete range of healthy snacks, nachos, pop-n-crunch range that includes premium cashew, almonds, coated green peas and tacos, has seen positive growth. The range offers high protein, high fiber, low fat, high nutrition, gluten-free, non-GMO, no MSG and all natural flavour products to its health conscious consumers.

The consumer focus on healthy products has also set the wheels of innovations running as can be evidenced by the slew of healthy products in the category. Again, what is driving innovation in the segment is the need to balance taste and health without compromising on one or the other. This opens up opportunities to innovate within the better-for-you snacking category by focusing on healthier ingredients and new flavours. According to Vikram Agarwal, Director, Greendot Health Foods Ltd, which operates the Cornitos snack brand, "Healthy food has definitely become one of the fastest growing food categories in India. The consumers seek fresh, no preservatives added, natural and minimally processed foods that help prevent diseases and promote good health. We are aware that the consumer wants to select their food on basis of a) Better for you (low cholesterol, zero trans-fats); b) Functional (fortified with essential minerals and vitamins); and c) Natural (food with natural origins). Taking care of these factors, Cornitos products are non-GMO, zero trans-fat, zero cholesterol and high in protein with nature identical seasoning. Further, this year our product development team is working on new healthy products, which shall be launched in mid 2017." Keeping the health factor in mind,

**What is driving innovation in the segment is the need to balance taste and health without compromising on one or the other. This opens up opportunities to innovate within the better-for-you snacking category by focusing on healthier ingredients and new flavours.**



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**Healthy snacking as a new mantra is fast catching up and replacing junk snacking. Yoga gurus, doctors, personal trainers and dieticians are all actively helping in this welcome transition**

— Gunjan V Jain  
MD, VKC Nuts Pvt. Ltd.

Anmol has launched new products in the biscuit segment like Vitabix Marie, Tejus Digestive, mini digestive, thin arrowroot and zero sugar. “By cutting down extra sugar, zero trans-fat, and cholesterol, we are making our products lighter and easy to digest, hoping to attract consumers from all age groups,” says Gobind Ram Chodhary of Anmol Bakers.

Another brand, Cremica, has launched India’s first vegetarian mayonnaise, pizza pasta spread and Indian chutney range to meet the evolving customer needs. “Our recent launch of Indian flavoured sandwich Mayo’s is proving to be a huge hit in the market,” says Akshay Bector, Chairman, Cremica Food Industries Ltd., which manufactures a wide range of sauces and snack foods and is widely recognized as an inventor of vegetarian mayonnaise and numerous other innovative, healthy and tasty products that appeal to the younger generation. It is the only brand in India that does cottage chips under the name Opera and has also launched the Cremica French fries in two flavours, thus introducing a new way of eating chips.

Other noticeable trends in consumption relates to growing interest in nuts, the growth of corn-based snacks and increase in the use of traditional grains as an ingredient. According to Ranjana Sundaresan of Mintel, “In 2016, in terms of new products, nuts led the overall snack category with 21% of launches in India.” This could be partly ascribed to the growing concern among the younger generation for weight management and fitness. “Members of our young generation are very careful about not growing overweight and obese. Even those who indulge junk food and sugary beverages try to offset the impact by taking lots of nuts at other times. We offer dry roasted nuts as anytime snack with the right nutrition. In our grab- n-go packs, we are offering dry roasted nuts like almonds, cashews and pistachios, which are all healthy products.

Our products are hygienically roasted without any added oil and packed in smart pouches,” says Ritesh Bajaj, Director at K.B.B. Nuts Pvt. Ltd., which sells roasted nuts and dehydrated fruits under the Gourmia brand and also caters to renowned brands



**While nearly three-quarters of consumers wish there were healthier snack options, more than three in five agree that taste is more important than how healthy the snack is.**

— Avinash Tripathi  
Category Head, Godrej Nature's Basket



such as Haldiram’s, Pepsico, Britannia, Cadbury’s, MTR and many renowned retail marts.

Talking of nuts, Gunjan V Jain, Managing Director, VKC Nuts Pvt. Ltd., says: “Healthy snacking as a new mantra is fast catching up and replacing junk snacking. Yoga gurus, doctors, personal trainers and dieticians are all actively helping in this welcome transition. Our range of nuts, dried fruits, berries & seeds in myriad flavours

Retail market size   Snack Food – India			
VOLUME			
	Absolute size	Volume Consumption per capita (population)	Growth
Units	(ooo) tonnes	kg	%
2007	239.6	0.2031	
2008	267.5	0.2235	11.6
2009	303.9	0.2503	13.6
2010	347.1	0.282	14.2
2011	393.5	0.3154	13.4
2012	428.2	0.3389	8.8
2013	459.3	0.359	7.3
2014	529.7	0.4089	15.3
2015	626	0.4775	18.2
2016	753.4	0.5677	20.4
2017	870.1	0.6479	15.5
2018	982.4	0.7234	12.9
2019	1104.4	0.80378	12.4
2020	1242.6	0.8946	12.5

**Notes:** The overall market slowed down due to the economic situation in 2012 & 2013 but has recovered in 2014. The snack food market is discretionary expenditure and has seen the impact like any other FMCG product. There has been a shrinkage in the consumption basket. Other snacks is the largest segment in the market and is also the one that has the most new launches. Others comprises a very large variety of regional snacks including Mix/Mixtures, Chivra, Sev Bhujia, Banana Chips, Lachcha, Gathia, Murukkus, Papri & Ribbon Snacks as well as branded snacks such as Pepsico’s Kurkure & ITC’s Bingo. Many large companies including Parle & Perfetti van Melle are entering this category through Other snacks with their products Full Toss and Stop Not. Pepsico’s Kurkure is the leading brand in the branded snack foods market and is a variation of Cheetos without a cheese flavour but with spicy Indian flavours.

**Sources:** Economist Intelligence Unit, Company Information, Trade Interviews, Mintel.





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“**Healthy food has become one of the fastest growing food categories in India. Consumers seek fresh, no preservatives added, natural and minimally processed foods.**

— **Vikram Agarwal**  
Director, Greendot Health Foods Ltd.



fit the healthy snacking bill perfectly. Be it to satiate hunger pang in the office, or for an ‘on the go’ bite or for ‘sapped energy recouping’ after a hard gym workout, our range of snacks are hygienic, healthy and full of nutritional needs.” He adds that snacks with primary ingredients as nuts, dried fruits, seeds, berries etc., – tastefully flavoured and spiced – will be in great demand especially with the globalization of taste buds and rising income levels of the consumption oriented middle class, which will be driving force in pushing up the demand.

Vikas D Nahar, MD, Satvikk International that sells the Happilo branded snacks, observes: “Nuts are the kind of no-nonsense snacks our senses are starving for. Our snack products are based on nuts and dried fruits. Hence they are one of the healthiest things to be consumed in today’s world instead of junk food like potato chips, French fries or burgers. The most important feature about our nuts & seeds snack packs is that we have not added any oils. Hence all the goodness of the product is maintained and it is a guilt free healthy snacking option as preferred by the younger generation.” The company sources the products from the best farms around the world and has adopted premium packing in high quality pouches to retain the freshness of products. The shelf life of snacks is a major concern in the industry, especially in a segment like nuts that is still majorly in the unorganized category. “We have tried to organize the unorganized nuts market and also address the shelf life issue by ensuring that our products have a minimum life of nine months,” says Nahar whose snack range price points starts from as low as Rs. 25 and goes upto Rs. 70. Happilo’s 200/250 gram gourmet packs are priced Rs. 165/- onwards and the products are widely sold in all major MT outlets. To ensure quality and better shelf life, VKC Nuts, one of the India’s



“**Retailers should encourage non-GMO, gluten-free and vegetable snacks. Better category management will help retailers and consumers looking for better-for-you products.**

— **Rajnish Ohri**  
MD, Tilda Hain India Pvt. Ltd.



Snack Food – India   Retail market size			
VALUE IN LOCAL CURRENCY			
	Value	Unit prices	Value growth
Units	bn INR	INR per kg	%
2007	43.4544	181.4	
2008	50.056	187.1	15.2
2009	59.2664	195	18.4
2010	76.987	221.8	29.9
2011	93.641	238	21.6
2012	112.3692	262.4	20
2013	137.0904	298.5	22
2014	162.0131	305.9	18.2
2015	197.751	315.9	22.1
2016	236.6128	314.1	19.7
2017	284.5497	327	20.3
2018	333.9611	339.9	17.4
2019	390.8865	353.94	17
2020	459.3731	369.69	17.5

**Notes:** Snack food is a very large market in India though it is dominated by small scale manufacturers. The branded snack market has been growing rapidly in the last few years and is expected to grow further as the market is becoming organised and the consumers are shifting preference from crisps to traditional snacks. The nut snack market is not doing well because of the high price and low shelf life. Namkeens/Farsans is a very large market in India though it is dominated by small scale manufacturers who produce a tremendous variety of regional snacks that are sold fresh and are typically unbranded. There is also an established retail presence for this category - much like “sweet shops” that sell fresh savoury snacks loose by weight. The market size in this report includes only the branded snack market which has been growing rapidly in the last few years. Consuming snack food is a daily habit with most Indian consumers and this is the most popular accompaniment to tea along with biscuits.

