

Packaging

Why aseptic liquid packaging is best for perishable dairy and beverage products

Page 10

Category Watch: Beverage

Decline in CSD consumption is helping juices and dairy drinks to grow and innovate

Page 20

Tea Trends

Drinking occasions for tea can expand beyond the functional into mental wellness

Page 46

PROGRESSIVE GROCCER

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INDIA EDITION

Page 12

“WE DELIVER PRODUCTS FASTER TO OUR CUSTOMERS THAN ANY OTHER FORMAT”

— DEVYANI JAIPURIA, MD, J MART



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The retail sector in India, both organised and unorganised, employs 40 million people, out of which nearly 85 per cent are front-end staff. The imminent entry of global marquee brands such as Apple and IKEA into single brand retail will present more opportunities for front-end jobs in shops and stores. Employment opportunities in retail will grow further if States adopt the Model Shops and Establishment Bill passed last year, which allows shops to remain open 24x7.

As the retail sector expands and grows, it is important for the industry to recruit the right kind of people and draw upon the best talent. Retailers should look for people who are good at organizing, managing the back-end, indenting for stocks, making reports, creating rosters at one end and simultaneously have endless energy to interact with customers at the front-end. Recruiting people with the right skills and aptitude for front-end jobs has far reaching implications for retail businesses. Sales personnel who are plain bored of their jobs or complete misfits in roles that demand presence and engagement can often be that critical under-performing link in stores.

Today, when customers increasingly have the option to buy online, brick and mortar retailers need to use the opportunity provided by the visit of the customer to their store as an opportunity to leave a positive influence on them to return again. To make this possible, it is important to consistently recruit people that can add value to their business and also ensure that they leave a positive impression on the customers they interact with.



Amitabh Taneja
 Editor-in-Chief

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COVER STORY

12



Devyani Jaipuria
MD, Jmart

“We deliver products faster to our customers than any other format.”

Jmart Pvt. Ltd. is a chain of convenience stores in Delhi-NCR promoted by Alisha Retail Private Limited, a part of RJ Corp – the largest bottler for Pepsico – with diversified interests in beverages, food, beer, milk, ice-cream, stem-cell, real estate and education. One of its associate companies is Devyani International Limited, which runs the popular south Indian QSR chain Vaango and is the largest franchisee for Pizza Hut, KFC and Costa Coffee in India.

50 ENERGY DRINK

Switch to New Energy

A growing consumer focus on fitness and health has propelled energy drinks from being a niche product to one of the fastest growing products in the global drinks market



10 PACKAGING

Aseptic packages best for dairy, beverage products

Aseptic liquid packaging allows a liquid product to remain sterile and free from micro-organisms for a longer period of time without refrigeration.



20 CATEGORY WATCH: BEVERAGE

Cool refreshments to beat the heat

A decline in carbonated soft drink consumption is helping other beverage categories – like juices and dairy drinks – to grow and innovate. Most beverage manufacturers say that the larger trend is to produce functional beverages that can become part of a consumer’s daily lifestyle.



46 TEA TRENDS

Tea can be positioned as ‘mental well-being’ beverage

There is a need of brands to educate consumers about the benefits of tea, and how new tea infusions claim to improve mental well-being.

IN EVERY ISSUE

60 WHAT'S NEXT

Food, Beverage & Non-food Products

62 COLUMN

Clear the air on FDI in retail



56 INDUSTRY TALK

How will GST cookie crumble for retail?

Industry stalwarts share their views on how the retail industry will perform in the aftermath of GST roll-out and how the industry is gearing to face the initial hiccups arising from its implementation.

58 AGRI-TECH

Supersizing nutrition with superfoods

CFTRI has developed a number of innovations that augment the consumers’ health and wellness. One such example is developing agro-technologies for superfoods such as chia, quinoa and teff to grow in Indian conditions.

