

Impact of GST on E-commerce

How GST implementation is boosting the growth of start-ups and making it easier to start one's own ventures

Page 10

Growing Market for Honey

Definite spurt in domestic demand on the back of an increase in per capita income and rise in health consciousness

Page 12

Category Watch: Breakfast Foods

Demand for greater choice, convenience and health holds out significant opportunities for brands and companies

Page 30

PROGRESSIVE GROCCER

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Page 20

**"CONSUMERS
ARE LOOKING
AT SOLUTIONS
FROM RETAILERS"**



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MD & CEO, SPAR HYPERMARKETS



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The fresh fruits and vegetables (F&V) sector has been a slow mover in the organised retailing space in India. However, in the past few years, F&V selling in modern retail has been picking up pace. Valued at over Rs 2. lakh crore and consumption growing at a CAGR of 10 per cent in value terms over the last decade, organised retailers see a lot of potential in F&V retail business. This is prompting them to revisit their business and distribution models to increase their market share. As organised players revisit their business model at every step of the value chain from farm to fork, in order to restructure it, F&V retail is set to transform in India and become a significant part of the business of F&G retail.

With improvements in infrastructure, roads, transport, warehouses, cold chains and overall connectivity, retailers have more room to reinvent their distribution and marketing strategies, and also for testing newer retail formats and practices that may lead to fresh growth channels. The sector's back-end is also being strengthened by modern wholesalers, who are now increasingly open to collaborating with the retailers. These developments are helping to establish potent links between farmers and retailers and in providing the much-needed infrastructure to purchase and market fresh produce in the country. All of these are very timely and welcome steps in the right direction that will eventually transform fruit & vegetable retail in India and help to sharply reduce our staggering wastage and spoilage of fresh produce.


Amitabh Taneja
 Editor-in-Chief

All feedback welcome at editorpgindia@imagesgroup.in

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COVER STORY

20 SPAR India: A hypermarket known for value and differentiation

The Dutch brand SPAR is the world's largest voluntary retail chain with over 12,000 stores in 40 countries worldwide and meets the needs of over 13 million consumers every day. In India, SPAR Hypermarkets operates 20 stores across nine states. Progressive Grocer takes a look at how the retailer remains receptive to introducing new products across categories and the various innovations it has put in place to keep abreast of the fast-changing consumer buying trends.



10 VIEWPOINT

The Impact of GST on E-commerce Market

28 FMCG

Building new-age brands in the social-digital age

30 CATEGORY WATCH: BREAKFAST FOOD

Breakfast Bonanza



HONEY



- 12** Business opportunities to hit the sweet spot
- 14** Taking the lead in honey market
- 16** Easiest way to have honey - Honey Twigs!
- 18** The use of honey in the millennial generation is rising

50 ALL'S WELLNESS

Wellness from the Deep



IN EVERY ISSUE

08 MARKET UPDATE

Vezlay's soya products strike a chord with customers

52 WHAT'S NEXT

Food, Beverage & Non-food Products



The Impact of GST on E-commerce Market

With GST, inter-state movement of goods has become easier. E-commerce enterprises can deliver their products on time without any delay, which will inspire more consumers to buy products online.

By Deepak Agarwal



GST has made things easier by removing all the hurdles in the maintenance of warehouses. As a result, an increasing number of operators have started showing interest in setting up their warehouses in remote areas of the country.

Goods and Services tax (GST) is an indirect tax levied on the sale of goods and services and it has replaced almost all indirect taxes in India. After the liberalisation of the Indian economy in 1991, GST is considered one of the biggest economic reforms in the country's indirect tax structure. GST is having an impact on every sector and e-commerce is no different. The e-commerce industry is growing at a rapid pace, with the emerging space including giant players, small enterprises and individual sellers who sell their products through these portals. However, it involves two types of players predominantly – the marketplace and sellers. GST's impact is on both types of players.