**Sources:** Company Information, Trade Interviews, Mintel.

Market Sizes   Retail Value RSP   INR mn			
Geographies	Categories	2014	2015
India	Savoury Snacks	1,68,816.80	2,06,033.10
India	Nuts, Seeds and Trail Mixes	14,157.60	16,314.20
India	Salty Snacks	97,079.00	1,18,974.00
India	Savoury Biscuits	26,777.50	30,484.20
India	Popcorn	1,711.90	2,053.20
India	Other Savoury Snacks	29,090.90	38,207.50

Source: Euromonitor

largest processor of nuts and dried fruits, operates four processing facilities that are state-of-the-art, ultra hygienic and use the most modern machineries including laser sorters, robotic machines as well as modified atmosphere vacuumed packing machines, all of which lead to a very uniform, pure and healthy end product for the consumers.

Globally as well, there is growing interest in nut mixes as they are seen as a snack that is both healthy and indulgent. Even in India, the consumption pattern of households is moving away from oils, fried snacks/processed foods to less fatty and healthier foods. "Allergen-free, cholesterol-free and gluten-free claims are the most popular in the nuts segment. Other trends driving healthy snack growth include innovative flavours, a shift toward bite-size and single-serve snacks that tie in perfectly with the ongoing trend toward healthier eating," points out Nahar. "Working people in mature markets prefer to carry handy packs of roasted nuts with them. Parents give these to their school going children. We are



offering 14 grab-n-go packs (40 gm each) for two weeks of consumption in a handy dispenser. These packs help to curb hunger anywhere and anytime and can also be carried on a vacation as they serve as a good in-between meal filler," observes Bajaj.

Apart from the growing prevalence of nuts being used as a handy and healthy snack, there is also a growth in the use of traditional grains as an ingredient and a shift in regional snacks toward occupying an increasingly mainstream perch and being sold in a packaged format. For example, snack launches that use ragi as an ingredient grew by 50% between 2015 and 2016, while makhana or fox nut snacks doubled during this period. Corn-based snacks are also growing in India, with product launches increasing by nearly 40% between 2012 and 2016. Branded popcorn, specifically, doubled in terms of the number of launches during this period. Corn chips are also seeing significant growth, with the entry of a number of snack majors into this category in the last couple of years.

The success of Cornitos Nacho Crisps points to the growth of corn-based snacks and its acceptance among Indian consumers. Cornitos Nacho Crisps which has 70% market share in Nacho Crisps

Category in India is a 100% corn snack, is cooked in corn oil with no cholesterol and with natural ingredients making it healthy ideal choice for the young generation. "Corn is a good source of fiber and has digestive benefits which make nachos the perfect healthy snack choice. The Nitrogen flushed technique keeps the product fresh for months. While regular potato chip has a four-month shelf life while Cornitos has a shelf life of six months," says Vikram Agarwal of Cornitos snack brand.

### Retail Play

As per Nielsen Health & Wellness report, health and wellness foods is an INR 10,352 crore market with a growth rate of about 10%. With consumers looking for all natural, gluten-free, non-GMO products, the category is growing. Retailers need to allocate more shelf space in their stores and give more weight to the category. Ohri of Terra Chips believes that the retailers need to support the brands by pushing for the healthier variants of the existing products. "Retailers who do allocate more shelf space do not mark the categories with their specialities (like gluten free or non-GMO). Retailers should encourage non-GMO, gluten-free and vegetable snacks in the snacks category. Better category management will not only help the retailers but also the consumers who are looking for better-for-you products," he says.

Retailers who want to grow sustainable sales and increase customer traffic need to capitalize on the important trends. The ones who make snacking easy



“Members of our young generation are very careful about not growing overweight and obese. Even those who indulge junk food and sugary beverages try to offset the impact by taking lots of nuts at other times.

— Ritesh Bajaj  
Director,  
K.B.B. Nuts Pvt. Ltd.

### Snack Food – India | Retail market size

Snack Food – India   Retail market size					
VALUE IN GBP					
	Value	Spend per capita (population)	Spend as a proportion of GDP	Unit prices	Value growth
Units	m GBP	GBP	%	GBP per kg	%
2007	525.4462	0.44541	0.0866429	2.193	
2008	621.242	0.518969	0.0958307	2.322	18.2
2009	783.6879	0.645446	0.0917237	2.579	26.1
2010	1094.283	0.888953	0.100785	3.153	39.6
2011	1243.999	0.997234	0.110238	3.161	13.7
2012	1324.7118	1.04837	0.115041	3.094	6.5
2013	1497.233	1.17017	0.12562	3.26	13
2014	1619.3346	1.25017	0.130009	3.057	8.2
2015	2003.7124	1.52833	0.148776	3.201	23.7
2016	2602.4595	1.96116	0.16044	3.454	29.9
2017	3461.6752	2.57757	0.177919	3.978	33
2018	3987.8721	2.93658	0.185408	4.059	15.2
2019	4511.4683	3.28346	0.192226	4.085	13.1
2020	5377.7105	3.87164	0.203555	4.3278	19.2

Sources: Economist Intelligence Unit, Company Information, Trade Interviews, Mintel.



“  
We are the only brand in India that does cottage chips under the name Opera and has also launched the Cremica French fries in two flavours, thus introducing a new way of eating chips.”

— Akshay Bector  
Chairman, Cremica Food Industries Ltd.

through effective merchandising, pricing, and promotion strategies that focus on shoppers wants and needs will help drive sales throughout the store. There is no doubt that the growth of modern trade too has helped stimulate a revolution in the packaged snack food industry in India. According to Avinash Tripathi of Godrej Nature's Basket, sales in the snacking category has shown a six-fold growth from INR 8,000 crore in 2004 to INR 47,000 crore in 2013. According to Euromonitor, the snacks category is expected to grow by 14% CAGR during 2015-20 in retail value terms at constant prices.

But while healthy and better-for-you snacks are growing fast and there is a huge headroom to expand the category, many retailers confirm that

INDIA - SNACK FOOD: RETAIL MARKET SEGMENTATION BY VALUE (BN INR)				
Segment	Total	Other Snacks	Crisps	Snack Nuts
2010	76.987	47.321	26.099	3.567
2011	93.641	58.653	30.134	4.854
2012	112.3692	67.451	38.5715	6.3467
2013	137.0904	80.9411	47.8287	8.3206
2014	162.0131	97.1294	55.003	9.8807
2015	197.751	119.9548	66.8286	10.9676

**Notes:** The snack food market is discretionary expenditure and has seen the impact like any other FMCG product- there has been a shrinkage in the consumption basket.

Other Snacks is the largest segment in the market and is also the one that has the most new launches. Other Snacks comprises a very large variety of regional snacks including Mix/ Mixtures, Chivra, Sev Bhujia, Banana Chips, Lachcha, Gathia, Murukkus, Papri & Ribbon Snacks as well as branded snacks such as Pepsico's Kurkure & ITC's Bingo. Many large companies including Parle & Perfetti van Melle are entering this category through Other Snacks with their products Full Toss and Stop Not, for example. Pepsico's Kurkure is the leading brand in the branded snack foods market and is a variation of Cheetos without a cheese flavour but with spicy Indian flavours.

The average selling price of snack nuts were lowered in 2015 to increase volume sales, as its price is relatively expensive compared to other segments.

**Sources:** Company Information, Trade Interviews, Mintel.



**Dilip Radhakrishna**

Research Analyst  
– Packaged Food  
at Euromonitor  
International

**Which are major product segments in snacks category?**

The category is divided into:

**Savoury Snacks:** This is the aggregation of fruit snacks, chips/crisps, extruded snacks, tortilla/corn chips, popcorn, pretzels, nuts and other sweet and savoury snacks.

**Other Savoury Snacks**

Any snack products not included in the previous definitions fall under this heading. Examples of such products are seaweed snacks, fish snacks, pork scratchings, non-dairy based cup jellies (both chilled and ambient).

**Which are the top-selling snack products in India?**

Salty snacks is the largest selling snack product in terms of retail value sales with a contribution of 55%-58% of total value sales within snacks in India. It is also the largest in terms of volume share.

**What would be the size of the organised snacks market in India?**

For the “Savoury Snacks” market, the retail value sales stood at INR 206 billion at current prices in 2015.

**What is growth of the snack market? How do you see the demand growing?**

The savoury snacks category is expected to grow by 14% CAGR during 2015-20 in retail value at constant prices. Growth will be driven by consumers' rising disposable income and changing lifestyles, and by manufacturers' product innovation and expansion of distribution into lower-tier cities and rural areas.

**Which are the interesting and emerging consumer trends in the category?**

We expect to see the launch of new health-orientated savoury snacks, including multigrain products, low-calorie products, and snacks with low levels of fat and cholesterol. The range of snacks tailored to local tastes is set to broaden, as regional players expand and international players develop their brands more.

Niche Western snack like tortillas are gaining prominence in the Indian sub-continent so are traditional Indian snacks like namkeens, bhujia, daal, bhakarwadi, khakhra, chakli, kodublae, which were mostly region-specific.

**What can brands and retailers do to grow and expand this category?**

Companies have an immense opportunities to venture into uncaptured regions across India. Especially in the case of regional players, they are strong contenders in their home turf to sell their products in neighbouring states and tier I and II cities. However, other regions are left unexplored due to weak audience or logistics issues. Companies can outsource their product manufacturing to a local franchise and support them in the marketing activities, which can help the brands to be sold to neighbouring markets.



