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# PROGRESSIVE GROCER

December 2017

Volume 11 Number 12 · Rs 100  
[www.indiaretailing.com](http://www.indiaretailing.com)

INDIA EDITION

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**WE WILL BE A  
₹1,000 CRORE  
PLUS RETAIL  
BRAND BY 2020**



L to R  
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As rural India gains heft in purchasing power, the ubiquitous kirana shops will make further inroads into the country's hinterland and reach places that remains out of bounds to modern retail. But the time has come for supermarkets to sally forth into many un-served or under-served districts of the country where the latent demand for modern retail service can be kindled. As transportation infrastructure and logistics across the country are improving steadily, the markets lying deep within the country can be profitably tapped by modern retail. Many retailers are now taking it upon themselves to develop personalized supply chain systems that ensure timely and nationwide delivery. On the other side, specialist companies with the know-how and expertise that comes with foreign equity participation, are increasingly making their presence felt.

These untapped markets can prove to be a fertile ground for modern grocers in India, many of whom are investing heavily in private labels to counteract the high costs associated with real estate and supply chain investment. Consumers in smaller towns and cities of India are price sensitive but highly value-conscious and private labels of modern retailers stand a bright chance of scoring high with the value-minded consumers of India's backlands. Yes, it will require an extremely well-honed and sharp strategy to overcome the deficiencies of supply chain, logistics, power, and other challenges inherent to these backwoods. But then, nothing comes easy and modern retail will have to invest early in the markets of little India in order to reap the market dividends down the years.

  
**Amitabh Taneja**  
 Editor-in-Chief

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Printed & published by S P Taneja on behalf of Images Multimedia Pvt. Ltd. Printed at Modest Print Pack (P) Ltd., C-52, DDA Sheds, Okhla Industrial Area, Phase 1, New Delhi - 110020 and published by S P Taneja from S-21 Okhla Industrial Area Phase - 2, New Delhi. 110020 Editor: Amitabh Taneja

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With nine grocery stores in NCR, the store chain has been able to build a base of loyal customers on the strength of its quality product offerings at reasonable price and unmatched customer service.





# Do's and Don'ts

Industry pros weigh in with tips for smarter logistics, warehouse efficiencies and more.

By Jenny McTaggart

**T**he tried-and-true grocery supply chain sounds simple enough in theory: Get products from the field or manufacturer to the warehouse, and finally to the store, as quickly and efficiently as possible.

But today's retail executives aren't finding the task easy at all, as they're constantly challenged with planning pitfalls, often unpredictable delays in shipping, important safety regulations that must be adhered to, and even trials in consumer marketing, particularly as it relates to how they can reach and satisfy mobile consumers who have more choices than ever before.

To help make things a little more manageable, Progressive Grocer has rounded up a quick list of "do's and don'ts" from professionals who work in various areas of the supply chain, including overall strategy and planning, transportation and logistics, and technology. Their insights will hopefully inspire

you not only to solve some of your most pressing problems, but also to discover some innovative ideas.

## Demand Planning

First and foremost, successful supply chain management requires thoughtful planning. **Mike Griswold**, research VP at Stamford, Conn.-based Gartner, offers the following advice to retailers as they contemplate their initial courses of action:

**Do** ensure supply ownership of the demand-planning process. Mature retail supply chains centralize the demand-planning process within the supply chain for the following reasons:

**Objectivity:** Buyers and merchants tend to have an emotional investment relative to the performance of an item, and therefore tend to show a bias toward over-forecasting. Ownership by the supply chain provides an objective, impartial view of demand expectations.



**End-to-end perspective:** Visibility of all three levels of demand gives the supply chain the complete end-to-end picture of expected demand aligning from the shelf back, across all sales channels, and improves the ability to effectively match demand and supply.

**Skill set alignment:** Buyers and merchants typically focus on assortment rationale, category strategy and the alignment of shopper preferences with merchandise selections, which are more qualitative skill sets. Demand planning requires a more quantitative focus that's more closely associated with work conducted by the supply chain.

Centralization within the supply chain leads to higher forecast accuracy and improvements in on-shelf availability and inventory productivity.