How GST is benefiting the e-commerce sector
Doing business is easier: Starting your own venture has become much easier with the introduction of GST. Entrepreneurs don't have to go through the hassle of getting VAT registration and clearance on entry taxes. The biggest hurdle was the different taxation system in each state; with GST, this problem has been solved. These changes have made it much easier for entrepreneurs to start their own ventures, giving the much-needed boost for the growth of start-ups in the country.

Interstate movement of goods is free: With GST, inter-state movement of goods has become easier. E-commerce enterprises can deliver their products on time without any delay, which will inspire more

consumers to buy products online. Earlier, it was mandatory for e-commerce platforms to file VAT declaration and provide the registration number of their delivery vehicle. Insufficient paperwork would lead to tax authorities seizing shipments. With GST, all these complications have come to an end.

Gates are open for everyone: Earlier, it was important for sellers on e-commerce platforms to submit multiple documents such as VAT, CST and TIN. But with this new tax reform sellers with revenues of up to Rs. 2 million do not require any of these. Removal of CST and VAT for the small sellers has made their lives easier. GST has not only made operations easier for the small e-commerce businesses but has also reduced the delivery cost. Now there are no complications at check posts on state borders, thereby reducing the overall cost of delivery.

Logistics efficiency has improved: Prior to the introduction of GST, a lot of money and time had to be spent on the maintenance of warehouses across the country to avoid CST. For logistics and warehousing departments of e-commerce companies, GST has come as a drop of rain in the desert. Earlier, large sums were allocated for warehouses to escape the complications of entry-level tax for each state, which would ultimately increase the overall cost.

GST has made things easier by removing all the hurdles in the maintenance of warehouses. As a result, an increasing number of operators have started showing interest in setting up their warehouses in remote areas of the country.

How it has adversely impacted the business
Overall costs have gone up: The rise in raw material costs, owing to GST, has increased the overall



Taking the lead in honey market

With the changing food consumption paradigms, the generation today prefers everything healthy in their diet. With this shift, one of the most sought after breakfast essential—honey has taken over as a staple on the breakfast table. To know more about this emerging food trend and his take on how the category is maturing in India, Progressive Grocer spoke to Vimal Anand, Managing Director, APIS India.

By Rachita Sehgal



Vimal Anand
MD, APIS India

Established in 1924, APIS today is managed by the families third generation. The company started off as a honey brand and over the years has forayed into other healthy products like Jams and Dates. Vimal adds, “With a mission to make pure and natural products a part of consumers everyday life the company has also forayed into tea; cookies, pickles, jam, dates and Preserves considering the changing purchase dynamics & growing need of the quality branded packaged products.”

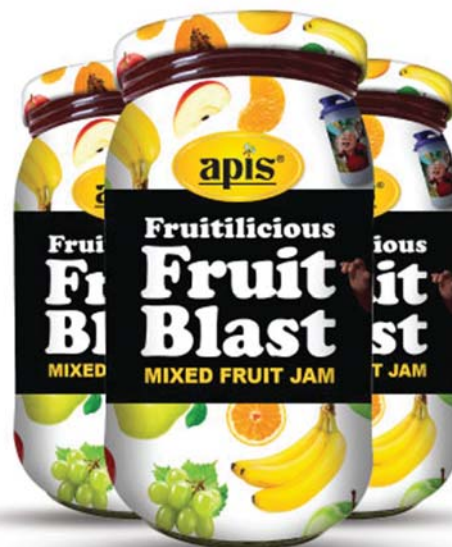
How has honey gathered popularity as a breakfast essential?

Breakfast is the most important meal of the day.

Whether it's a quick slice of toast spread thickly with honey, homemade muesli or even a stack of pancakes honey has become a crucial part of our everyday breakfast spread. With variants of honey APIS is one of the leading honey brand in the country. Keeping in view the shift in customer preferences APIS has introduced various variants to their honey offerings, “APIS India also provides specialized honey, which comprises ginger, lemon, organic, honey with nuts, and honey with comb and is the winner of numerous international; industry and government honey exports. APIS India products have been benchmarked to meet all European Union and other International Standards,” shares Vimal.

What is your target audience?

