

Supply Chain & Logistics

Managing global food chain risks with better supply chain resilience and enhanced flexibility.

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Online Retail

E-groceries are trying out different models around delivery. Which model can grab major market share?

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Category Watch: Frozen Food

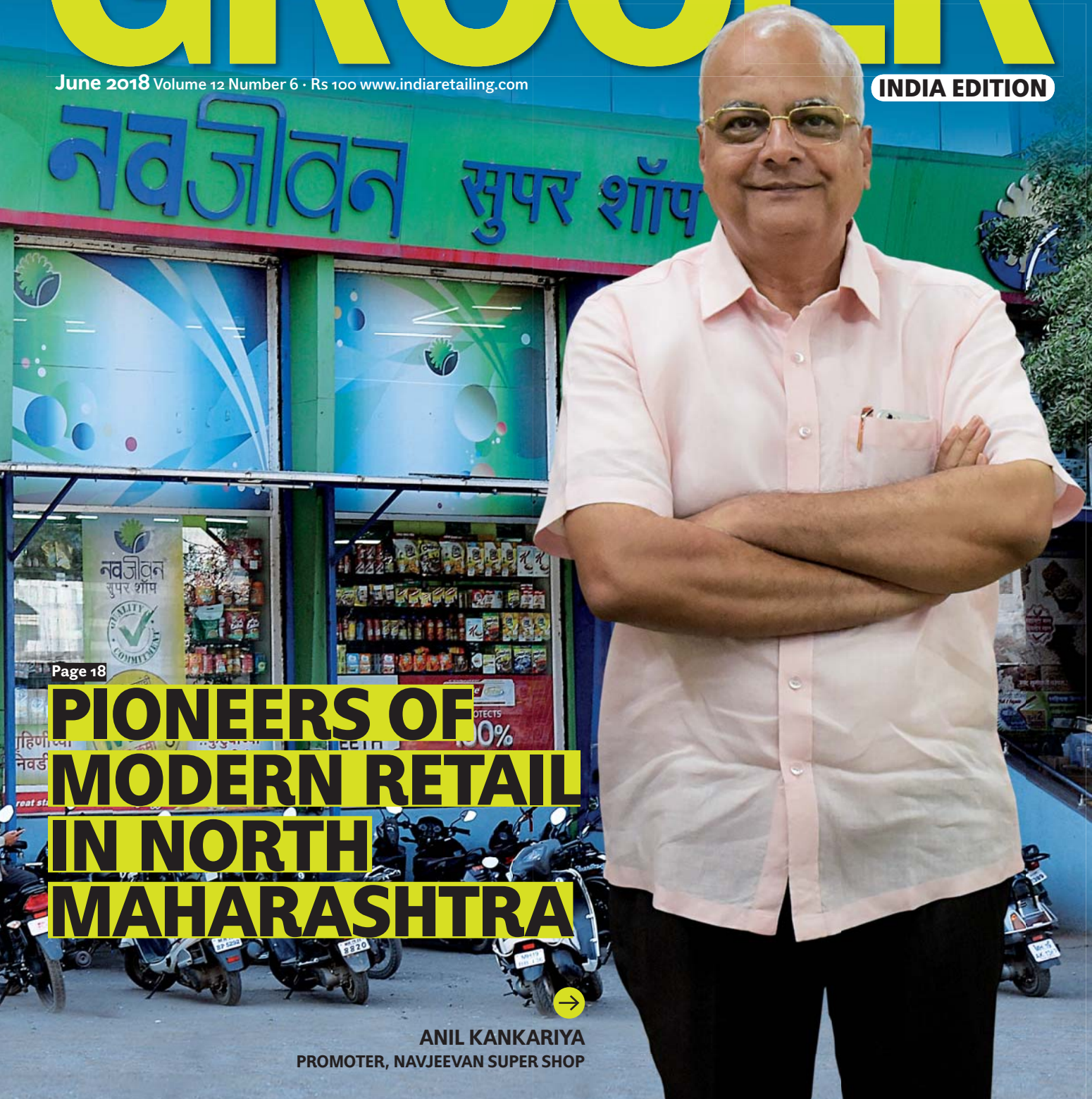
Companies are emphasizing their health-and-wellness innovations, and adding flavor and variety to their products.