### Getting Logistics Right

Whether navigating the latest regulations of the Food Safety Modernization Act (FSMA), or evaluating specific modes of transportation, the job of getting food and other grocery items to stores, or directly to consumers, seems more daunting than ever. Here are a few tips from the pros:

**Mark Petersen**, director of global sourcing at Eden Prairie, Minn.-based Robinson Fresh, provided the following guidelines for transporting goods by air, land and sea:

**Do** mitigate risks with all parties involved in moving temperature-sensitive product — shippers, carriers, vendors, providers, etc. — by making sure they all understand the importance of maintaining a cold chain.

**Do** think strategically about carrier and shipper needs. If a shipper transports full truckloads of cheese to local retailers, they may be able to arrange for the same carrier to move empty cartons on the backhaul. The shipper not only solves a reverse-logistics problem, but may also reduce transportation costs now that the carrier has eliminated otherwise empty miles.

**Do** have a system of checks and balances in place during loading/unloading to minimize problems. With the implementation of the Sanitary Transport Rule of FSMA, many of these best practices are requirements for certain commodities. Throughout the process, be sure to inspect:

- Product temperature prior to loading
- Trailer precooling condition
- Condition of equipment prior to loading
- Proper container air flow while loading.

**Don't** forget to weigh all of the pros, cons and price of each transportation service before ruling any out — each comes with its own unique set of risks. Just because it's more expensive doesn't mean that you should abandon it immediately.

**Don't** overlook even the smallest details while planning. Bring every detail to the table — from acceptable temperature ranges and continuous temperature versus cycle settings to proper seals, contingency plans and equipment expectations, along with processes for returns and rejections. Even before product is loaded, every leg of the journey must have clear expectations to mitigate the added risk that comes with temperature-sensitive products.

From **Gregg Lanyard**, director of product management for transportation and logistics at Atlanta-based Manhattan Associates:

**Do** optimize continuously. Look for inbound backhaul opportunities with suppliers, and use transportation management system (TMS) technology for full visibility into inbound and outbound operations.

**Do** measure performance. Today's TMS offerings provide a plethora of data to ensure that you're tracking against a plan, and will allow you to drill into exactly what may be causing speed bumps in the supply chain.

**Don't** assume that your store delivery schedule from last year is the right delivery schedule today.

**Do** a continuous evaluation of store delivery routes, including dynamic versus static delivery options, store delivery days, and time windows to optimize outbound operations and reduce mileage.

**Don't** treat outbound transportation as a “one and done.” Continuous optimization is vital as stores open/close, supply networks change and transportation rates adjust to market conditions (i.e., fuel costs).

From **Tim Smith**, EVP at Irvine, Calif.-based Lineage Logistics:

**Do** use lean logistics ideals and procedures to optimize operations and save a significant amount of money.

**Don't** ignore small details, such as temperature variations on receiving docks and infrequent activities



“Continuous optimization is vital as stores open/close, supply networks change and transportation rates adjust to market conditions.”

— **Gregg Lanyard**  
Manhattan Associates







# “Our vision is to be a National retail chain with ₹1,000 crore plus turnover by 2020”

By Sanjay Kumar

With about 30 years in the food & grocery retail business, Hyderabad-based Ratnadeep Super Market has been able to carve a formidable reputation as a shopping destination that customers unfailingly identify with a rich and varied assortment of quality national and international products offered in a pleasant ambience and with customer friendly, reliable service.

Progressive Grocer spoke to Sandeep Agarwal, Managing Director, and Manish Bhartiya, Director, Ratnadeep Super Market Pvt. Ltd. about how the retail chain is looking to leverage its strengths for expanding its private label business, partnering with more brands in the food business and ramping up its footprint beyond Hyderabad to other regions in the country.

L to R  
**MANISH BHARTIYA & SANDEEP AGARWAL**  
RATNADEEP SUPER MARKET PVT. LTD.