I would not like to restrict my brand to a specific target audience, we target



AN INDUSTRY LEADER

APIS India is one of the few companies which has been certified with ISO- 22000 for documented procedure that applies to Food Safety framed by International body for Honey. Incorporated in the year 1982, the venture is headed by Vimal Anand, Managing Director and Amit Anand, Joint Managing Director. APIS India is one of the leaders in the field of organized Honey trade in India. With its world class in-house facilities for testing lab; processing and filtration for honey. It has a state-of-the-art manufacturing facility spread in over 7 acre in Rorkee with a capacity to process over 100 tonnes of honey per day. With a mission to make pure and natural products a part of consumers everyday life the company has also forayed into Jam, Pickles, Green Tea & Preserves considering the changing purchase dynamics & growing need of the quality branded packaged products.

a large segment of customers from a housemaker, to working professionals to kids to higher the ladder generation. We don't want to restrict ourselves from serving all, we have a PAN India presence and our foothold in states like Andhra Pradesh, Telangana, Tamil nadu, Karnatka, Maharashtra is very strong, South India is our focus market. Adding on Vimal says, “Though we are not focused on tier 3 cities, but we are present in the urban population of tier 3 cities as well. Our rural reach is through indirect channels like wholesalers but as of now we haven't established a team to focus on the tier 3 cities. The kind of product range that we deal in is initially directed towards the urban audience more.” **PG**



“Approximately 60% of the shelf space is allocated to food categories and 40% to non food categories. As regards to the sales mix, over 65% is from food and the balance from non-food categories.”



Rajeev Krishnan
MD and CEO,
SPAR Hypermarkets

SPAR India: *A hypermarket known for value and differentiation*

The Dutch brand SPAR is the world's largest voluntary retail chain with over 12,000 stores in 40 countries worldwide and meets the needs of over 13 million consumers every day. In India, SPAR Hypermarkets operates 20 stores across nine states. Progressive Grocer takes a look at how the retailer remains receptive to introducing new products across categories and the various innovations it has put in place to keep abreast of the fast-changing consumer buying trends.

SPAR India is part of the Landmark Group, a multinational conglomerate involved in retailing of apparel, footwear, consumer electronics, cosmetics & beauty products, home improvement and baby products. The Dutch brand SPAR is the world's largest voluntary retail chain with over 12,000 stores in 40 countries worldwide and meets the needs of over 13 million consumers every day. In India, SPAR Hypermarkets came about as a license agreement between the Dubai-based Landmark Group's Max Hypermarkets India Pvt. Ltd. and SPAR International.

SPAR is the world's largest independent food retail chain, which operates on the principle of a 'Co-operative of Independent Retailers and Wholesalers.'

In India, SPAR Hypermarkets operates over one million square feet area across 20 stores in nine cities, including Bengaluru, Mangalore, Coimbatore, Hyderabad, Delhi, Ghaziabad, Gurgaon, Chennai and Pune. The average store size is 40,000 sq.ft. and, between its 20 stores, SPAR serves 30 million customers annually. The retail chain crossed revenues of Rs. 1,000 crore last year and has been clocking double digit growth of late.



“Approximately 60% of the shelf space is allocated to food categories and 40% to non food categories. As regards to the sales mix, over 65% is from food and the balance from non-food categories,” informs Rajeev Krishnan, Managing Director and CEO, SPAR Hypermarkets.

Customer profile at SPAR

SPAR Hypermarkets' customers are family consumption groups with both value as well as aspirational needs. They range from the affluent segments to the pure value-seeking segments. The majority of customers belong to the 25+ age group. There is a healthy mix of demographics and age groups that visit the stores.

Merchandise and products

Food and grocery, fresh categories, FMCG, home furnishings and home ware, general merchandise and apparel are key categories around which SPAR has built its stores over the years. The brands it stocks and sells are leaders in all the categories. Besides, brands in SPAR stores also include numerous SMEs and MMEs who have brought great products to life.