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PROGRESSIVE GROCCER

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INDIA EDITION



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PIONEERS OF MODERN RETAIL IN NORTH MAHARASHTRA



ANIL KANKARIYA
PROMOTER, NAVJEEVAN SUPER SHOP

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In the era that we live in, there is a compelling case for grocery stores to use cashback to guarantee customer loyalty. With the rise of organized retail, any venture in this direction is a potential disruptor. This is a relatively uncharted territory, and it is a significant business opportunity waiting to be knocked.

With value being highly sought after, digital wallets and cashback apps can extend this model to the traditional grocery with widespread applicability. Purchases at the grocery store are more frequent than at any other channel and one can imagine the magnitude of cashbacks that the digital wallet's customers stand to win if they shop from their partner retailers. Moreover, digital wallets can achieve a definitive loyalty that will make switching very difficult. This value can be later redeemed at any of the partner online stores. Delving deeper into customization, by partnering with grocery stores, cashback apps can achieve category-specific focus with a high accuracy.

The location of the neighborhood grocery store and the customer can act as a marker and an indicator of how to target a particular segment, which products to provide the offer on and, more importantly, where and how to redeem them. Retailers can offer stretch incentives on total baskets over a certain size to customers staying away from the store to compensate for higher travel costs.

There exists a compelling case for cashback apps and digital wallets to expand into newer categories and add another set of customers to their already-burgeoning user base.


Amitabh Taneja
 Editor-in-Chief

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Pioneers of Modern Retail in North Maharashtra

Navjeevan Super Shop, which has been in business for over 70 years now, is widely regarded as the supermarket pioneer in north Maharashtra. Beginning its journey from a humble kirana store in Jalgaon in 1946, it opened its first self-service store in the city in 1993 and since then, it has taken impressive strides in modern food and grocery retailing. From 2007 onwards, the firm has been on an expansion drive. As of date, there are seven Navjeevan supermarkets in operation, all in Jalgaon, with a retail area spanning 21,000 square feet, which bring in a monthly revenue of about Rs. 5 crore.



CATEGORY WATCH

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Warming up to the new fresh

The frozen foods market in India has been clocking a double digit growth in recent years and this pace of growth is likely to continue in the future. Though the infrastructural limitation of cold chain poses a formidable challenge in an already space-starved retail place, the change in our lifestyle, work environment and food habits are acting as drivers for pushing the acceptance and demand for frozen foods. Frozen foods provide a great deal of convenience in today's hectic pace of life.



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Managing Global Food Chain Risks

Food Supply Chain Management for better supply chain resilience and enhanced flexibility.

By Ajay Kakra

The food industry is faced with multiple challenges as modern day supply chains continue to rapidly evolve and transform. The evolution of food supply chains is based on the changes in the outlook of the food industry and its key stakeholders. Consumers, regulators, governments and other stakeholders are becoming more conscious of what they are eating, source of food ingredient, quality of food and disclosure about the content of food items consumed. A key challenge is managing risk while optimising cost across multi-commodity supply chains spread across geographies. Consequently, with an increased number of supply chain intermediaries spread across multiple geographies, it has become increasingly difficult to predict and manage supply chain risks. The scenario gets all the more aggravated with geo-political changes, increasing regulatory pressures and growing consumer awareness. In this environment, the question isn't whether disruptions will happen, but what and when. Proactive risk identification and mitigation is the key to achieving better supply chain resilience.