### What do you consider the unique features of your store?

**Sandeep Agarwal:** Ratnadeep is unique and special in the supermarket store format. Our stores have the better advantage in terms of navigation of products, identification and user-friendly product planogramming. All our stores offer superlative customer convenience and a pleasant shopping experience. Also, we are known for the rich assortment/ choice of brands at our stores. The imported assortment/ SKUs/ merchandise are an added advantage with easy availability and proven authenticity of different brands compared with what is available in the general market and other stores. Our imported fruits/ vegetables and products in the regular segment come with the assurance of best quality, right quantity and price, which is our specialty. Our own staples and pulses are also known for better quality and reliability and are the best in the market.

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

**Sandeep Agarwal:** Our customer base is majorly SEC “A” and “A+” with a 100% conversion rate of shopping at all our stores. Quick checkout, great ambience and a wide range of assortment are our stores’ unique value proposition. The multiple choices of brands at our stores, availability of a wide variety of assortment and the fact that we run regular promos offering prices that are comparable to the best in the market makes us stand apart from other retailers in the city. All our stores are centrally air conditioned with best tools for merchandise navigation and selection, uniform planogramming, and multiple billing points for faster check-out from the store. We are known for offering the best quality and reliable services in the industry since the past 30 years.

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

**Manish Bhartiya:** Our specialty – our own brand of grocery/ fruits and vegetables – and the imported FMCG brands are the top sellers. In terms of sales, grocery/ fruits & vegetables/ imported assortment contribute about 30% plus of our overall revenue pie.

### Have there been successful instances where you have partnered with brands and there was a favorable impact?

**Sandeep Agarwal:** In our stores, we strive to achieve a strong bonding with the locality catchment. Apart from relying on our own assortment, we regularly partner with popular FMCG companies and approach many locally known brands such as Agra Sweets, Almond House, and many more.



# India's nutraceutical market to reach 8.5 billion USD by 2022

Thanks to the burgeoning affluent middle class that is increasingly becoming health conscious and aware of the positive impact of using dietary supplements, the nutraceutical market in India is on the cusp of a break-out. This new health phenomenon among young Indians is encouraging many international and local players to enter the nutraceutical segment whose percentage share of the overall health and wellness market is growing at a rapid clip.

By **Sushil Khaitan**

**N**utraceuticals are a relatively new category in India. Yet the market has witnessed exponential and unprecedented growth in recent years. A primary reason for this upsurge is due to the fact that the newer generations are increasingly well-informed regarding health concerns. People today are proactively taking preemptive steps to remain fit and healthy, which has helped put the spotlight on preventive health care. The health-conscious young adults of today are also more open to the idea of “nutrition in a pill”. They understand the benefits of supplementing their regular diet to ensure that the nutritional requirements are met.

## **The rise of India's nutraceutical market**

The Indian nutraceutical market was valued at 2.8 billion USD in 2015 and is expected to reach 8.5 billion USD by 2022. However, research now shows that the growth may far exceed the projected figures. One of the main reasons for the spurt in nutraceutical sales is our economic upswing. The Indian economy now ranks as one of the fastest growing economies in the world with an average annual growth rate of 5 per cent. The increase in purchasing power has enabled a larger number of consumers to buy non-essential products in order to improve their quality of life.

Another important reason for the growing interest in nutraceuticals is the increase in the influence and reach of social media. Social media platforms such as Facebook, Twitter, Instagram, and Snapchat have influenced and increased the sharing of knowledge. Social media is also an easy way to stay up-to-date on the latest news in health care. It has also helped create awareness on the impact of lifestyle choices on health. Our sedentary lifestyle, coupled with an increased reliance on fast foods and packaged food, has led to a sharp increase in lifestyle diseases including diabetes, obesity, and heart disease. The increased awareness of these health risks has resulted in consumers switching to a healthier lifestyle and supplementing their diets with nutraceuticals instead of pharmaceutical drugs in order to improve their overall health.