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they are also experiencing flat or declining sales in many traditional cookie, cracker and salty snack options. To take advantage of this swing in demand away from traditional “junk food,” retailers and manufacturers are now earnestly leveraging the healthy halo of complementary products. Retailers are creating a better-for-you snacking center in their stores, which allows them to bring new items in quickly. The better-for-you snacking displays are delivering more incremental sales growth than traditional snacking items and so retailers are encouraged to leverage product identifiers for organic and gluten-free items as a way for customers to easily identify those items.



**Allergen-free, cholesterol-free and gluten-free claims are the most popular in the nuts segment. Other trends driving healthy snack growth include innovative flavours, a shift toward bite-size and single-serve snacks that tie in perfectly with the trend toward healthier eating.**

— Vikas D Nahar  
MD, Satvikk International

To maintain the momentum, retailers are actively collaborating with snack food suppliers by sharing current sales trends and data to ensure that suppliers have the most current data for making base retail and promotional retail decisions. This collaborative approach also allows suppliers to react quickly to leverage best-in-category retails and tactics to drive additional sales. “We place the packs near the cash tills in most retail counters and we are also offering our grab-n-go nut packs in some of the premium coffee outlets and hotels for casual and mini-bar snacking in rooms,” points out Bajaj of Gourmia.

Snack brands that Progressive Grocer spoke to listed out a few suggestions for better category management. These include:

- Provide retail link to the brands for better understanding of buying trends
- Separation of healthy snacks from the regular snacks category
- Healthy snacks category can be further subdivided into products according to zero cholesterol, gluten-free, non-GMO, diabetic-friendly, etc.
- Planogram to display new and emerging categories in a more prominent way without frequent changes
- Adapting to region-wise product category management on the part of retailers to grow at a faster pace
- Good visibility and promotion, and ad campaign promotion by retailers at positive points of sale
- Attractive combos with discounts and schemes to persuade buyers



INDIA - SNACK FOOD: RETAIL MARKET SEGMENTATION BY VOLUME (000) TONNES				
Segment	Total	Other Snacks	Crisps	Snack Nuts
2012	428.2	286.8	128.6	12.8
2013	459.3	309.3	134.2	15.8
2014	529.7	362	149.4	18.3
2015	626	435.6	168.1	22.3

Sources: Company Information, Trade Interviews, Mintel.

Retailers and brands should join hands to promote snacks by helping consumer to shop better and buy products that suit their taste preferences. This can happen only with the combined efforts of the manufacturer, retailer and consumers and will help pave the way to innovation in the snacks category. Today, the faster pace of urbanization gives manufacturers immense opportunities to venture into new regions across India and promote their brands. Especially in the case of regional players, they are strong contenders in their home turf to sell their products in the neighboring states and tier I and II cities. However, other regions are left unexplored due various reasons: product awareness in the market could be weak, consumers’ exposure to the product could be low and/ or because of logistics issues. In such cases, manufacturers can outsource their product manufacturing to a local franchise and then support it in the marketing activities. Taking such an approach can help the brands sell their products to the neighboring markets.

Distribution remains a key component for any brand; therefore the challenge for local players is to strengthen their distribution networks and expand their retail reach. The eagerness of companies to penetrate newer markets and make their presence felt is seen in the new strategies adopted by them. From exploring the online channel to having dedicated teams working on the expansion of retail, brands are leaving no stone unturned.

As e-commerce is witnessing a tidal surge, brands like Cornitos are actively paying heed to this new trend. Its products are available on leading grocery e-tailers, and even on Amazon USA. Cornitos, whose share of sales from modern trade is 40%, has launched new combo packs to give an enhanced presence to its brand in the retail space. It has conducted extensive wet sampling in top modern retail outlets and organized healthy snacking awareness activity in schools to strengthen the reach of its products. Similarly, Terra Chips, which has a similar sales contribution from modern trade, is present in all gourmet retail stores and also sells on all online grocery platforms. Cremica, whose share of sales from modern trade is 60%, has a dedicated team working on retail expansion. Anmol Bakers and AFP, which have 7% and 5% sales contribution



respectively from modern trade, are working on strengthening their distribution network in tier 2 and tier 3 cities.

### Challenges

While the prospects remain bright for the snacks category, the challenge will come from new entrants. Going forward there will be increased focus on continuous product innovation to stay relevant and combat competition. The other major challenge will be to get it right on the packaging, taste, price, and local trade practices for specific regions. Indian consumers are increasingly inclined to quality, well-packaged snacks as these are commonly associated with greater credibility, longer shelf life, and better product. Snacks in small packages will become highly relevant in the Indian market. The demand for small snack packs has increased considerably over the past few years, especially in the rural regions of India. This is because price is a primary factor in snack purchase and small pack sizes can be marketed at lower unit prices, making the product more affordable. As consumer loyalty is low in snacks, small snack packs, besides being portable and convenient, are an effective way for manufacturers to



constantly engage their consumers through frequent introduction of novel flavours and offerings.

Although robust and thriving, the Indian food retail market is yet to unfold its true potential. However, the long-term beneficiaries will be those that manage to engage the consumers with innovative and unique products for Indian consumer with the products having the right mix of quality and affordability. Only those who strive to provide differentiated offerings of high quality and taste to the consumers will stand to gain and benefit. **PG**

**While the prospects remain bright for the snacks category, the challenge will come from new entrants. Going forward there will be increased focus on continuous product innovation to stay relevant and combat competition.**

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# How to make sure your business booms

Consistency in website streaming has been a major issue for e-commerce players and is extremely challenging as it can make-or-break their prospects.

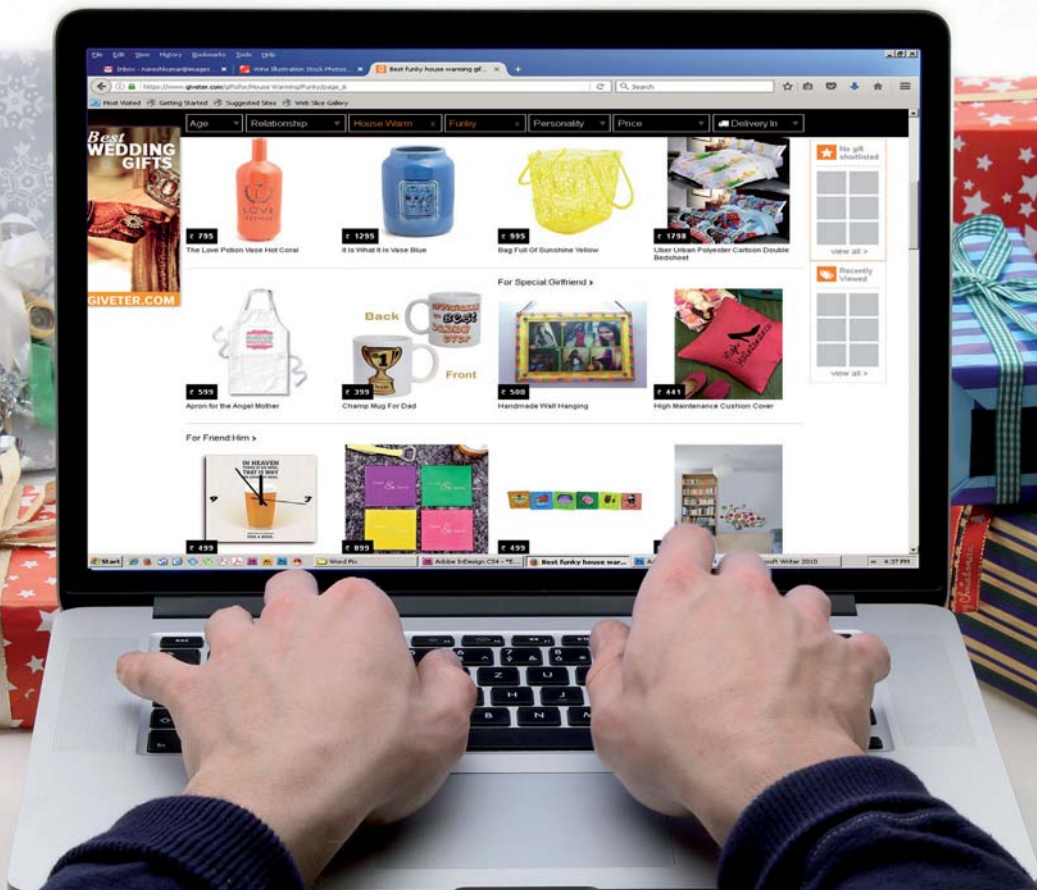
By Ashok Acharya

**A**s India gears up for another economic revival, consumers face the prospects of great deals and discounts during festive sales by the leading e-commerce players. Heavy traffic and increase in sales often muddle the functioning of these online portals. This year is going to be no different with experts predicting further rise in sales. The question is: How can you ensure your online business to sustain the festive sale traffic, so you don't miss out any opportunity?

In recent years traffic loads of up to twenty times greater than normal have been seen by Indian e-commerce sites. Unlike Black Friday and Cyber Monday in other countries, the sale season lasts several days, so sustained availability is the key.

