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WE ARE A SPECIALTY STORE FOR THE COSMOPOLITAN CROWD



SUNIL SANKLECHA
MANAGING PARTNER, NUTS 'N' SPICES

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Months of frenzied market speculation finally came to an end with the world's largest retailer Walmart Inc. acquiring a 77% stake in India's biggest online retailer Flipkart for \$16 billion. "India is one of the most attractive retail markets in the world, given its size and growth rate, and our investment is an opportunity to partner with the company that is leading the transformation of e-commerce in the market. As a company, we are transforming globally to meet and exceed the needs of customers and we look forward to working with Flipkart to grow in this critical market," said Doug McMillon, Walmart CEO, after the deal was inked and sealed.

Walmart and Amazon had both bid for a controlling stake in India's leading e-commerce company, at a valuation of about \$20.8 billion. If Amazon had succeeded, it would have given the company control over an estimated 80% of the country's nascent online market, which is expected to grow rapidly over the next several years. While e-commerce in India accounts for just 2% of total retail sales today, it's expected to grow to 12% by 2026. Morgan Stanley sees India's e-commerce market growing to \$200 billion in around a decade.

It therefore makes sense for Walmart to beef up its online capabilities as it does for other top retailers as well, what with the lines between online and offline getting increasingly blurred.

Going forward, it will be interesting to see how this historic deal will impact and shape the contours of India's fast growing retail sector. Expect more of consolidation, mergers and acquisitions and offline-online partnerships in the sector in the days ahead.


Amitabh Taneja
 Editor-in-Chief

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Specialty Store in Chennai gains a nation-wide following

Founded in 1999, Chennai-based Nuts 'n' Spices is a Specialty store that sells a large variety of products such as dry fruits, spices, herbs, health products, sugar-free products, imported chocolates and biscuits, imported dairy products, imported ice creams, frozen foods and many more gourmet products. The 33 Nuts 'n' Spices stores have an average store area of 1,200 sq. ft. with total retail area spanning 40,000 sq. ft. In the last fiscal, the chain grossed a turnover of Rs. 82 crore, which is impressive taking into account its Rs. 57 lakh revenue in the first year of operation.



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Sips and drinks to chill and relax

With more and more Indians open to the idea of trying out newer and different flavors, it is a good time for beverage companies to launch new products and variants. Packaged beverages are gaining traction with Indian consumers who are now frequently reaching for products that reflect the core consumer trends dominating the market: taste, functionality, added vitamins, proteins and minerals, as well as unique blends that consumers might not experiment with on their own.



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Organic packaged food market to cross INR 871 million by 2021

A study by industry body ASSOCHAM and global consulting firm EY says that the market size for Indian organic packaged food is expected to cross INR 871 million by 2021 from INR 533 million in 2016.

Organic packaged food and beverages is an emerging niche market in India and its primary consumers are high-income urbanites. As demand for organic food in the metro cities increase, the companies in this sector are witnessing notable growth with the entry of several new players in the organic food market, said the ASSOCHAM-EY joint report titled, 'The Indian Organic Market: A new paradigm in agriculture'.

100%
natural



India-based Sresta Natural Bioproducts. has emerged as the market leader, with 37 per cent value share of the packaged organic food market and 7.8 per cent share of the packaged organic beverage market. It has increased its share in the organic food market in recent years, while smaller niche players have taken significant share away from it in the organic beverage market, adds the study.

"In addition to the growing domestic market, India is the second largest exporter of organic products in Asia after China. The increasing export market coupled with the Government's support has made organic cultivation in India highly successful," said Amit Vatsyayan, Partner, EY. Indian organic food exports were estimated at US\$299 million during 2015-16 with total volume of 263,688 MT.

The major export destinations were the US, European Union, Canada and New Zealand. It is assumed that most of the remaining quantity is sold in local markets. Oilseeds comprised half of India's overall organic food export, followed by processed food products at 25 per cent.