## **Demand for nutraceutical products**

While the younger generations have played a significant role in the growth of the nutraceutical market, in recent years the senior citizens' consumer bracket has also developed. This growth can be traced to the increase in the average lifespan, coupled with a growing desire to enjoy one's post-retirement years. Indians are also well-informed about the



possible side effects of pharmaceutical drugs and so more and more of them are increasingly turning towards natural solutions – not just to increase their lifespan but also to increase the quality of their life too. Several of these nutraceuticals offer therapeutic benefits and can be used to prevent common ailments associated with old age. There is also a practical and financial driver behind the growing interest in preventive healthcare. Spiraling medical costs and increased incidence of lifestyle diseases has forced our cost-sensitive market to confront the reality that spending on nutraceuticals now is an investment in future health. By investing in preventive care, you can save a lot more on future medical expenses, and so nutraceuticals have become a sensible and practical choice.

Most nutraceuticals are bio-available herbal formulations containing natural ingredients and extracts that work together for a common purpose. For instance, a digestive supplement would contain a variety of ingredients such as apple cider vinegar, ginger root, probiotics, etc, that support digestive health. Similarly, supplements that help to lower blood pressure might contain the bark of the Arjuna tree along with grapeseed extract, and they also contain therapeutic compounds that exert lipid lowering and anti-inflammatory effects. Combining several natural compounds and extracts can greatly increase the therapeutic benefits of the supplement. For instance, studies have shown that adding piperine – a component found in black pepper – to curcumin extract obtained from turmeric could increase the bioavailability of curcumin by more than 100 per cent! Nutraceuticals are especially effective in preventing and managing diabetes, heart disease, anemia, arthritis, liver disease along with respiratory and digestive disorders. These supplements can also be used to detoxify and cleanse your body, boost your immune system and support healthy organ function. Nutraceuticals can also be used to improve hair or skin health and these supplements are often

## → “PURE NUTRITION AIMS TO OPEN 100 STORES ACROSS THE COUNTRY NEXT YEAR”

The Mumbai-based nutraceutical company, which manufactures and markets 100% herbal nutritional supplements, cold press oils, protein powders and herbal teas, is developing and expanding its range of organic health products and will soon introduce protein bars, granola mixes, and nut butters to corner a greater share of India's fast growing health and wellness market.



### Tell us about your company and its products.

Pure Nutrition is the result of a shared vision between Luke Coutinho, a celebrated nutritionist and myself. We are a Mumbai-based nutraceutical company that takes inspiration from ancient Indian medicine, but uses rigorous modern scientific methods of testing and trial to create a variety of natural foods, supplements and herbal infusions of the highest quality. We focus on increasing the bioavailability of our products to ensure better absorption. Pure nutrition formulates, processes and markets 100% herbal nutritional supplements, cold press oils, protein powders, and herbal teas. We continually develop and expand our range of organic health products in order to prevent, reduce and manage diseases and enhance overall health and wellbeing.

### How do you see the nutraceutical category evolving and growing over the years?

The Indian nutraceutical industry has been growing at a CAGR of 17% and we anticipate even greater growth prospects in the near future. With our vast markets opening up, the latest reports predict a doubling

of India's nutraceutical industry by 2020, to reach USD 6.1 billion. I believe that we will see a significant growth spurt in 2018 once the FSSAI's planned introduction of new regulations for nutraceuticals takes effect. The new regulations will establish well-defined standards and regulations, allowing nutraceutical manufacturers to manufacture, distribute, sell and import products within a clear framework. This transparency will greatly increase the consumer's trust in nutraceutical products and help the market grow and evolve.

### What is the branding and advertising/promotional strategy for your nutraceutical products?

Both Luke Coutinho and I firmly believe that quality products in health require minimum spends on marketing and advertising because of the growing need for reliable nutraceutical products. Consumer trends show a preference for ingredient quality over retail price, which has elevated our place in the market. We focus on reaching out to customers digitally as well as offline to create awareness about the health benefits of our products as well as our commitment to product quality. We plan to get more aggressive on our outreach efforts in the near future.

### What is the sales/ turnover/ growth rate of your products and your future plans for expansion.

Pure Nutrition had an annual turnover was INR 2.5 crore in the previous year, but we have already surpassed that amount this year





# Enlightened Eating

Grocers give shoppers food for thought with lessons in organic and local produce.