## Consumers demand availability

Over the past two years, the e-commerce sector has seen significant growth in India, driven by rapid technology adoption led by increasingly popular consumer devices such as smartphones and tablets, coupled with improved broadband access and 4G network. Furthermore, eBay and Amazon have intensified competition for Indian companies, and providing seamless online transactions is a must to challenge these international e-commerce behemoths. In addition to the user experience, greater emphasis has been placed on downtime by e-commerce businesses. Failure to manage the extra load during the festive season has severe repercussions that last well beyond Diwali.



According to the 2016 Veeam Availability Report, application downtime cost enterprises \$16 million each year in loss of revenue and productivity. However money is not all that is at stake; the data loss and downtime can cause massive employee productivity issues, customer experience problems, damage to the company's reputation and concerns from the stock market affecting company's valuation.

Consumers expect high performance and speed from websites or apps. It is therefore important to meet this expectation. That sounds obvious, but every year there are brands that fail to do this; their websites crash or they have slow load times and miss out on sales.

**Technology, the enabler?**

According to Morgan Stanley, the e-commerce sales in India is expected to reach nearly \$120 billion by 2020. How do e-commerce players tap this growth opportunity? With India on the cusp of digital revolution, technology is expected to play the role of the catalyst facilitating this. However, the real challenge for IT professionals is how to manage modern digital business requirements with out-of-date legacy technology.

I have noticed that all e-commerce players have their own specific challenges that mean they are pretty much in need to access everything. However, with the current backup and replication standards, they settle for a low performing backup solutions. More often it cannot match up the newly built infrastructure of the modern data center.

In a recent survey, 82 percent of CIOs say that there is a gap between the level of availability they can provide now and what end-users demand in order to provide an always-on business. Thus, planning for restoring data, in the fastest and efficient way possible, is essential if businesses are to avoid unnecessary downtime and loss of revenue.

**Ensuring you're ready...**

To be fully geared for the massive spike in sales like those seen during the festive season, I recommend online retailers take the following factors into consideration. Taking these measures will guarantee availability, minimise downtime, and avoid missing out on the sizeable sales opportunity ahead. You might think you have what you need, but only when things go wrong do you really know.

**Capacity planning** – In order to determine what potential peak loads are for your site servers, remove the guess work by reviewing previous figures using monitoring data and plan for a significant uptick beyond that you've seen before.

**Real-time monitoring** – Preparing yourself in advance is obvious, but do you have a simple way of being alerted to issues in your backup and virtual

environments when it matters? Are you confident you can avoid downtime and meet your Service Level Agreements (SLA)? Not only does this speed up troubleshooting of issues, and diagnosis of root causes, it can enable your team to manage potential issues before it turns into an actual problem.



**Test and test again** – Sure you've got a backup schedule, but that's just not enough. You need to ask some serious questions. For example, how long does it take to recover the backup? Do you have the ability to restore a certain file or is it the whole system? How often do you test those backups to ensure they work and can be used as a point of rebuild? How many of your backups would fail? Less than 6 percent of backups are tested each quarter, and more than 16 percent of backups fail to recover.

Making data available 24 X 7 for 365 days a year is imperative, if you wish to drive a competitive edge and survive the digital disruption that is changing the business landscape. Words spread faster now, than ever before all thanks to the social media, where your customers and competitors are always connected.

If last year was a success, don't take it for granted that 2017 will be fine too. If you can't re-establish your website or app within 15 minutes, you need to seriously re-evaluate your systems. Start by asking yourself, 'what will be the next steps I take towards availability for our website or app?'

The availability gap is the hidden true cost of your data centre, and ultimately your online business. Don't let it stop your business from seizing the opportunity when the next festive season rolls around. **PG**

**Making data available 24 X 7 for 365 days a year is imperative, if you wish to drive a competitive edge and survive the digital disruption that is changing the business landscape.**



The writer is the Regional Director, India and SAARC, Veeam, an IT company



# A Brand Idea

Eye-catching displays, clever campaigns are making a name in fresh fruits and veggies.

By Jennifer Strailey

“  
**Branded produce is quite important today, because trust, safety, quality and reliability are how consumers make their choices, and that's what brands convey.**

— **Mary Coppola**  
 United Fresh Produce Association

“**B**randed produce has changed the consumer dialogue about fresh fruits and vegetables,” asserts Mary Coppola, senior director, marketing communications for the Washington, D.C.-based United Fresh Produce Association, who sees brands as a vehicle for helping the consumer differentiate between choices in the produce department.

“As real estate in the department becomes more and more valuable due to the addition of new and different SKUs, branding becomes even more critical,” she continues, noting that it builds loyalty and communicates trust, familiarity and consistency.

“Branded produce is quite important today, because trust, safety, quality and reliability are how consumers make their choices, and that's what brands convey,” affirms Coppola.

According to “Fresh Facts on Retail,” a report from United Fresh and Nielsen Perishables Group, products such as salad kits and value-added vegetables, both of which are widely branded, continue to drive growth in the produce department. Meanwhile, value-added fruits contribute 5 percent of dollars to total produce.

Sustaining and growing sales of branded produce offer both fresh opportunities and new challenges for supermarkets.

“The real challenge is in maintaining that success and capitalizing on it as you introduce new products to the retail space,” says Coppola, who adds that focusing on the messages that resonate most with consumers — fresh, healthy and convenient — is key. “It's the trifecta for success.”

## Runaway Success

What could be more fresh, healthy and convenient than an apple? Rainier Fruit Co. encapsulates the fruit's virtues in its new Wholesome to the Core messaging. The Selah, Wash.-based company's latest campaign targets health-conscious consumers in general, and runners in particular.

“According to Running USA, running as a sport has grown by over 300 percent during the last 20 years, and nearly 19 million athletes completed a running event in 2015,” notes Andy Tudor, Rainier's director of business development. The company plans to support this burgeoning community with online promotions and in-market events that celebrate everyday runners.

As part of Rainier's new focus, it has forged a three-year sponsorship agreement with the Boston Athletic Association to serve as the official apple of the Boston Marathon, an event that attracts some 30,000 participants and 500,000 spectators.

Rainier created a special Boston Marathon box that was featured in supermarkets and club stores, including Whole Foods Market and Costco, throughout the Northeast. Many of the participating retailers, like a Whole Foods store in Portland, Maine, built captivating displays of Rainier's organic apples using the display-ready marathon boxes.

“The iconic blue-and-yellow branding of the Boston Marathon got both retailers and consumers excited, and drew more shoppers into the category — especially at a time of year that apple sales are lagging,” observes Tudor.

The Boston Marathon boxes also built brand recognition for Rainier's organic Lady Alice,

Honeycrisp and Junami apples. “We have made a large shift toward organic production in apples, pears and blueberries over the last 15 years, making us one of the largest organic fruit producers in the U.S.,” adds Tudor.

While progress has been made in building brand loyalty in the produce department, the industry’s work is far from done. According to Tudor, “Produce has several legacy brands that have been around for a long time, and a few new brands that have recently developed thanks to the power of marketing, but as a rule, consumers aren’t able to name a lot of branded produce.”

Ongoing success depends on suppliers and retailers alike consistently supporting quality, great-tasting products with a strong message position.

**Good Times**

Holidays and special events provide the perfect opportunity to showcase popular brands in the produce department. Produce managers across the country have particularly shown their display prowess in the avocado category leading up to the Super Bowl.

Prior to Super Bowl 50, the Target website posted an image from its Edina, Minn., store that depicted a bountiful bin of avocados branded with Avocados From Mexico’s Taste the Victory tagline. Above the



**COOL RUNNINGS**  
A Whole Foods Market in Portland, Maine, features Rainier apples for the Boston Marathon.

image, the retailer used the following caption: “This Week’s Spike in Avocado Sales Can Only Mean One Thing: It’s Game Time.”

Minneapolis-based Target also touted a short nutritional message and a few of its favorite avocado recipes for game day on its site.

Meanwhile, a Mollie Stone’s Market in Greenbrae, Calif., used the Irvine-based California

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**Fostering collaborations between supermarket produce managers, school nutritionists and school foodservice directors helps to raise awareness of the health benefits of eating a diet rich in fresh fruits and vegetables among children and their families.**

Avocado Commission's Taste the California Difference bins to build a dramatic Super Bowl 50 display complete with a Golden Gate Bridge replica, plenty of avocados and all of the ingredients needed to make guacamole for the Big Game.

**Making a Name in Back-to-school**

While consumers increasingly seek healthful, flavorful and convenient products from the produce department, retailers and suppliers report an uptick in sales of these items when kids head back to school.

"This is the perfect time of year to feature complete on-the-go snacks and meals that appeal to busy parents and their families who are looking for healthy, affordable options for school, work lunches and snacks," asserts Alan Hilowitz, company spokesman for Ready Pac Foods.

Irwindale, Calif.-based Ready Pac recently launched a campaign aimed at offering busy families convenient produce-based meal solutions. The We've Got Your Back campaign, which runs through Sept. 18, features a sweepstakes, sampling parties, digital coupon offers and more.

"The main message is that Ready Pac Foods delivers a remedy to the chaos — freeing up busy consumers' meal and snack prep time so they can focus on family, friends, work, school and themselves," explains Hilowitz.