The hypermarket offers a wholesome assortment covering fresh produce, fish & meat, staples, consumer packaged goods, home and living products, and more. Of late, SPAR Hypermarkets has begun offering even a wider range of products by adding new categories such as home furnishing, wooden handicrafts, kids' toys, health and wellness products, among other newer categories.

Hypermarket with a distinct positioning

SPAR's mission has always been to be a hypermarket that is known for value and differentiation. “Food, grocery and consumables have a higher share and drive our frequency while general merchandise, home and apparel play a different role. We are regularly reviewing all our categories to look for new and fun areas to expand into, innovative ideas to recreate what we already have and, of course, maintain high standards in what does well,” says Solai Shakthivel, Sr. Vice President - Foods Business at SPAR India. Health & Wellness, Convenience Lifestyle, Food Theatre, My Home, Millennial and Fresh are all the areas that the retailer is looking into to bring differentiation within.

New products and emerging trends

Food concepts, health & wellness range, organic, OTC, beauty, skin care are the new and emerging categories. “The aspiration levels of customers are going through an upward evolution. More and more customers are becoming aware of themselves, of what they consume and impact of the products they buy on their health and the world. And this is changing the way they look at their lives and what they consume,” opines Krishnan.

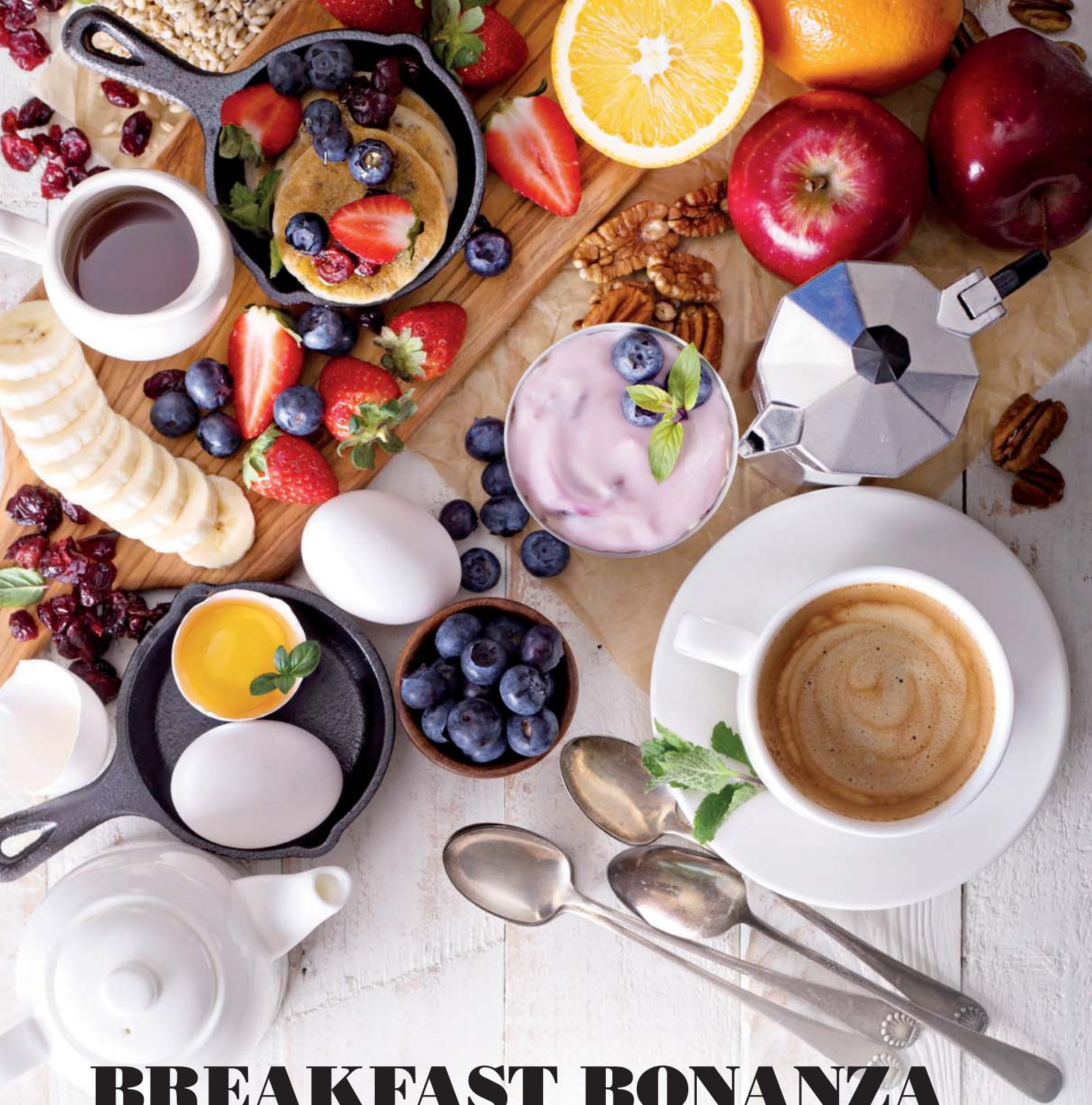
In keeping with the fast changing consumer buying trends, the retailer remains receptive to introducing new products across categories. “Today's extremely busy consumers are not only looking at shopping regular basket items but are also looking at solutions from retailers. We see 'convenience' shopping as a big opportunity. Health & Wellness is