Corrigendum

In the May issue of Progressive Grocer, the article titled ‘Food Additives and Regulations’ by Manish Veeramani mentioned his designation as Asst. Manager - Quality, Taste’L Fine Food. It should have been Lead Auditor & Technical Reviewer - Food, Bureau Veritas India Pvt Ltd.



“We deliver products faster to our customers than any other format.”

→
Devyani Jaipuria
MD, Jmart

Jmart Pvt. Ltd. is a chain of convenience stores in Delhi-NCR promoted by Alisha Retail Private Limited, a part of RJ Corp – the largest bottler for Pepsico – with diversified interests in beverages, food, beer, milk, ice-cream, stem-cell, real estate and education. One of its associate companies is Devyani International Limited, which runs the popular south Indian QSR chain Vaango and is the largest franchisee for Pizza Hut, KFC and Costa Coffee in India. Progressive Grocer spoke to Devyani Jaipuria, MD, Jmart, about the company’s astounding success in rolling out 100 stores in two years and carving a formidable niche in the small retail format by dint of its dynamic product assortment and their quality, a bouquet of utilitarian services as well as offering customers unmatched value for money and value for time.



➔ **JMART: FACT BOX**

<p>Parent company: Jmart stores are promoted by Alisha Retail Private Limited, a part of RJ Corp</p> <p>Launch of first store: April 2015</p> <p>Headquarters: Gurgaon</p> <p>Retail format: Convenience</p> <p>Total retail area under operation: About 40,000 square feet</p> <p>Number of stores: 100 stores</p>	<p>Cities/ towns where the stores are: Gurgaon, Faridabad, Noida, Ghaziabad, Greater Noida, Sonipat, Bhiwadi, and Dharuhera</p> <p>Average size of stores: The median size of stores is 450 square feet carpet area</p> <p>Average footfalls per day/ month: Currently servicing about half a million customers per month</p> <p>Same store sales growth: Stores are growing in the range 10% to 30% month on month, depending upon the age of the store</p>
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What is the customer proposition and marketing positioning of Jmart stores?

Jmart Pvt. Ltd. is a chain of convenience stores offering good quality products, an assortment relevant to the daily shopping needs, neat and clean stores, great service, and value for money to our customers without compromising on their comfort.

Our mission is to make life a little easier for our customers by being where they need us and whenever they need us. That is why we are located right next to the home or office of our target customers, and have extended hours of operations with some of our stores open round the clock.

With the retail landscape changing drastically in recent times, the customer value proposition has also started changing significantly. It is no longer just about value for money but also about value of time, which is a prime consideration with shoppers today. In times to come, convenience of shopping will become an even more significant factor for customers in deciding the choice of their shopping destination.

What advantages have your stores been able to get by their focused location strategy?

Our mission is to make shopping convenient for our customers and so we locate our stores in gated residential complexes, inside large office complexes, or Metro stations. This ensures that whenever a customer needs to buy a product or service, we are the closest and the most convenient option for him/her. This is particularly important in the case of daily need categories like milk, fruits and vegetables,

dairy, bread and eggs, etc. And also categories where the customer requires instant gratification as in the case of products like ice cream, beverages, snacks and fresh food. Our location strategy also allows us to deliver products to our customers faster than any other format.

As a matter of fact, by virtue of being located inside gated complexes, parents allow their young children to shop with us independently. This also shows the trust we have been able to garner for our fair dealing and transparency.

What is the typical customer profile of shoppers in your store?

Our location strategy puts us in close proximity of our customers and also helps us define and know our

Cool Refreshments to Beat the Heat



As in other parts of the world, health & wellness is now a major growth driver within packaged beverages in India. Carbonated soft drink consumption is on the decline, which is helping other beverage categories – like juices and dairy drinks – to grow and innovate. Most beverage manufacturers that Progressive Grocer spoke to confirm that the larger trend is to produce functional beverages that can become part of a consumer's daily lifestyle. Beverages that are positioned as 'sheer fun' are seeing a decline and at the same time there is an increase in demand for 'better for you' alternatives.