"Consumers are looking for fresh foods wherever they shop for groceries, as evidenced by the increase in sales and products in the perimeter aisles at most stores," he continues. "Our goal is to give people the freedom to eat healthier, and we want consumers to associate our brand with that desire."

Ready Pac offers a host of convenient options, including its most recent introduction: Ready Pac Organic Chopped Salad kits in four flavors: Caesar, Zesty Greek, Kickin' Southwest and Sweet Kale.

When it comes to increasing fresh produce sales for the back-to-school occasion and beyond, United Fresh's Coppola recommends that retailers take a two-pronged approach, working both with produce companies to partner on back-to-school campaigns and with communities to educate consumers.

Fostering collaborations between supermarket produce managers, school nutritionists and school foodservice directors helps to raise awareness of the health benefits of eating a diet rich in fresh fruits and vegetables among children and their families. However, "education shouldn't end when the school bell rings," Coppola adds.

Dan Crowley, VP, sales and marketing for Well-Pict, in Watsonville, Calif., agrees that fresh produce education and information are important year-round.

"In order to maximize sales of branded produce, particularly berries, during back-to-school time, it is important for retailers to make clear the year-round availability," he urges. "Parents are enthusiastic about their children starting the upcoming school year right and continuing nutritious eating habits for the duration of the school year. This makes well-stocked berry displays especially important."

Cross-merchandising, suggesting recipes and promoting the health benefits of berries can also help drive additional sales across the berry category.

"Branded produce, especially berries, is significantly important to the fresh produce industry," says Crowley. "Although strawberries tend to see the strongest sales, co-locating strawberries with other types of berries in a 'berry patch'-style concept drives impulse purchases and creates a berry destination within the store."

On the recipe front, Well-Pict held A Very Berry Breakfast recipe contest this past summer. Consumers were invited to submit original breakfast recipes that featured Well-Pict strawberries and/or raspberries, for a chance to compete in the breakfast category of the 2016 World Food Championships. The contest winner will represent Well-Pict at the Championships in Orange Beach, Ala., this November. **PG**



**GAME ON**

A Mollie Stone's Market offers an eye-catching California Avocado display in honor of the Big Game.



**BERRY SPECIAL**

Merchandising Well-Pict strawberries and raspberries together creates a "berry patch" atmosphere.



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# Lighting up the path to purchase

With 76 per cent of purchase decisions by shoppers made in the store, tools of category management help to create the right environment to nudge shoppers along the path to purchase.



**W**hen a shopper goes out to shop she has different interactions with various categories. Suppose if she goes out to shop for a monthly item like rice, the way she will interact with this category will be very different from the hand wash category or a juice category.

Shopper marketing is any marketing stimulus designed to persuade the shopper to buy. Marketing stimulus moves a shopper along the path to purchase. The stimulus can be an advertisement in radio, TV, newspaper or the digital media. The idea is to generate awareness for the product and, from thereon, the buying decision can be made followed by a purchase.

With the food and grocery industry witnessing a dramatic development in recent years, it is only natural that the category management process must undergo an update to make it relevant for today's fast-paced times. New-age category management not only inspires shoppers to shop with greater felicity but it also creates the urge for impulse buying. Category management is also the key to reduce the cost for retailers, increase their sales and improve profit margins, all the while keeping consumers happy.

Ankush Shiv Bhandari, MD, Asbicon Group, London, asks: "When we look at this term, what are the keywords that shout out at you?"

In the world of consumer goods, shopper and category management are the two words that are very important. The chief difference between these two terms is: a shopper is a person who buys the product and a consumer is one who consumes it. A shopper actually buys a brand but may not necessarily consume it. He may buy it for someone else. If we take the example of a mother buying nappies for her child, she is just the shopper while her baby is the consumer.

So shopper marketing is any marketing stimulus designed to persuade the shopper to buy. Marketing stimulus moves a shopper along the path to purchase. The stimulus can be an advertisement in radio, TV, newspaper or the digital media. The idea is to generate awareness for the product and, from thereon, the buying decision can be made followed by a purchase. There are many marketing tools that can be used: promotions, sampling, sponsorship or partnership or even the packaging design. But the main focus continues to be the store where the purchase is made. Why? "It is because 76% of purchase decisions are made in the store. So the store environment should be treated as another media channel, and it is indeed the biggest channel," says Bhandari.

Category Management is a concept that has been in the fray for a few decades now. The basic assumption behind this concept is that at the point of purchase, whether it is a retail store or an online shopping environment, a category is treated as an individual business unit. If you are going to a 'Big Bazaar' or 'More' to shop, you will see that within that shopping environment there is a category that is defined – like biscuits or snacks. So the management of a category as an individual business unit on both the manufacturer and retailer side is what is called category management.

There is a well-defined process, which has been used for decades now, for building the structure of category management and its application. The most simple and common structure that is used is to first define the category itself and then identify what constitutes that defined category. For example, hair care is a broad category, within which there are the constituents: shampoo, conditioner, hair gel, etc, all of which can become



**The whole concept of category management, historically, has been more internally focused and not necessarily shopper focused. And that is where a change is now being brought about with the concept of shopper driven category management.**

— Ankush Shiv Bhandari  
MD, Asbicon Group



a separate category. Category management is an eight-step cycle, which makes for the process of categorization. These are:

- Define category
- Assess role of category
- Assess performance
- Set objectives and targets
- Devise strategies
- Set category tactics
- Implementation;
- Review

What is interesting about the process of categorization is that there isn't a shopper or consumer in the whole process. "So the whole concept of category management, historically, has been more internally focused and not necessarily shopper focused. And that is where a change is now being brought about with the concept of shopper driven category management. Basically, the age-old concept of category management is now being combined with the needs of shoppers to arrive at a concept that is shopper driven category management," says Bhandari.

Looking at the Indian shopper, we can see that they have various shopping missions. When an Indian shopper goes out to shop there is a shopping mission behind it. There is a reason for which a shopper goes out to shop. It could be that they are going out for their daily top-up, like the 'Doodh Anda or Bread 'or the daily staples or it could be that they are out there for their weekly shopping, or monthly or festival shopping. There could be many more shopping missions. When a shopper goes out to shop she has different interactions with various categories. Suppose if she goes out to shop for a monthly item like rice, the way she will interact with this category will be very different from the hand wash category or a juice category. So the shopping mission defines the way she interacts with other categories.

From a manufacturer's or retailer's point of view, it would be helpful to understand what will be the shopper's path of purchase. In the world of trade marketing or shopper marketing, path to purchase is a concept where the journey of a shopper is mapped in a store environment. It is the journey that a shopper takes before buying a product. Firstly, they have to be aware of the product, then understand and believe. Then they will want the product and try to find it and then buy it and use it.

For example, if someone is out there to buy rice, she is aware of the product and must have been buying it for long years. But probably she is used to buying it loose. So with the concept of packaged rice now becoming prevalent, an effort needs to be made to make her aware of the packaged product and help her

understand this new product. The point of purchase is always associated with 'Find, Believe and Buy', since this is where the actual purchasing action happens.

Another good example of the application of category management concept pertains to juices. The aim has been to ensure that tetra packets of juices enjoy a higher penetration level. Big Bazaar was the pilot retailer in advancing this objective. If we look globally, the penetration of juices as a category is 70%. What it means is that out of the hundred people going to a store to shop, seventy of them will buy juices. But in India, the penetration of juices as a category had remained an abysmal 2% for too long till about a decade ago, which was a huge lag by the global standards.



The challenge therefore was to understand the ways of increasing the penetration of juices in the Indian market. The type of shoppers who were engaging in the category had to be understood. The key shopping mission of the shoppers had to be defined keeping in mind the shopper's perspective. It was identified that people wanted to buy juices for their breakfast or for their kids' school lunches. With this knowledge, some of the shopping missions were prioritized and a plan was put in place by the manufacturers as well as retailers to activate the whole path of breakfast purchasing. In terms of merchandizing, communication and other elements, the whole package was put into play to focus on the juices business.

As a result of concerted efforts in category management, the juice category is now growing in healthy double digits. At present, the Indian packaged juices market is valued at INR 1100 crore (~USD 200 million) and is projected to grow at a CAGR of ~15% until 2018. **PG**





# Measures of Success

Retailers await the impact of advanced devices to shape health and wellness.

By **Christina Veiders**

“  
Once you have data integrity, it's no longer a device for sports or fitness purposes only. Doctors can use it to draw conclusions based on the data.”

— **Roeeen Roashan**  
IHS Technology

**A** new generation of digital health-monitoring devices has emerged, foreshadowing the future of health care and wellness.

Retailers with strong positions in health and wellness will have opportunities to cash in on the technical advances and device proliferation as they develop from consumer to medical markets or vice versa, according to industry analysts.

Biometric tracking is approaching a crossroads between personal health (sports and fitness trackers) on one end and clinical health (blood pressure and blood glucose meters) on the other.

Just how it all converges at retail, both in HBC aisles and behind the counter, isn't yet clear, but the potential is big.

IHS Technology, an Englewood, Colo.-based global information company, valued the U.S. market for consumer medical devices at \$3.3 billion in 2015, growing at 5.2 percent CAGR through 2020.

The category comprises activity trackers; pedometers; blood glucose meters; blood pressure monitors; heart rate monitors; pulse oximeters; TENS devices (electro nerve stimulation); nebulizers, patches; body composition analyzers; thermometers; hearing aids; personal scales; pregnancy tests; and fertility test kits.