“We are regularly reviewing all our categories to look for new and fun areas to expand into, innovative ideas to recreate what we already have and, of course, maintain high standards in what does well.”

— Solai Shakthivel
Sr. Vice President - Foods Business at SPAR India





With consumers demanding greater choice, convenience and health benefits in their morning eating occasion, India's growing breakfast foods market is spurring innovation in many forms – new formulations, flavours and formats.

The need for greater convenience, changing social mores and an increasingly mobile workforce is changing the definition of breakfast. Increasingly, consumers are blurring snacktime and mealtime, they desire foods that are portable, nutritious and simple to prepare or eat. Some consumers are eating breakfast foods as a snack, while others eat a snack instead of a meal for breakfast. This has influenced categories, especially cereal, to cater to these behaviors. So, apart from the traditional, tried and tested breakfast foods, operators are evolving breakfast menus, incorporating more veggies, ethnic ingredients, healthy items and savory flavors that are characteristic of other dayparts. And that's right on target with what consumers want

today, an increasing number of whom are well-travelled, have sufficient exposure and nurture higher culinary expectations.

So, while traditional Indian breakfast comfort foods continue to hold sway, there is also a burgeoning demand for a more adventurous and contemporary breakfast menu. “Traditional breakfast options continue to be a part of the Indian breakfast table and there is a big segment of people who still prefer home-cooked food for breakfast. However, in light of the growing importance of health and wellness in our lives, consumers are now making an effort to ‘healthify’ traditional meal items by using healthier ingredients,” says **Mohit Anand, Managing Director at Kellogg India and South Asia**. The sentiment is echoed by **Devna Khanna, Director, i2i Consulting and India Trade Representative for the California Walnut Commission**. She says: “Usage of nuts, quinoa, dried fruits and seeds like chia, flax, pumpkin and sunflower is on the rise. Nuts, cereals, eggs, fruits and juices are recording maximum growth.”

But for the most part, Indians are inclined to consuming their quintessential hot, cooked breakfast. “This is because a huge percentage of Indian consumers still prefer freshly prepared hot breakfast. If we talk about the population living in other than Tier I and Tier II cities, people prefer home-cooked fresh breakfast rather than having easy, ready-to-cook or cold breakfast,” says Khanna. Parantha remains a popular breakfast item in north, idli and dosa in south, flattened rice flakes (chivda/poha) with milk in western and central India, whole wheat grits (dalia), and a mélange of regional staples in many other parts of India.