According to ASSOCHAM-EY study, India currently holds the ninth position among 178 countries that actively practice organic agriculture.

At present, the country is home to more than 835,000 organic producers, 699 processors, 669 exporters and 1.49 million ha area under organic cultivation. However, with only a meagre 0.4 per cent of the total agricultural land area designated for organic cultivation, the industry presents extensive scope for expansion.

Pinakiranjan Mishra, Partner and National Leader, Consumer Products and Retail, EY, says, "With Indian consumers' increased inclination and awareness towards health and nutrition, the outlook for organic products in India has been very positive. Consumers are today accepting organic food and beverages as part of their daily diet, thereby, creating significant growth

opportunities for existing as well as new industry players in this segment.

With the participation of numerous Indian and multinational companies and their expansion in the market, India is rapidly becoming a production hub for organic foods.”

India has a remarkable potential to produce all varieties of organic products, owing to the existence of various agroclimatic zones within its borders. The total area under organic certification was 5.71 million ha in 2015-16. This included 26 per cent cultivable area with 1.49 million ha and 74 per cent (4.22 million ha) forest and wild area for collection of minor forest produce.

Among the states, Madhya Pradesh has the largest area under organic certification (4.62 lakh ha) followed by, Maharashtra (1.98 lakh ha) Rajasthan (1.55 lakh ha), Telangana (1.04 lakh ha), Odisha (0.96 lakh ha), Karnataka (0.94 lakh ha), Gujarat (0.77 lakh ha) and Sikkim (0.76 lakh ha). These states had a combined share of 90 per cent of the area under organic certification in 2015-16, highlighted the study.

In terms of organic crops, the combined share of the top 10 categories of organic food crops is around 99 per cent. The top four categories (with a share of around 85 per cent) include sugar, oil seed, fiber and cereals and millets.

“According to our findings, metropolitan cities have witnessed a 95 per cent increase in demand in the last five years,” said Vatsyayan. “Many organic food companies are adopting the online route to expand their consumer base. The brick and mortar organic stores are usually located in metro and mini metro cities. These companies are reaching out to the rest of the consumers through online channels,” says Mishra.

With increasing incidence of health problems such as diabetes, anxiety and stress plaguing urban India, many entrepreneurs are venturing into the area of organic café and marketplace.

Benefits of organic products

The consumers are increasingly becoming aware of the food safety issues and environmental issues because of their increased concern about health, the

environment’s health and its global implications. Organic food now has become a viable alternative for an increasing number of consumers, who are worried about the presence of chemicals residue and the negative consequences on the environment caused by intensive production methods.

Many farmers also now see organic farming as a way to stabilize or even increase their income due to public policy support and growing market demand. The benefits of organic products are threefold as summarized below:

Health: Organic agriculture regulates how food is grown and processed. In addition to meeting the health and safety requirements of conventional food, organic food must also meet the additional safety standards of organic farming such as tougher regulations on manure use. Studies have shown that organic food contains a lower concentration of pesticides as compared to conventionally grown food. Hence, there is a good reason to believe that organic farming reduces health risk. The health benefits of organic products are as follows:

Toxin and GMO-free: Organic products are the most heavily regulated food products in the US. Only organic products come with a guarantee that no toxic persistent pesticides, synthetic fertilizers or GMOs are used in their production. Additionally, no antibiotics or growth hormones are given to livestock. Organic producers and processors are subject to rigorous announced and unannounced certification inspections by third-party inspectors to ensure that proper due diligence procedures and protocols are being followed.

Higher nutritional content: Recent studies have found that organic fruits, vegetables and grains have fewer nitrates and cadmium and fewer pesticide residues than non-organic crops, making them safer to consume.

Environment: Organic farming primarily focuses on eco friendly agriculture practices. It might not eliminate the negative environmental impacts wholly, but it can help reduce water pollution and improve the soil quality. Organic cultivation promotes conservation of biodiversity, enhances ecological functions and ecosystem services.