By Sanjay Kumar

The beverages category contributes 8-9 per cent to the total F&G market in India. With the entry of major international beverage players over the last few decades, the market has evolved and has made way for many new products, which have found an instant connect with Indian consumers. According to research conducted by IMAGES Group – the publisher of Progressive Grocer India – the market for beverages in India is close to Rs. 195,000 crore and is growing at 20–23 per cent. This growth rate will take the category at three-and-a-half times its present size by 2020. However, India's per capital consumption of non-alcoholic beverage drinks is just about 5 litre, which is very low in comparison to the global average of 85 litre.

All constituent segments are witnessing growth at a healthy range of 20–25 per cent, which is the highest among all food groups. This growth can be attributed to the fact that the market for beverages is getting more segmented and niche than ever before. The emergence of various brands in all segments has given an unprecedented thrust to the category. Consumers can choose beverages of almost all flavors, colors, ingredients, health and nutritional values. The expanding products range is fuelled by the food processing sector and with its growth the category is bound to carry forward the acceleration.

Major beverage segments

The category can be divided into four broad segments – tea and coffee, occupying the largest market share; juices and flavored

drinks; packaged drinking and flavored water; and other nonalcoholic drinks including soft drinks, mango drinks, lemon drinks, chocolate drinks, etc. The lion's share of tea and coffee confirms that the category is still ruled by traditional beverages.

Another traditional segment having a significant share is juices along with other canned and bottled beverage options. In spite of the large financial muscle powers and unparalleled distribution advantage, the global beverage giants are able to hold just a five per cent share in the category. About four per cent of the total beverages market is formed of the juices segment, which is growing at 20–25 per cent and is expected to grow almost four times bigger in the next five years. Today, Indians are spending at an average just Rs. 6 per month on juices, which is less than what they are spending on other beverages. The juice segment has been somewhat impacted by the emergence of other flavored drinks, which have become an easy alternative.

Three-fourths of the juice market is urbanised. The high consumption of juices in these markets is the result of higher health awareness, availability of branded juices, urban lifestyle, boom in modern retail and mall culture, and influence of globalisation in the F&B space. People today realise the importance of healthy food and they are demanding packaged juices, which can easily be carried along while on the go.

The juice segment has two components – packaged juices and fresh juices. The packaged juices component has a higher growth rate since it is easily available all the time. However, not more than 15 per cent of the segment is dominated by packaged juices. The packaged juices can be further classified into fruit drinks, juices and nectar drinks, which are recent additions. Fruit drinks have one-third fruit content in them and sell the most. Fruit juices, on the other hand, are 100 per cent composed of fruit content, and claim a 30 per cent market share at present. In contrast, nectar drinks have anywhere between 25 and 90 per cent fruit content, but account for only about 10 per cent of the market. The rising number of health-conscious consumers is giving a boost to the fruit juices segment; it has been observed that consumers are shifting from fruit-based drinks to fruit juices as they consider the latter a healthier breakfast or snack option.

According to **Hemant Malik, Divisional Chief Executive, ITC Foods Division, ITC**, “The juices



and nectars market alone is estimated to be over Rs. 2500 crore in terms of consumer spend. The category is largely urban-centric with rural contribution less than 10 per cent of the overall juices industry. Given that the consumers are increasingly moving towards branded packaged juices format, we see a huge potential in the category in the years to come. The category has been growing at a healthy double-digit CAGR in the recent years.”

Sharing his views on the beverages market in India, **Dhirendra Singh,**

CMD, Manpasand Beverages Ltd., says: “Growth in nectars and juice drinks is estimated to be at a faster pace vis-à-vis 100% juice as higher prices and stressful lifestyles may restrict the demand for the latter. Owing to this, we might see demand for fruit-based aerated drinks/beverages from the consumers. Lately, we have also seen the trend of a resurgence of traditional drinks. In the coming days, these factors will influence the beverage market in India.”