Bread and eggs continue to be a popular breakfast staple in many households. But the choices have grown even in this segment. The range of breads available today include white bread, brown bread, whole wheat bread, multi-grain bread, sandwich



bread, multigrain oats and flax, baguette, and croissant. For egg lovers too, there has been an explosion in the choice at the retail level – there are brown eggs, white eggs, quail eggs and free-range eggs (cage free) to choose from. Leading egg producers like Venky's and Suguna are making innovations related to packaging, nutritional content (the addition of omega-3s), egg color, and production method (cage-free, organic and free-range). As a result of such initiatives, the market share for organic and cage-free eggs, while small, continues to rise as

egg companies increase their focus on cage-free egg production.

Apart from bread and eggs, supermarkets across the country are reporting growth in sales across many breakfast categories. Given the rushed urban lifestyles of today, consumers are looking for convenience without compromising on health and taste. The need for convenience and health is also the reason why packaged and ready-to-eat breakfast cereals – both hot and cold – have risen as an important category in the food and beverage industry. While the rise of oats and muesli as a category is a global trend, multinationals and large domestic food companies are all now fighting for a pie of the fast-growing breakfast category, which includes oats, corn flakes, muesli, dalia and mixes of traditional breakfast like idli and upma.

Popular Breakfast Foods

At Foodworld, a chain of supermarket stores, the breakfast cereal range has been performing well with offerings that include muesli, all bran wheat, corn flakes, ragi flakes, almond corn flakes, strawberry corn flakes, granola, Special K (for women), and millet muesli. In the oats category where Quaker, Kellogg's, Saffola and Bagrry's are its top performing brands, the chain has been recording good sales for classic oats, masala oats and oats shake. In the millets category, brands such as Manna, 24 Mantra, Organic Tattva, and Arya are the sales pullers at Foodworld, which rakes in about three per cent of its overall sales from the breakfast category.

“Alongside the good sales of breakfast cereals, we also see an impressive show put up by Indian breakfast mixes comprising products like upma mix, rava idli mix, rava dosa mix, vada mix, oats upma mix, ragi dosa mix, vermicelli mix, poha mix, multigrain dosa mix and oats idli,” informs **Eby Mathews, Chief Operating Officer, Foodworld Supermarkets Pvt. Ltd.** MTR, 24 Mantra, Maiyas, and Pillsbury are its top brands in the Indian breakfast mix segment. In the kid's breakfast segment, honey loops, choco's, pan cakes, oat-bites and choco-fills are the popular offerings with Kellogg's, Soulfull, Pillsbury and



“In light of the growing importance of health and wellness in our lives, consumers are now making an effort to ‘healthify’ traditional meal items by using healthier ingredients.”

— **Mohit Anand**
MD, Kellogg India and South Asia



“We see an impressive show put up by Indian breakfast mixes such as upma mix, rava idli mix, rava dosa mix, vada mix, oats upma mix, ragi dosa mix, vermicelli mix, poha mix, and oats idli.”

— **Eby Mathews**
Chief Operating Officer, Foodworld Supermarkets



what's next

Food, Beverage & Non-food Products

▼ Cornitos launches premium salted long peanuts

Cornitos, the flagship brand of Greendot Health Foods has launched premium salted long peanuts to its growing portfolio of Pop 'n' Crunch range. The brand is also planning to launch peanuts in other exotic flavors as well. Cornitos Premium Peanuts Salted is long variety, handpicked and processed through a unique roasting technology for a uniform roast and a crunchy bite. These are available in an easy-to-open and re-sealable stand up pouches of 150 gm packs. These easy-to-handle pouches lock in freshness and deliver great taste. Its functional design and attractive packaging gives consumers the advantage of multiple time product use instead of one-time snacking. One ounce of Premium Peanuts delivers around 159 Kcal energy and is beneficial for modern day energetic lifestyle; it can be easily used for travel, office munching and even post-workout snacking. Peanuts are source of protein, fiber and is zero cholesterol.