By Jennifer Straily

**“L**ocal” and “organic” remain powerful selling points that drive double-digit sales in the produce department.

In the past five years, dollar sales of organic fruit have increased by 123 percent, while organic vegetables have grown by 92 percent, according to the Organic Trade Association (OTA).

“Organic fruits and vegetables remain the biggest of all organic categories, with sales of \$14.4 billion in 2015 [including frozen and canned], up almost 11 percent,” says Maggie McNeil, director of media relations for Washington, D.C.-based OTA, with fresh produce alone accounting for \$13 billion. “Almost 13 percent of the produce sold in this country is now organic. We don’t see this trend slowing down.”

While opportunities for continued growth abound, at the same time, consumer research shows that some shoppers are confused about the benefits of natural and organic products. What’s more, they’re hungry for knowledge about how and where their food is grown.

“Consumers are looking to farmers’ markets and local, specialized retailers as destinations for learning about natural and organic products, and as a way to connect with local producers,” notes Bellevue, Wash.-based The Hartman Group in its “Organic & Natural” 2016 report. “Those are two areas that food retailers might consider focusing on as a way to make themselves more unique when it comes to organic and natural products.”

Two rapidly expanding grocery chains in the United States are doing just that — delivering as destinations for organic and local produce while at the same time offering in-store and online nutrition

education that helps shoppers eat and live more healthfully.

The fast-growing Lakewood, Colo.-based Natural Grocers by Vitamin Cottage, which operates more than 135 stores in 19 states, employs a health coach at every store. In addition to providing ongoing nutrition classes on topics ranging from eating more organic fruits and vegetables to healthy proteins to alternatives to sugary beverages, the coaches lead a variety of classes at local schools and businesses in their communities.

On a mission to establish itself as “America’s Health Education Expert,” Natural Grocers recently redesigned its Good4u Health Hotline monthly circular. Available in print and online versions, the magazine is distributed to consumers via direct mail and in-store. Circulation is expected to exceed 750,000 by year’s end.

This health-expert-meets-retailer model is resonating with consumers. According to Natural Grocers, its net sales increased 12.9 percent to \$705.5 million in fiscal 2016, and sales were up again, by 9.4 percent, for the first quarter of fiscal 2017, compared with the same period in 2016. Anticipating continued growth, Natural Grocers has signed an additional 16 leases on stores set to open in 2017 and beyond.

With more than 1,600 stores in 35 American states, German hard-discount grocer Aldi, with U.S. headquarters in suburban Chicago, is thinking organic and fresh as it expands its reach.

“We have increased our fresh produce offerings across all of our stores over the years, and currently carry a wide variety of fresh fruits and vegetables, including organic bananas, tomatoes, avocados, apples and salad mixes,” notes Aldi spokeswoman

**“People are taking charge of their health, and taking charge of their diet is an important part of that.”**

— Karen Falbo  
Natural Grocers





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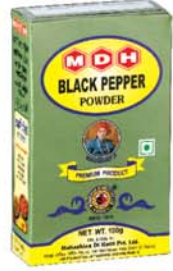
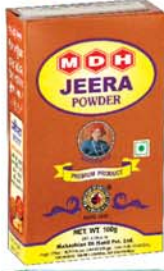
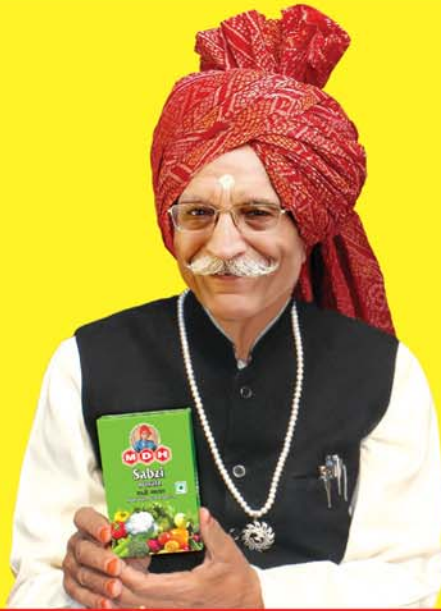
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