The culture of eating out has given birth to meal and soft drink combos, which Indian consumers are savoring to the fullest. This has given a much required boost to soft drinks consumption. They have become penetrative in almost all consumer segments from kids to college-going students to middle-aged couples. Soft drinks are no more a sunny hot day culture but have evolved as part of the meal, especially while eating out. The growing consumption of soft drinks has revolutionised the pack sizes also. From 300 ml bottles to 2 litre PET bottles, the players in the segment are servicing all consumption demands. The segment has made some significant achievements and penetration in the rural areas is definitely one of them. Industry observers say that rural areas account for 75 per cent sales of PET bottles.

Based on the consumption patterns, the soft drink market in India is classified into two segments.



“
Given that consumers are increasingly moving towards branded packaged juices format, we see a huge potential in the category in the years to come.

— **Hemant Malik**
Divisional Chief Executive, ITC Foods Division, ITC



“
Growth in nectars and juice drinks is estimated to be faster vis-à-vis 100% juice as higher prices and stressful lifestyles may restrict the demand for the latter.

— **Dhirendra Singh**
CMD, Manpasand Beverages Ltd

Tea can be positioned as ‘mental well-being’ beverage

The April 2017 Consumer report by Mintel highlights the need for brands to educate consumers about the benefits of tea, and how new tea infusions claim to improve the mental well-being.

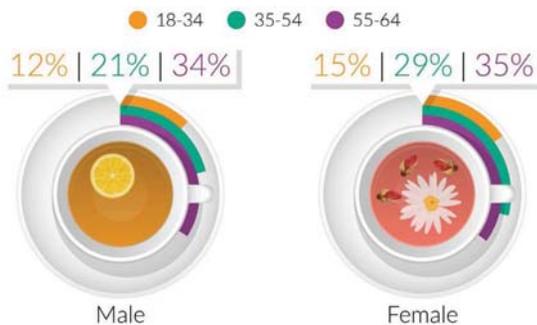
By **Ranjana Sundaresan**

Urban Indian consumers today are increasingly becoming pressed for time as they juggle work and personal responsibilities. Not surprisingly, fatigue has emerged as the leading health concern for Indians, with 22% of adults admitting that tiredness/fatigue is a concern, according to a Mintel commissioned study, conducted by Kantar IMRB. Among 45-64-year-olds, this number rose to 31%.



Mood-based descriptions indicate there is opportunity to expand the drinking occasions for tea in India beyond the functional and into the realm of mental wellness.

Figure 1: AGREEMENT WITH TIREDNESS/ FATIGUE BEING A HEALTH CONCERN, BY AGE AND GENDER, INDIA, JUNE 2016



Base: 3,029 adults aged 18-64
Source: Kantar IMRB/Mintel

Younger consumers in India are perhaps less affected by fatigue perhaps due to their lower levels of household and career responsibilities compared to their peers in more developed markets. In the UK, for instance, 54% of consumers often feel tired, rising to 62% of 25-34 year olds, according to Sports and Energy Drinks – UK - July 2014.

Younger Indians are also likely to be less affected by the issues caused by being constantly connected to their devices, which research shows has an adverse impact on sleep. Smartphone ownership among 16-34-year-olds in the UK was 90%, according to

Digital Trends Winter - UK - December 2016. In comparison, 48% of 18-34-year-old Indian consumers owned a Smartphone.

Stress is another factor that affects a large share of the Indian population. This is evidenced by the fact that stress reduction is among the top motivations for Indian consumers to lead a healthy lifestyle. The importance of a healthy lifestyle is almost universally accepted (98%) by Indian consumers, and 32% of them are motivated to live a healthy lifestyle to feel less stressed out.

Consumers' working life has a strong influence on this, with only 21% of employed adults saying that they regularly maintain a good work-life balance. In fact, those in full-time employment are twice as likely as those who work part-time to try to lead a healthy lifestyle to help reduce stress (35% compared to 18%). Stress can also contribute to other aspects, such as increased anxiety and lack of sleep.