▼ M.O.M brings instant ready to cook veg biryani

M.O.M - Meal of the Moment - brings you mouth-watering, instant and wholesome food that'll transport you back home. All you need to do is add hot water and a loving, homely meal is ready in minutes! No stove required! One of their more unique offerings is Veg Biryani - just like all their products, it is free from preservatives and artificial flavours - this clearly comes across in the freshness and flavour profile. They use the best quality ingredients and spices and once you eat it, it tastes just like *ghar ka khana*. M.O.M always wants

her children to save as much money as possible - her biryani in individual pouch format is priced at Rs. 30/- for home use and cuppa format for Rs. 60/- for added convenience. The company owns and operates one of India's largest and most advanced instant food processing facility with zero human intervention - from the time fresh raw material is brought in from farms across the country to the final packaging.



▲ eighty20 launches natural variant of The morning bar- The blueberry bar

eighty20, the whole food brand, is coming up with its latest all natural variant of The morning bar - The blueberry bar. This is the first blueberry bar in the country, which is also gluten free and vegan. These bars are minimally processed and a great start for those energy rich mornings. As per the founder Kajal Bhatia, a whole food nutritionist, "Blueberries are a rich source of antioxidants, especially anthocyanins. Along with the gluten-free oats and superfoods like pumpkin seeds and almonds, they can be an energising kick-starter for the morning routine, free of refined sugars and additives. The brand has a wide range of clean, honest, nutritious and healthy whole food, and also tasty food products made with 100% natural ingredients, which are minimally processed. Currently, they have three variants in the market - The Morning Bar, The Evening Bar and The Workout Bar. All eighty20 bars are free from high fructose corn syrup or refined sugar.

▼ Truevalue Marketing launches retail brand 'Granules N Beans'

Truevalue Marketing Services Pvt. Ltd., one of the leaders in the premixed beverages and manufacturer of India's finest chai and coffee premixes, has recently launched a retail brand called 'Granules N Beans' Instant Tea Premix. The product caters to local as well as international consumers who wish to have authentic Indian home-made tasting tea (*ghar jaisi chai*) every time, no matter where they are. With this insight, GNB has crafted a range of instant tea premix that tastes exactly like home chai and can be made instantly in less than a minute. They are available in four variants - lemon grass ginger, ginger, masala and cardamom. The brand uses 100% pure Assam teas that are well-known for strong taste and flavour, vigorous body and bright colour. The GNB chai gives a natural milk taste due to its superior quality of milk procured, contrary to the other teas available in the market.



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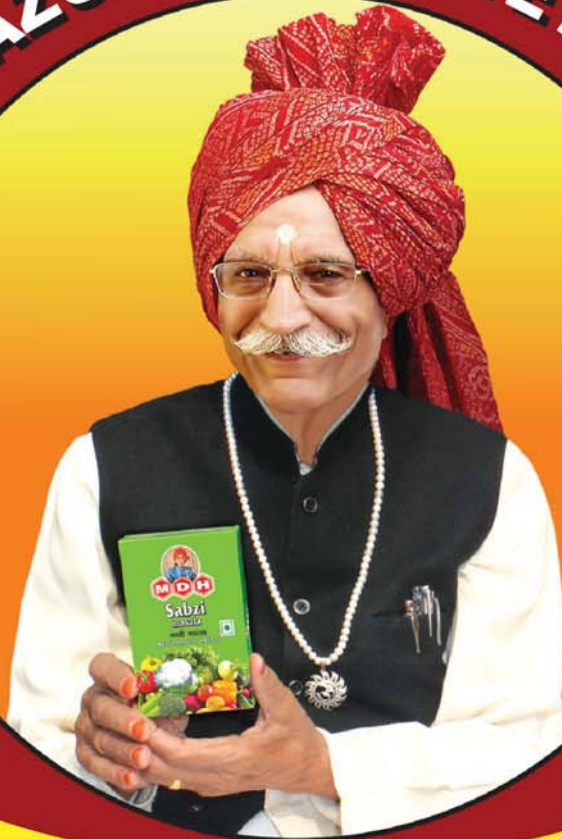
Our rich spices are sourced from the best regions and have been the key ingredient of success for iconic brands worldwide. As India's largest supplier, the spices meet with stringent quality tests in state-of-the-art facilities before being packed using a special material. This ensures complete freshness and retains the natural colours, so that you enjoy the rich taste of perfection in every bite

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