Supply chain efficiency v/s supply chain resilience: Supply chain resilience aims towards risk reduction as opposed to supply chain efficiency, which is directed at improving a company's financial performance. Both require dealing with risks and recurrent risks (such as demand fluctuations). Effective supply chain management is essential to guarantee food safety. Every link in the chain affects the quality of final products. Changing consumer preferences, changes in production and distribution methods, evolving trade & travel, shifts in climatic and environmental factors and growing anti-microbial resistance – all increase the probability of occurrence of food hazards and food safety incidents. The emphasis on quality parameters pertaining to safety of food has also taken center-stage in the global food trade. Increasing incomes, urbanisation, literacy, improved infrastructure and closer ties to global trends, especially during the last decade, are driving the changes in consumer demand, thus spurring action amongst policymakers to address food safety risks on a priority basis and avoid disruptions in the supply chain.



without having the effects ripple to other regions. Our research with MIT identified the following critical areas of supply chain risk. The Business Continuity Institute's Global Supply Chain Resilience survey indicates the following as the major impacts of supply chain disruptions:

- Loss of productivity
- Customer complaints received
- Increased cost of working
- Service outcome impaired
- Loss of revenue
- Damage to brand/reputation/image
- Product release delay
- Product recall/withdrawal
- Payment of service credits
- Share price fall
- Stakeholder/shareholder concern



Critical areas of food supply chain risks

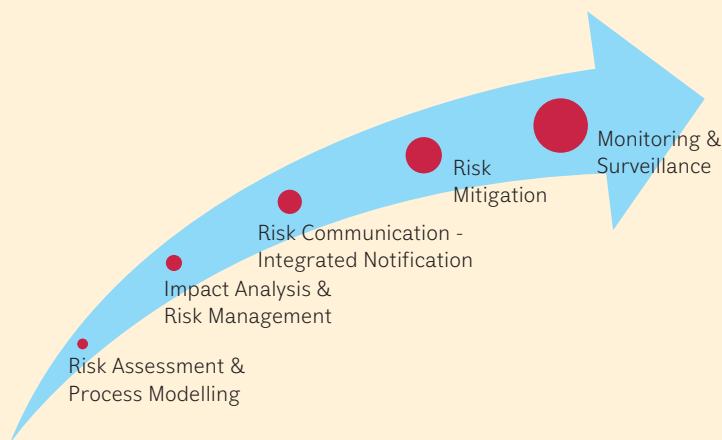
Risk, in layman's terms, is understood as being vulnerable and is defined by the Oxford English Dictionary as "a situation involving exposure to danger". Risks, in food safety parlance, can be defined as a function of probability of an adverse health effect and the severity of that effect (death, hospitalisation, medication, etc.) when exposed to a specific food hazard. Any biological, chemical or physical agent in, or condition of food, with the potential to cause an adverse health effect is termed as hazard. Food adulterants, allergens, use of unauthorised/non-food grade surfaces during food production, use of prohibited food & feed ingredients can be all termed as hazards. When supply chains are exposed to these hazards, in the severity of causing an adverse effect on human health, the underlying causative factors can be termed as Food Safety Risks.

On the basis of their subsequent effect, food safety risks can be classified into bio-physical risk, product risk, process risk, and supplier risk. These risks lead to consumer/health risks, trade & market risks, environmental risks and socio-economic risks.

Categorising disruptions

The risks of disruptions aren't equal, nor are the consequences. Disruptions, their occurrence and severity, vary from organisation to organisation, from process to process and from region to region. Therefore, it is advisable to define the sensitivities in your supply chain and introduce relevant supply chain containment strategies. Supply chain containment strategies focus on: 1) Segmenting the supply chain and 2) Regionalising the supply chain to contain regional disruptions more efficiently

Steps to achieve better supply chain resilience through proactive supply chain risk analysis & management



- Delayed cash flows
- Expected increase in regulatory scrutiny
- Loss of regular customers
- Fine by regulator for non-compliance

Supply chain disruptions also attract significant costs with regards to risk mitigation & containment and in facilitating recovery to attain status quo. As per the BCI survey results, as a result of various disruptions, 15% of respondents experienced costs in excess of €1M and 9% experienced a single event disruption that cost in excess of €1M. Considering both the direct and indirect costs (firm's reputation, product integrity, share price & valuation, brand equity) that a firm might accrue as a result of these disruptions, it becomes quintessential for the business to effectively manage and timely respond to such disruptions or probability of disruptions (risks).

A more coordinated and strategic approach is needed, one that takes a holistic view to identify, monitor and mitigate weak links in the supply chain from farm to fork.