Tea brands are starting to focus on tea's link with emotional well-being

As stress and fatigue become more common in India, consumers will want solutions to help them cope. Many are turning to food and drink for help and emotional support, as explored by the Mintel



Trend Mood to Order. Among Indian adults who snack between meals, 28% said they did so to get an energy boost. In addition, consumers are turning to snacking for emotional reasons. Among Indians who snack, 27% said they did so to satisfy a craving while 10% did so because they were stressed.

In light of this, there is potential for tea in India to be positioned as an alternative to snacking between meals with solutions on two fronts – energy boosting and stress busting. Tea has always been linked with providing energy in India, in part due to the way it is consumed – with plenty of milk and sugar. This is also how major brands show the beverage being made in their advertising, and the positioning of the majority of tea launches remains linked to boosting energy.

More recently, tea launches have started to make claims that are linked to mood or mental wellbeing rather than just physical wellbeing. Black tea dominates the Indian market, and the majority of these products have black tea as their main ingredient.

Only a quarter of all tea launches included green tea as an ingredient, while only a tenth were

herbal teas during 2015-16. Green tea has lower caffeine levels than black tea, indicating that there is potential to position green tea as an ingredient to aid relaxation.

Figure2: LAUNCHES WITH SELECT MOOD-BASED DESCRIPTORS, TEA, INDIA, 2015-17*

Descriptor	Share of overall launches %	Share of overall launches with green tea %
"revive, refresh, rejuvenate"	60	14
"stress"	9	3
"calming or relaxing"	7	2
"uplifting"	2	1

* 2017 includes January to March

Source: Mintel GNPD

These more mood-based descriptions indicate there is significant opportunity to expand the drinking occasions for tea in India beyond the purely



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Switch to New Energy

A growing consumer focus on fitness and health has propelled energy drinks from being a niche product to one of the fastest growing products in the global drinks market.

By Abhinav Biswas

In 2017, the global energy drinks market stood at USD 55 billion and is projected to grow at a CAGR of 3.7% during the forecast period of 2017-2022.

There seems to be a growing acceptance for the consumption of energy drinks in the country. Affordability and visibility are likely to support impulse purchases and increase the frequency of consumption. Furthermore, increasing urbanization, rising disposable incomes and a growing culture for social gatherings among the Indian youth is fueling the demand for this category.

Both young, as well as old, are attracted towards these beverages, which promise to keep the consumers healthy and active. More than 50% of the world population lives in urban areas. A hectic lifestyle and an increase in disposable income coupled with a need for instant energy are expected to drive market growth over the forecast period (2017-2021). The global energy drinks market is expected to expand with steady growth rates during the forecast period. Still, the market faces certain challenges such as drunkenness, side effects, issues regarding caffeine and some norms related to food and safety, among other things. Today, the top trends in the market are the demand for sugar-free and organic energy drinks, low calorie energy drinks and integrating the product through sports events, etc.

Market insights

Energy drinks have transitioned from being a niche product to one of the fastest growing products in the global drinks market. This change has been brought about by a growing consumer focus on fitness and health. In 2017, the global energy drinks market stood at USD 55 billion and is projected to grow at a CAGR of 3.7% during the forecast period of 2017-2022.

Energy drinks are marketed as an alternative to carbonated drinks and therefore there is a significant rise in the number of people switching from carbonated drinks to energy drinks over the last few years. Clever marketing and branding will remain crucial to the success of energy drinks brands in the future. Consumers are consciously cutting down on the consumption of sugar-added drinks what with the number of diabetics rising. Thus, a massive opportunity is shaping up in the sugar-free energy drinks market. The obesity pandemic will shape up the low-calorie energy drinks market.