More digital health device manufacturers will make the upgrade to medical-grade products. That means approval from the U.S. Food and Drug Administration, according to Roeeen Roashan, IHS senior digital health analyst.

San Francisco-based Fitbit, which sold 21.4 million activity trackers last year and has begun tackling quality and accuracy issues, is moving in this direction, according to news reports.

That's important, says Roashan, because “once you have data integrity, it's no longer a device for sports or fitness purposes only. Doctors can use it to draw conclusions based on the data.”

Medical-grade devices are likely to be covered by insurance companies, while consumer-grade devices are likely not to be covered. For now, smart retailers are trying to capitalize on the burgeoning market of connected digital health devices.

## Connected Health

As part of its positioning on wellness and innovation, Minneapolis-based Target, which has converted its pharmacies to the CVS Health banner, has rolled out Connected Health sections in the pharmacy areas of 550 stores. Target is also focused on elevating its food assortment to fresh and organic products as part of new initiatives unveiled last year.

The 6-foot Connected Health sets feature about 14 medical-grade devices, including Quell, a wearable nerve stimulation device from Waltham, Mass.-based Neurometrix that also measures sleep. Price points range from \$39.99 for a wireless blood pressure monitor to \$249.95 for Quell.

The real growth potential is from the health care provider community, according to digital health suppliers. Once data sharing and individual health care management take off on the professional side, they could spill over into retail, with loyalty rewards and other incentives for those who track and are engaged in their health, some speculate.

"I see it all [medical and retail] as complimentary," asserts Steve Monnier, VP sales and marketing at iHealth Labs, in Mountain View, Calif. "It's about awareness and validation."

Companies like iHealth provide a full range of devices to capture health measurements that doctors need to manage patients' medical conditions.

The company's newest products are the wireless View wrist blood pressure monitor (SRP \$99.99) that adds a display for offline or online tracking, and a swimming activity tracker, Wave, priced at \$79.

Other devices coming on the market that are geared to health care providers and their patients include a spirometer that measures air flow; iHealth Rhythm, a wearable ECG monitor; and iHealth CardioLab, a diagnostic system that calculates several markers for early detection of cardiovascular disease. All of these tests can be carried out remotely at home as part of telemedicine.

"The ability to seamlessly tabulate and transfer data between devices and applications and caregivers simply did not exist even a few years ago, and it has dramatically changed the way people can now manage their own health care," says Mei-Mei Stark, director of consumer health marketing for A&D Medical, based in San Jose, Calif.

A&D has designed a WellnessConnected platform that allows end users to pull together the biometric data they collect with A&D devices in one place, as well as to use partner devices to pull in activity-tracking and blood glucose level data.

"Much of our strategy is grounded in the ability for retailers to promote and merchandise an ecosystem consisting of multiple devices all connected to a single mobile app," explains Stark.

### Containing Costs

Driving the advanced technology is an out-of-control health care system, notes IHS' Roashan.

U.S. health care costs rose to \$3 trillion in 2014, 17.5 percent of gross domestic spending, according to the U.S. Centers for Medicare and Medicaid Services. Increases in chronic diseases, an aging population and more insured people are a few of the reasons for the soaring costs.

### IoMT's Drive to Health

All big health-device companies are scrambling to form partnerships to find the best health care solutions among the Internet of Medical Things (IoMT).

Ultimately, as technology increasingly pushes the boundaries of health care, devices could eventually go away, according to some prognosticators.

One trend is a consolidation of several tracking devices into one multifunctional device. Chicago-based IRI reports that sales of blood pressure kits grew 3.4 percent to \$212.2 million and glucose meter sales slipped 35 percent to \$292.8 million across all food, drug and mass channels for the 52-week period ending March 20.

A look at newly released or about-to-be-released blood glucose and blood pressure meters from two top-selling brands indicates the current direction of the health monitor device industry.

At this year's Consumer Electronics Show in Las Vegas, Omron Healthcare, the Kyoto, Japan-based company that introduced the first digital home blood pressure monitor 50 years ago, introduced the Project Zero line of wrist and upper-arm blood pressure monitors.

The medical-grade devices do more than track blood pressure: The wrist monitor, which looks like a smartwatch, provides physical activity and sleep data in real time, while the arm monitor tracks hypertension levels and detects irregular heartbeats.

Omron has also released the Connect app to work seamlessly with Bluetooth smart monitors and enable easy data transfer to health care providers.

Milpitas, Calif.-based LifeScan, a Johnson & Johnson Diabetes Care Cos. brand, has released its Onetouch Verio Flex blood glucose monitor (SRP \$19.99), with ColorSure technology designed to easily convey blood sugar results. The device works with Bluetooth and connects with the OneTouch Reveal mobile app.

LifeScan is also collaborating with WellDoc, a Baltimore-based digital health company, to integrate its new device with WellDoc's BlueStar product, the first FDA-cleared digital therapeutic for adults with type 2 diabetes. The integration would provide patients with additional smart monitoring tools and real-time motivational, behavioral and education coaching.

As health care providers are pressured to get their costs under control, the focus is shifting to individualized health care and prevention in which quality biometrics become essential.

As far as consumer demand for mobile health devices, according to iHealth's Monnier, the industry has reached middle ground after early adopters. "We haven't seen a huge influx of adoptees across the board."

One retail pharmacist, who works in a low-income area, agrees. "I don't see it being much of an impact," she notes. "I can barely get patients to commit to signing up for text messages to remind them to pick up their medications."

That is expected to change in the next several years, however, as the health care industry begins using health data from health-monitoring devices to improve patients' well-being and outcomes, thereby lowering costs. **PG**

# The Trade Pundits



**Freshness is the most important component of customer decision-making in the category and this is unlikely to change.**

— K. Ravindranath

GM, Head – Buying & Merchandising (Fruits & Vegetables)

## ROLE AND RESPONSIBILITY

**K. Ravindranath:** FnV category is one of the most profitable categories at Heritage Fresh. I was instrumental in establishing and scaling up the Fresh category at 132 plus stores across Hyderabad, Chennai and Bangalore. This vertical delivers about 1/5th of our total business at Heritage Fresh.

Delivered one of the best gross margin return on floor space and lowest dump and shrink among all organized competitors in supermarket format; Supervised the complete supply chain operations; delivered approximately 60% of the produce by volume sourced directly from farmers/aggregators.

**Experience in retail:** 12 years of direct association with the industry.

**Area of specialisation and excellence:** Agribiz, Buying & Merchandising & Retail Marketing.

## Most interesting thing about your job:

Opportunity to build a successful fresh business in the Indian modern retail context that is instrumental in driving the business/format's profitability.

## Pramod Onkarappa:

- Operating profitable business model
- Buying & Merchandising
- Ensure high quality standards & hygiene practices
- Customer delight

**Experience in retail:** Coming from a strong sea food industry background and with retail experience of 4.5 years, and overall experience of 16 years.

## Most interesting thing about your job:

As an everyday business, every transaction is an opportunity.

## Area of specialisation and excellence:

- Subject matter specialist
- Efficient procurement
- SOP development and implementation
- Right sourcing
- Catering to customer needs
- Category expansion & penetration

## SOLUTION TO CHALLENGES

**K. Ravindranath:** Finding and retaining talent with an attitude for business in Fresh category; finding suppliers who understand our vision for Fresh business and be a part of it.

## Pramod Onkarappa:

- Need to be more proactive as its not an organized sector
- Less control on external factors like seasons / natural calamities, etc.
- Groomed and trained CSAs as butchers (skilled unorganized labourers) to overcome attrition

## CONTRIBUTION TO THE CATEGORY

**K. Ravindranath: Unique procurement strategy:** Two separate teams (category & IPH) driven by our own and independent PnL to help us buy at the right/lowest price, thus enabling to deliver best margins while keeping our selling prices low.

**Farm procurement:** Over 70% of all bulk/seasonal SKUs sourced directly.

**Best merchandising:** 40 per cent plus penetration. Best-in-class range – 120 plus SKUs at top 15 stores. About 90 SKUs in other stores.

**Market led pricing strategy:** All selling prices are fixed after benchmarking about 5-6 competitors on a daily basis.

**Right indenting & right discounting:** Aided indent, system indent and system driven discounting.

**FnV champion program:** Dedicated & knowledgeable champs for handling FnV in shops.

**Value pricing:** Consistently our selling prices are cheaper than most competitors on key perception driving skus (Basket of 15-20 skus).

**Quality assurance:** Quality Checks at every stage to ensure only better than market quality and fresh material is delivered to every customer.

**Safe fruits:** All fruits sold by us are safely ripened in our ripening chambers.

**Dependable & frugal supply chain:** Same DC premises and same vehicles are used for FnV in the morning and FMCG in the afternoon/evening to keep deliveries costs frugal.

**Rigorous dump & shrink monitoring:** To control FnV supply chain losses to under 6.5 per cent. Consistent delivery of best net margin



**Fresh ideas and freshness will always be the mantra to win the customer's heart.**

— Pramod Onkarappa

Senior Business Manager –Fish & Meat, SPAR Hypermarket

percentage amongst organized retailers at 22 per cent for last three years.