India has a remarkable potential to produce all varieties of organic products, owing to the existence of various agroclimatic zones within its borders. The total area under organic certification was 5.71 million ha in 2015-16.





Specialty Store in Chennai gains a nationwide following

Founded in 1999, Chennai-based Nuts 'n' Spices is a Specialty store that sells a large variety of products such as dry fruits, spices, herbs, health products, sugar-free products, imported chocolates and biscuits, imported dairy products, imported ice creams, frozen foods and many more gourmet products. The 33 Nuts 'n' Spices stores have an average store area of 1,200 sq. ft. with total retail area spanning 40,000 sq. ft. In the last fiscal, the chain grossed a turnover of Rs. 82 crore, which is impressive taking into account its Rs. 57 lakh revenue in the first year of operation.

Progressive Grocer traces the incredibly successful journey of Nuts 'n' Spices since its inception as a small Specialty store to attaining its current cult status as a destination food store for the health-conscious cosmopolitan crowd.

By Sanjay Kumar



SUNIL SANKLECHA

Managing Partner, Nuts 'n' Spices

Nuts 'n' Spices was founded in June 1999 with its first store measuring 600 sq.ft. opening in Nungambakkam, Chennai. With over three generations of experience in the food and grocery business, the retailer currently operates a chain of 33 outlets, all across different locations in Chennai barring one store in the neighboring city of Coimbatore. Its 34th outlet will open in Pondicherry by the end of May.

Nuts 'n' Spices current owner Sunil Sanklecha had envisioned a store that had a lucrative business in the country considering the numerous change in trends in consumer behavior. Though he had thought

of the idea of a specialty store during the early 1990s, his vision only came into reality by 1999. When the moment came, Sanklecha confidently branched into launching a specialty store as he chose to move away from his grandfather's and father's traditional grocery business model. "It is a more specialized category where we have 3,500-3,600 SKUs across products like dry fruits, spices, orthodox tea, imported chocolates and biscuits, health foods, etc," says Sanklecha, adding that Nuts 'n' Spices own store label contributes about 45-50 per cent of the overall sales today. It has categories like dry fruits, spices and tea. These are our main categories where we do an average of 30-40 per cent sales. The rest are gourmet food and health products."

Dehydrated fruits like kiwi, mango, papaya, pineapple have also been recently added into the product mix. Besides nuts, dry fruits and seeds, Nuts 'n' Spices also offers a range of herbs and seasonings such as oregano, basil, thyme, parsley, mixed herbs, etc. The varieties of spice powders and condiments include Kashmir chilly powder, coriander seeds powder, cardamom, clove, cinnamon, nutmeg, among others. The store also stocks syrups and juices from International and Indian brands. From Pringles

to Doritos to Mumbai's sukhi bhel, low calorie namkeens, oil-free papads, mixtures and other diet snacks for the fitness freaks, the store serves as a one-stop destination for a whole lot of snacking ideas.

"We deal only with food products and don't carry any non-food products. Even in the food category, we don't carry staples, groceries, fresh & other daily needs supermarket products. Our primary focus is on value-added products like dry fruits, nuts, spices and all other premium food products associated with health and wellness," says Sanklecha. "By the end of the day there are statistics to help us, take a call on whether to chase any of the products on sourcing, or whether we need to upgrade certain categories. Ninety-nine per cent of our products have a long shelf life. We do not deal with groceries at all or any fresh products. The only short shelf life categories that we have are curd, ice-cream, etc."

Nuts 'n' Spices also sources and blends the very best orthodox tea. Oolong, black, green, white and black pearls from Darjeeling, Nilgiri and Assam are available in their in-house label, Cup 'n' Saucer. The teas are available in attractive gift packs in velvet bags, wooden boxes and zardosi pouches. Similarly, their variety of areca nuts, mouth fresheners and

The 33 Nuts 'n' Spices stores have a 1,000-1,200 sq.ft. store format and it costs about Rs. 60-75 lakh to set up a Nuts 'n' Spices store, depending on the location. As a premium brand, its preferred locations are places with a cosmopolitan character and with a mix of residential and commercial establishments.