The competitive environment of the Energy Drink market

We can analyse the competitive environment of this market at five levels as described below. These are: The Bargaining Power of Suppliers and Customers;





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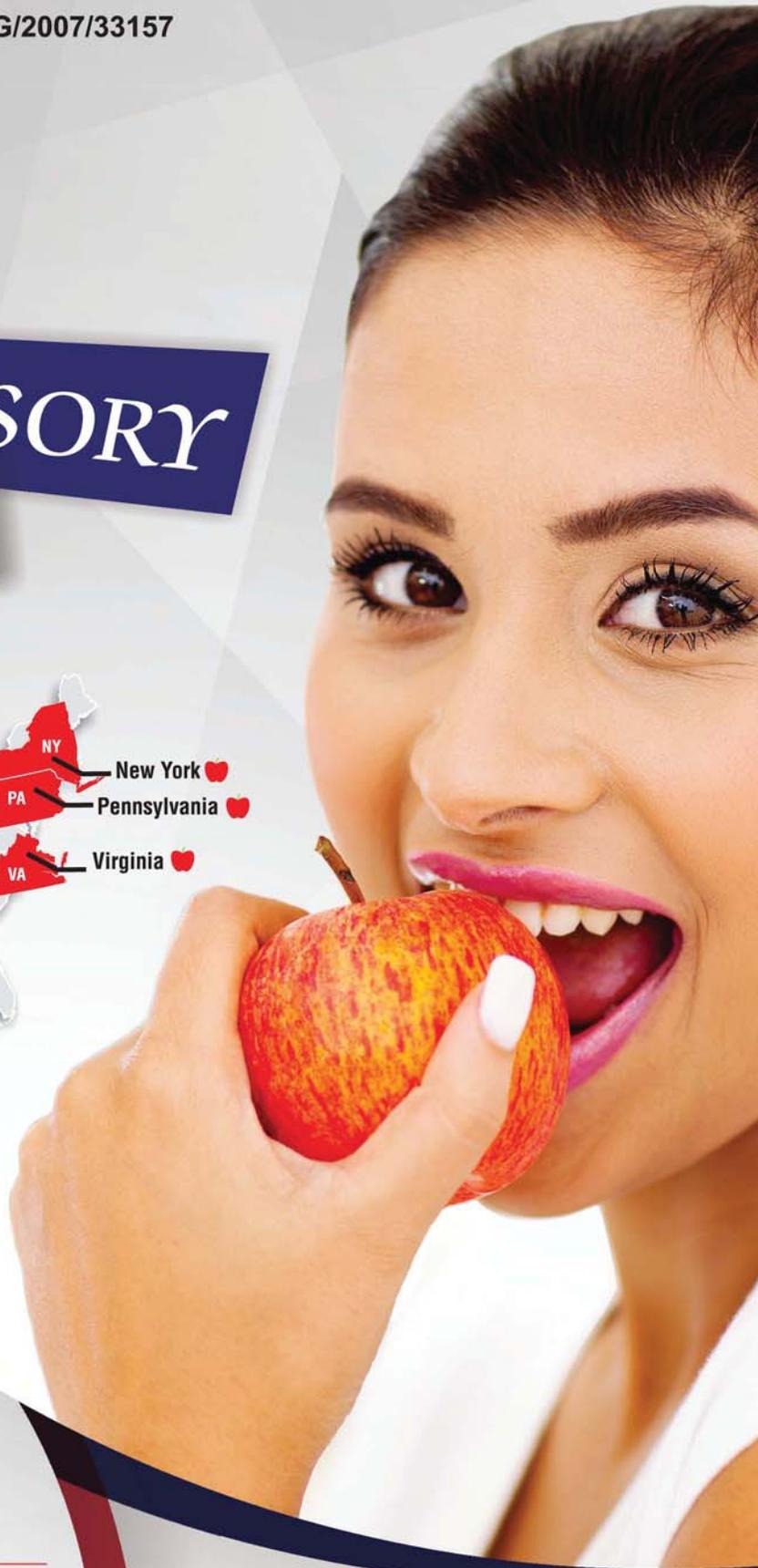


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