**Stable and committed team:** I take personal interest in grooming all team members in the category, including management trainees. We provide adequate scope for learning, failure, contribution and growth. FnV category team at Heritage Fresh has one of the lowest attritions in the company.

**Pramod Onkarappa:**

- Direct sourcing from source / farm – to ensure freshness & cost benefit
- Developed infrastructure to store, process and dispense – best in industry
- Induction of imported range of chilled fish
- Live fish counter (Koi mach & murrel)
- Loose dry fish counter – solution for all seafood
- Live marination counter
- Catch of the day, theme based offers & Fresh Wednesday as promo tool to highlight the offerings
- Integrating cross merchandize & category adjacency (masalas & eggs )
- Special focus on exotic range
- Customer edutainment on recipes and usage of the products
- Ice packing for customers to maintain cold chain until it reaches kitchen
- Making SPAR as a destination for fish & meat

**Learnings and experience from this sector:**

As there are limited options and range that one could offer in Fish & Meat, the only way to expand and reach out to more customers is through value added products and helping them buy. Portfolio enlargement has been a great learning and Spar gave ample freedom to explore, experiment and execute.

**CONSUMER BUYING PATTERNS**

**K. Ravindranath:** Freshness is the most important component of customer decision making in the category and this is unlikely to change going forward. Fruits consumption is likely to increase even further and the trend of Indian customers buying lots of exotic fruits like Kiwis is likely to open up avenues for other new/foreign/exotic fruits to enter the Indian market.

**Prediction of future trends:** I see customers who are short on time actively shopping value added/ processed/cut fresh fruits and vegetables and also organic FnV is likely to gain increased customer acceptance going forward.

**Career Goals:** To be able to deliver the freshest possible produce to customer at all times on all days through our stores and also to make a meaningful impact in improving farm incomes



**Your top sellers:** Fruits contribute to about 59% of our sales. Top sellers would be Apples, Pomegranates, Mangoes, Bananas etc., In vegetables top sellers are Onion, tomato and Potato.

**Pramod Onkarappa:** Understanding the growing need of customers from various geographies and offer them their choice in the freshest possible way. There is no “one size fits all” in retail.

**Prediction of future trends:** Fresh ideas and Freshness will always be the mantra to win customer hearts. Consumption would only increase with growing trend on home delivery and online solutions, in which SPAR has already ventured.

**Career goal:** Customer delight, going that extra mile in every stage to better her experience.

**APPROACH TO BUYING FROM LOCAL SMES**

**K. Ravindranath:** Most of the fresh merchandise is sourced from SMEs only. SMEs are the driving force of any fresh supply chain in India.

**Your supplier base:** We have been adding about 10-15 new suppliers every year

**Criteria for sourcing new suppliers:** He/She should be fully compliant with all licenses; should be able to deliver produce consistently as per our specifications at a competitive price.

**Pramod Onkarappa:** Consistent quality; willing to adapt and learn; transparent transactions; should act like a true partner in giving customer that Wow experience. **PG**



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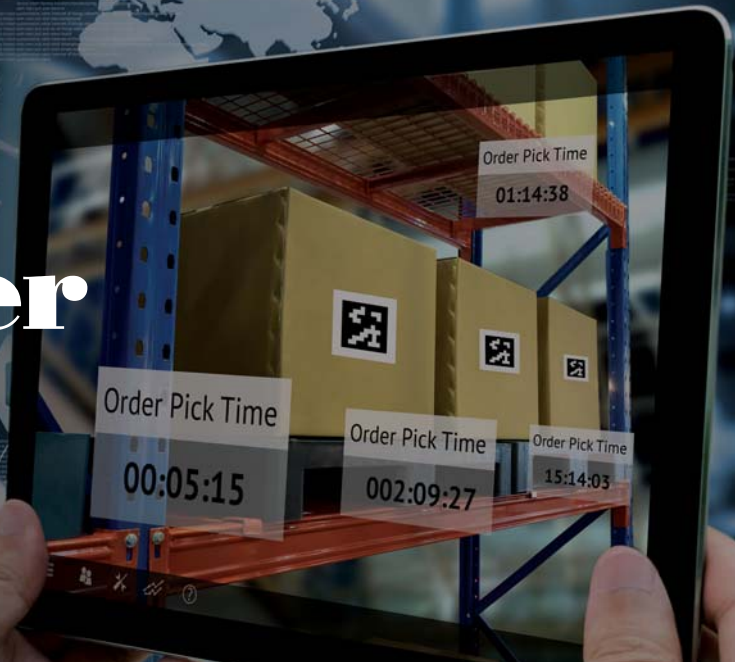
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# Force Multiplier

Five ways IoT adds value to manufacturing and field mobility in the food industry

By Ryan Goh



**Companies in the food industry have to take advantage of proven traceability tools and techniques to improve food safety and tighten their own operations by driving out excess inventory, storage, and handling costs.**

**T**he proliferation of devices linked to manufacturing and mobility processes has led to an explosive increase in the available data. Gartner predicts that the number of connected devices will reach 25 billion by 2020. A study by IDC estimates that a good portion of the digital universe will be populated by mobile devices and its users – from 17% in 2013 to 27% in 2020. However, much of the information generated in the digital universe may be disjointed across the enterprise, making it difficult to obtain a real-time view of assets, people and transactions.

When this decentralized scenario is seen from the perspective of an enterprise, with countless devices running disparate operations, inefficiencies are bound to mount. This scenario leaves enterprise workers incapable of harnessing value from their data. Food manufacturers in APAC, accounting for 39.9% of the global market share in packaged foods (Source: TechNavio), are quickly catching on to the value of using Internet of things (IoT) solutions and cloud technology to manage their processes and become supply chain visibility nodes.

According to the 2016 Global Food Security Index, India ranks 75th for food quality and safety and, there is much opportunity to improve safety standards. Companies in the food industry have to take advantage of proven traceability tools and techniques to improve food safety and tighten their own operations by driving out excess inventory, storage, and handling costs. By capturing these data feeds and turning them into actionable insight, they can gain enterprise asset intelligence—resulting in more informed decision making and more efficient

and accurate performance. By leveraging enterprise asset intelligence, manufacturers and mobile workers can add value in the following areas:

## 1 WAREHOUSE INVENTORY

The efficiency of a warehouse directly impacts the cost of doing business, level of customer service and the ability to compete in the food business. Mobile solutions and the ability to track inventory data can do wonders for performance. With these devices and an IoT solution in place, manufacturers can give their physical assets a digital voice by capturing and sharing the mission – critical data across the cloud. By doing so, food manufacturers can ensure they have the right goods in the right place—ready to be delivered to the right location.

This asset intelligence helps improve efficiency by identifying areas where operator-waiting time, defects, over-stocking or production waste can be reduced. Moreover, this intelligence enables food manufacturers to know where to dedicate time to improving certain processes that lie with the food grower, shipping or packaging chains to enable easier tracing throughout the product lifecycle. The ability to make these more informed, analytical decisions is how food manufacturers will drive productivity and improvement.

## 2 ASSET MANAGEMENT

Without a direct line of sight into their location and materials handling equipment, the potential for loss, delay and delivery error is vast. Solutions that integrate mobile scanning devices and passive or active RFID tags allow companies to quickly track



the location, motion and state of their materials and assets, allowing them to devise plans to reduce this waste. This will allow manufacturers to determine if the source of a contamination occurred at the grower, or was introduced within the distribution process, and which stakeholders might be affected. A company can then trace its shipments and conduct a highly targeted recall by contacting only those customers who received affected products, so that it can be completed quickly, with minimized cost, and without having to pull unaffected products from store shelves.

Though mobile devices alone can track assets, it is the asset intelligence afforded by an IoT solution that puts this visibility into context at a faster, replicable and more accessible rate. Sharing data across cloud-based applications allows manufacturers to have a centralized location that provides real-time insight into an organization's asset usage and needs. This keeps materials handling, labor and energy costs to a minimum and helps manufacturers ensure they have the right materials in the right places to keep their business momentum going.

**3 QUALITY PROOFING**

With quality applications deployed via mobile devices, manufacturers can improve the speed and accuracy of their quality checks. The capture of quality data can be automated to ensure that customers receive the right products every time and improve customer satisfaction and retention. Production control systems enable food manufacturers to isolate quality or compliance problems at the lot level. By making lot-level traceability available throughout the supply chain with a simple barcode scan, businesses can recall specific quantities and shipments wherever and whenever a drop in the quality of the product is detected.

This degree of traceability limits the burden of logistics handling and administrative costs, so recalls can be resolved quickly and efficiently. Mobility can improve quality beyond the production line since product verification can be conducted at virtually every step of the process. This will ensure inventory is readily available and all orders fulfilled correctly.

**4 WORKFORCE MANAGEMENT**

Workers responsible for inventory management or field service need access to real-time information in order to make real-time decisions that impact performance. Mobile solutions can provide this insight from anywhere, allowing workers to communicate and facilitate processes regardless of where they may be stationed at. As a result, managers can be more productive throughout the day, with the ability to stay on the plant floor or central office as needed to ensure seamless operations but still have access to the information they need, when they need

it. In return, any asset intelligence collected from these interactions arm manufacturers with the right insights to optimize their use of the data.