➔ NUTS 'N' SPICES: FACT BOX

- Name of the retailer/ brand name: **Nuts 'n' Spices**
- Headquarters: **Chennai**
- Date of start of operation of first store: **16-06-1999**
- City/ies where the stores operate: **Chennai, Coimbatore, Pondicherry (to open)**
- Retail format of stores: **Gourmet/ Specialty/ Convenience**
- Average size of stores: **1,200 sq.ft.**
- Are the stores self-owned/ rented/ leased: **Partly owned, rest on lease/ rent**
- Investment needed for setting up a store: **INR 75 lakh**
- Time it take for a store to break even: **12-24 months**
- Number of stores currently in operation and where: **32 in Chennai, one in Coimbatore, one in Pondicherry (to be opened)**
- Total retail space under operation: **40,000 sq.ft.**
- Average monthly sales: **INR 6.5 crore**
- Average footfall per day: **Varies from store to store**
- Sales growth y-o-y: **6%**
- Number of employees: **300+**





Sips and drinks *to chill and relax*

With more and more Indians open to the idea of trying out newer and different flavors, it is a good time for beverage companies to launch new products and variants. Packaged beverages are gaining traction with Indian consumers who are now frequently reaching for products that reflect the core consumer trends dominating the market: taste, functionality, added vitamins, proteins and minerals, as well as unique blends that consumers might not experiment with on their own. Moving forward, retailers and brands are unanimous that consumers will respond enthusiastically to more creative combinations within the category.

By Sanjay Kumar

India's beverages market stood at USD 2.56 billion in 2015, and it is projected to reach USD 4.48 billion by 2020, exhibiting a CAGR of 20.55%, in value terms, during 2015-2020. The beverage market in India is bifurcated mainly into alcoholic and non-alcoholic beverage. The further segmentation of non-alcoholic beverage in India includes carbonated and non-carbonated beverage. The main segments in the non-carbonated non-alcoholic segment comprise juices, bottled water, energy drinks, ready-to-drink tea and coffee, flavored milk, malted drinks and other drinks. Tea and coffee hold a lion's share in the non-carbonated non-alcoholic segment, which confirms that traditional beverages continue to rule this category.

The consumption of tea in India is not a seasonal phenomenon but rather an obsession, with people drinking "chai" or tea at any time of the day, irrespective of the temperature. Indians can be found sipping tea from road side stalls, established eateries and at their homes across the country. Tea consumption occupies more than 79% share in the Indian non-alcoholic beverage market. With a domestic consumption of close to 1,000 million kilograms, the country is the world's biggest consumer of tea. However, its per capita consumption, at 800 grams, is lower than many other countries such as the UK and Afghanistan (2 kg each) and China and Iran (1 kg each). Despite this consumption, the market for tea by the year 2020 is expected to grow annually by 20-23% and is estimated to jump three times its size in 2017. Given the huge size of the tea market and its potential to grow, India is witnessing a spurt in the number of established companies and start-ups that are striving to offer varieties of this beverage, and to establish a foothold in tea retail outlets and consumption market at home.



of the total non-alcoholic beverages market in India. Major brands that are present in the Indian market are Thums Up, Coca-Cola, Pepsi, Sprite, Fanta, Limca, Mirinda, etc.

The major segments in the carbonated market are also categorized on the basis of flavors used, i.e., cola-flavored drinks, lime-lemon flavored drinks, orange flavored drinks and other drinks. Currently, the dominant trend in flavors is lime-lemon flavored drinks in India. In terms of end users, the urban segment dominates the Indian carbonated non-alcoholic market with a significant market share. But gradually, the rural segment is expected to take on the market. Region-wise, a majority of the consumers hail from the west of India followed by the South where people have to endure the maximum temperature.