**5 FIELD SERVICE**

To deliver superior customer service, it is important to have the right route person at the right place and time, with the right equipment. Mobile devices alone have impacted service providers like delivery drivers – these handy tools help improve their image as brand ambassadors to their distributors or retail stores. As the IoT continues to expand, these devices are a critical component to enabling field mobility.



**Though mobile devices alone can track assets, it is the asset intelligence afforded by an IoT solution that puts this visibility into context at a faster, replicable and more accessible rate.**

The increased adoption of Mobile-to-Mobile (M2M) connectivity is enabling field personnel to gain actionable insights that enable them to better interact and communicate. For example, they can be more proactive by responding to traffic and weather conditions so they can prepare for delays or use alternative, safer delivery routes.

Manufacturers and mobile workers – the unsung heroes of invention and innovation – will continue to build stronger economies in their organizations, communities and around the world, as their services keep everything moving forward. According to a 2014 McKinsey report, the technology opportunity is still waiting to be harnessed – these technologies could increase profit margins and lower costs, potentially creating \$25 billion to \$45 billion of annual economic impact in ASEAN by 2030. Advances in mobile technology and the IoT are dramatically improving manufacturing and field mobility by empowering entire workforces. Enterprise asset intelligence, achieved through the adoption of these solutions, will enable them to pinpoint inefficiencies in real time and improve throughput—helping them build progressive plans to move toward innovation. **PG**



The writer is VP and GM, Zebra Technologies Asia Pacific.

# Making modern trade thrive

By Sunil Kumar



**Any consumer who comes to a MT store is looking to get a “pleasant experience” of shopping, besides also looking for good deals and discounts.**

Since the opening of the Indian retail sector two decades ago, we have seen the entry and emergence of several Modern Trade chains such as Big Bazaar, HyperCITY, Max SPAR, Star Bazaar, Walmart, Metro Cash & Carry, ABRL, etc. Today, there is a cluster of more than 2,500 MT stores owned by different chains at the national level. Together these chains do business of over Rs. 30,000 crore, which is just a small part of Indian retail market’s size of over Rs. 5 lakh crore. In fact, the share of MT continues to be about 8-10 per cent of the Indian Retail market. On the other hand, General Trade dominates with over 70 per cent share, especially in grocery. The e-commerce channel has fast occupied the electronic products space with over 45 per cent share of this market.

Also, most MT chains continue to either suffer losses or have very thin profits in spite of having more than 15,000 SKUs on shelves. To make things more difficult, e-commerce has been giving intense competition to MT chains and their managers. So what is the way out for MT to steer down the path of profitability?

Any consumer who comes to a MT store is looking to get a “pleasant experience” of shopping, besides also looking for good deals and discounts. But this is exactly where local kirana stores score over MT chains. They offer personal touch, discounts and also the convenience of home delivery. In order to forcefully take on General Trade at the

retail game, Modern Trade needs to focus on the following aspects:

- Adopt a more consumer focused and shopper-centric approach
- Educate the consumers about the perceived benefits of products by having trained manpower at shelves
- Minimize the waiting time for billing, especially during the peak seasons
- Rationalize the SKU portfolio
- Equip middle and line managers with the latest updates on new food guidelines, recipes, origin of products, and related information
- Cut down on wastage, in-store damages, etc.
- Offer ‘personal touch’ to consumers
- Focus on more freebies for consumers instead of just putting pressures on suppliers/companies for higher listing fee and discounts
- Use environment friendly and innovative ways out to cut down on electricity bills and other utility expenses
- Lay special focus on herbal and natural category
- Improve storage and ambience of F&V sections

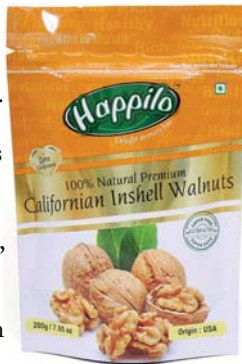
If all the above measures are implemented in earnest, it will, to my understanding, lead to at least a 20 per cent jump in sales, and a marked improvement in productivity. **PG**

The writer is General Manager-Organic, Amira Pure Foods Private Limited. Views are personal.

# what's next

► **Happilo introduces California pistachios & walnuts**

Leading dry fruits brand Satvik International has recently come up with a new range of California nuts. Available in two variants, these in-shell walnuts and in-shell pistachios make for a perfect healthy gifting options. These pistachios and walnuts are rich sources of vitamins, minerals, fats and proteins. The products are available at e-commerce sites and major modern trade stores across India.



► **Creteca introduces Peri Peri French fries**

Creteca Food Industries has added a new Peri Peri flavour to its existing range of French fries. This fiery Peri Peri fries are coated with a delicious spice mix and are served with a ketchup. These combo packs come in a 50 gm pack for Rs. 40 and 24 gm pack for Rs. 20, and are available at all leading retail outlets.



▼ **Satvikko rolls out healthy snacks**

Satvikko, from the House of Rays Culinary Delights Pvt. Ltd., has come up with a new range of healthy makhanas by adding international flavours to Indian snacks. These healthy snacks come in three variants: pudina makhana, herb & cheese makhana and Peri Peri makhana. Priced at Rs. 30 for a 25 gm pack, these snacks are available at select retail outlets, [www.sattviko.com](http://www.sattviko.com) and other e-grocery portals.



◀ **Sri Sri Ayurveda launches virgin coconut oil**

Sri Sri Ayurveda has introduced virgin coconut oil. This organic coconut oil is 100 per cent natural and is made using the cold-pressed technique. Enriched with goodness of nature, this is can be used for cooking purposes as well as for personal care. It comes in a unique bottle pack of 100 ml and is priced at Rs. 150.



▼ **Snacking with a twist**

Instant pre-mix brand Moment's Industries has recently launched roasted peanuts and chana in a wide variety of flavours ranging from the classic Indian spices such as hing jeera, lime pudina, chilly garlic to the international favourites like Wasabi, Jalapeno, etc. These products are available in easy-to-use packs of 35 gm and 140 gm, and are priced at Rs. 10 and Rs. 55 respectively. The products are available at all leading retail stores.



▲ **VKC Nuts launches healthy Spanish corn nuts**

VKC Nuts, one of the India's largest processor of the nuts and dried fruits, has launched healthy Spanish Corn Nuts under the brand name Nutraj Signature. If you feel a crunchy salted craving coming on, make sure you have healthy Spanish corn nuts with you. These corn nuts come in 17 grams sachet priced at Rs. 30 & 250 grams jar priced at Rs. 299. These corn nuts are available at [Nutraj.com](http://Nutraj.com) and all leading online portals across India.

# Organised Retail – *Reasons to Celebrate!*

**T**he grand success of the IPO of D-Mart Retail (Avenue Supermarts) has sparked new life into this sector where most retail chains were till now busy consolidating or moving cautiously with their growth plans.

D-Mart's extremely successful market debut has a resonating message: The Indian retail industry has emerged as one of the most dynamic and fast-paced industries due to the entry of several new players. Today, the sector accounts for over 10 per cent of the country's gross domestic product (GDP) and contributes about 8 per cent of the employment. India is the world's fifth-largest global destination in the retail space.



“  
**India is now becoming a very important market and in terms of investment, it will be one of the countries where we will invest the most in the future.**

— **Damien Veilleroy**  
Head – Asia, Metro AG

## Market Size

India's retail market is expected to nearly double to US\$ 1 trillion by 2020 from US\$ 600 billion in 2015, driven by income growth, urbanisation and attitudinal shifts. While the overall retail market is expected to grow at 12 per cent per annum, modern trade would expand twice as fast at 20 per cent per annum and traditional trade at 10 per cent.

India's Business to Business (B2B) e-commerce market is expected to reach US\$ 700 billion by 2020. Online retail is expected to be at par with the market value of physical stores in the next five years.

India is expected to become the world's fastest growing e-commerce market, driven by robust investment in the sector and rapid increase in the number of internet users. Various agencies have high expectations about the growth of Indian e-commerce markets. Indian e-commerce sales are expected to

reach US\$ 120 billion! by 2020 from US\$ 30 billion in FY2016. Further, India's e-commerce market is expected to reach US\$ 220 billion in terms of gross merchandise value (GMV) and 530 million shoppers by 2025, led by faster speeds on reliable telecom networks, faster adoption of online services and better variety as well as convenience.

India's direct selling industry is expected to reach a size of INR 23,654 crore (US\$ 3.54 billion) by FY2019-20, as per a joint report by India Direct Selling Association (IDSA) and PHD.

Indian exports of locally made retail and lifestyle products grew at a compound annual growth rate (CAGR) of 10 per cent from 2013 to 2016.

The size of modern retail in India is expected to double to INR 171,800 crore (US\$ 25.7 billion) from INR 87,100 crore (US\$ 13 billion) in three years driven by omni-channel retail.

## Investment Scenario

Indian retail trading has received Foreign Direct Investment (FDI) equity inflows totalling US\$ 935.74 million during April 2000–December 2016, according to the Department of Industrial Policies and Promotion (DIPP). 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.

## Road Ahead

E-commerce is probably creating the biggest revolution in the retail industry, and this trend would continue in the years to come. 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.

Both organised and unorganised retail companies have to work together to ensure better prospects for the overall retail industry, while generating new benefits for their customers. Nevertheless, 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](mailto:rakeshgambhir@imagesgroup.in)



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