However, health concerns of consumers are prompting the manufacturers to shape their corporate strategy with diet and low-calorie varieties in the global market. An increasing number of people are showing heightened concern about the harmful chemicals and preservatives added in carbonated soft drinks, which has led to declining sales of carbonated drinks in the Indian market. To face these challenges, manufacturers are bringing new flavors and low-sugar diet drinks into the market, which will help grab the declining growth. However, the carbonated drinks market in India is still expected to showcase a double digit growth in India in the next five years.

The per capita consumption of soft drinks in India is still around 5% of that in the U.S., indicating a strong growth potential for the CSD category. But the industry is now moving beyond simply offering low or reduced-sugar versions of their brands by reformulating their products to include natural rather than artificial additives. Even the Prime Minister of India Narendra Modi has urged big players like Coca-Cola and Pepsi to add 2% of fruit content in their aerated drinks, which will help farmers to cultivate more fruits and earn more profit. This kind of initiative will

The carbonated beverage category comprises majorly soft drinks, which currently account for nearly half of the overall Indian soft drinks market. Carbonated drinks are categorized as those drinks that bubble and fizz with dissolved carbon dioxide gas in it. Many people find the fizzy sensation to be pleasing and are fond of the slight different taste that carbon dioxide provides. On the whole, the market for beverages in India and elsewhere is getting more segmented and niche than ever before. The expanding products range is majorly fuelled by the food processing sector and with growth of the sector, the category is bound to carry forward the acceleration.

The Indian carbonated market and markets globally have for long been the duopoly of Coca-Cola and PepsiCo. The Coca-Cola Company leads the world market for carbonated beverages with a share of more than 48% in 2015. The Coca-Cola Company has historically been considered PepsiCo's primary competitor in the Carbonated Soft Drinks (CSD) market. According to *India Carbonated Drinks Market Overview*, carbonated or aerated drinks account for more than 40%



“

The market consisting of juices, carbonated soft drinks and bottled water is estimated to be worth around Rs. 65,000 crore and this market is estimated to grow at CAGR of more than 20%. The fruit-based juice market is one of the fastest growing categories in the beverages segment. It has been growing at a CAGR of over 25-30 per cent in the past decade.

— **Abhishek Singh**
Director, Manpasand
Beverages Ltd



Become water-wise with the new **#Cuttingpaani** campaign by Livepure

The campaign #CuttingPaani urges consumers to adopt the habit of asking for a half glass of water instead of full as you can always ask for more if needed. This spin on the 'cutting chai' idea is expected to resonate with the common man.



Trust Livepure to come up with the most purposeful campaigns. The brand recently launched a campaign #Cuttingpaani, which is an extended campaign of #FinishYourGlass that was launched by Livepure in June last year and ran till August 2017. In #FinishYourGlass campaign, the company urged people to drink adequate amount of water to help them improve their health. In their new campaign, Livepure has come up with a very simple and creative way to save the day-to-day wastage of water.

The #CuttingPaani initiative by Livepure is all about becoming water wise and it introduces the concept of using only the amount of water we actually need.

The campaign pushes consumers to adopt the habit of asking for a half a glass of water instead of full, since you can always ask for more if needed. This is an idea that will resonate with the common man, since 'cutting chai' is a phrase used widely by Indians who want tea! The focus is to create awareness about this fact by urging restaurant owners to serve and the general public only the needful amount of water (aka #CuttingPaani) and thereby curb the wastage of water, which is inaccessible in so many regions across the world.

#CuttingPaani campaign has three films that highlight the fact that saving drinking water is of utmost importance. All the three films are picturized at different locations, settings and scenarios. Through different dialogues and situations, the one point that is highlighted is to not waste drinking water and save it by asking for "cutting" water, that is in accordance with someone's thirst level. For example, if the thirst is for a half glass of water, why waste the entire glass? Instead, one could ask for "cutting" water.

The production values are high and the setup is natural, establishing the concept of #CuttingPaani and amplifying the fact of optimizing the usage of

“Agar pyaas cutting ki hui, toh full glass kyun? Bacha huya paani koi aur pee lega! Paani Bachao, Cutting Mangao!”

water by taking only what is required, whether you're eating at a restaurant or visiting someone's office.

The campaign's main themes

Say Yes to #CuttingPaani at restaurants & cafes: A young couple visits a restaurant and is seen looking at the menu and deciding on what to order. The boy hands over the menu to the girl. Meanwhile, the waiter arrives with a jar of water and glasses. The boy thanks him but to his surprise the waiter holds the jar and stands beside their table. Surprised, the boy looks at him, to which the waiter asks, "Sir, paani full lenge ya cutting (Will you have a full glass of water or cutting?)". In bewilderment, the boy and the girl look at the waiter and the boy asks what exactly is "cutting" paani. The waiter replies, "cutting" means half a glass. If the thirst for water is for half a glass, then why have the entire glass of water? Someone else can have the water that is saved. Isn't it?". The boy and girl look at each other and recognize that it is a very thoughtful idea and ask for "cutting" paani. The waiter gives both of them half a glass of water. The video ends with the voiceover of the waiter saying – "Paani Bachao, Cutting Mangao" (Save water, order cutting).

Say Yes To #CuttingPaani at home: The film begins with a man welcoming his friend to his house. The host shows his displeasure that the guest has arrived half an hour late. They have a friendly banter on the same. Both the men are seen sitting in the host's balcony with a game of chess laid in front of them, which they start playing. The host's daughter arrives with half a glass of water for the guest. The father, astonished, asks why has she got only a half glass of



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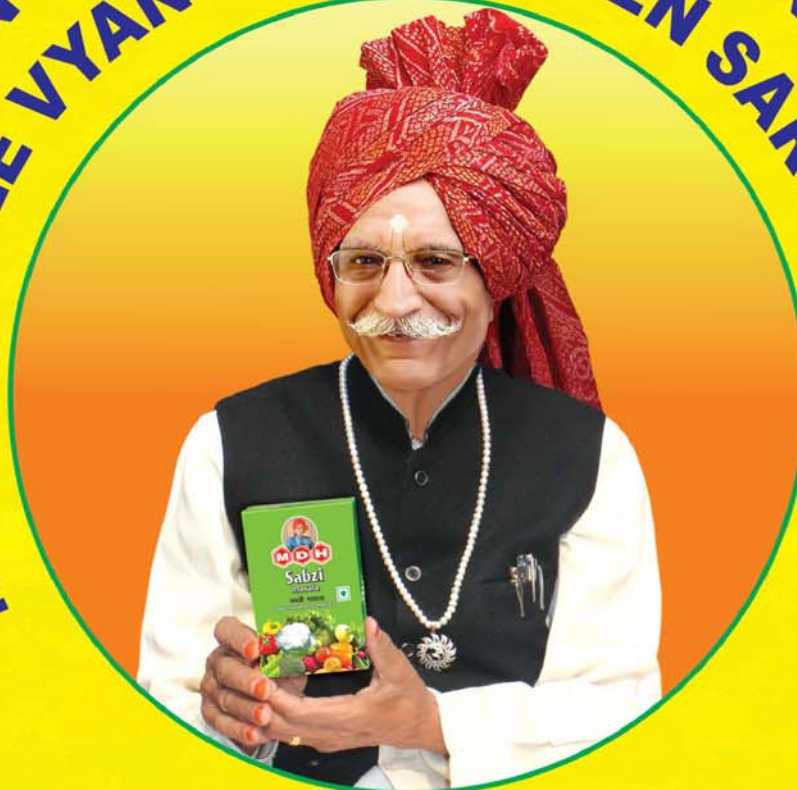
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