Pioneers of Modern Retail in North Maharashtra

Navjeevan Super Shop, which has been in business for over 70 years now, is widely regarded as the supermarket pioneer in north Maharashtra. Beginning its journey from a humble kirana store in Jalgaon in 1946, it opened its first self-service store in the city in 1993 and since then, it has taken impressive strides in modern food and grocery retailing. From 2007 onwards, Navjeevan has been on an expansion drive and opened five stores in quick succession. As of date, there are seven Navjeevan supermarkets in operation, all in Jalgaon, with a retail area spanning 21,000 square feet, which bring in a monthly revenue of about Rs. 5 crore.

“

For the people in Jalgaon, Navjeevan is the go-to neighborhood store for buying the best quality groceries, dry fruits and spices.

— ANIL KANKARIYA
Promoter, Navjeevan,
Super Shop

By Sanjay Kumar

How difficult and challenging was it to open and expand modern retail outlets in the backwaters of Maharashtra?

Initially, it was tedious and a somewhat difficult task to start and operate a modern day self-service retail shop in a city like Jalgaon. Getting access to funding resources was a problem. The cooperative banks here refused us the loan for the new store as they did not

understand the concept of modern retail. Even we had our doubts then as to whether the customers would adapt to the new setting. As it were, our first super store in 1993 opened to a huge response from the public. But after the initial euphoria, sales plummeted and it took us two years to reach the break-even point. For the first two years of our supermarket operations, the sales were even less



brother Sunil) we held our nerves. Even though it was a difficult period for us, we somehow kept the faith that modern retailing was the future and the right thing to do. Our belief in modern trade was reinforced by two incidents. The first was when our loan (without mortgage) got approved in a day by Bank of Baroda. Its Regional Manager appreciated the pioneering path we had embarked on and remarked that we were following the right trend. The second incident was when I saw Jalgaon's top physician Mr. Gupta picking up the shopping basket and enjoying the shopping experience in the store. To see him shop at our store spoke volubly of our shop's consumer appeal. Such is the rush of patients at his clinic that people have to wait for long hours to get an appointment and here he was – in person – shopping at our store for a length of time! Our intuition that modern retail is the future and that we were on the right track got bolstered. We understood that what we were doing was quite innovative and it would take some time for the concept to filter down the public consciousness and gain mass acceptability. The sense that we were doing something path-breaking in a traditional city like Jalgaon gave us great satisfaction and that feeling kept us going.

Till the time we had remained as traditional retailers, there was no visible competition. But after converting to the supermarket format, about 600 other traditional retailers in Jalgaon turned out to be our competition.

than the historical level of our old provision store (which closed after the opening of the new store), which had clocked annual sales of Rs. 10.8 million in the year 1992.

The less-than-expected sales forced us to deliberate on the issue. Till the time we had remained as traditional retailers, there was no visible competition. But after converting to the supermarket format, about 600 other traditional retailers in Jalgaon turned out to be our competition. This happened because the message that got conveyed to customers was that our new store was expensive because such a big set-up requires quite a large expense to maintain and run the operations. From whose pocket would Navjeevan earn it? For us, it took a lot of effort to break this pricey image of our store and reestablish the brand image as being pocket friendly to the customers.

A decline in sales for the newly opened Navjeevan supermarket must have been disheartening. What kept you going and retain your faith in modern trade?

By this time, our younger brother Sunil, a qualified CA, had also joined the business and together (with elder brother Kantilalji Kankariya and younger

NAVJEEVAN: FACT BOX

- Name of the retailer/ brand: **Navjeevan Super Shop**
- Type of store format: **Supermarket**
- Date of opening of first supermarket store: **13th August, 1993**
- Number of stores in operation today: **7**
- Location of store (s): **Jalgaon District, North Maharashtra**
- Total retail space under operation: **21,000 sq.ft**
- Are the stores self-owned/ rented/ leased: **5 owned, 2 leased**
- Average monthly sales: **Rs. 5 crore**
- Average bill size: **Rs. 550**
- Average footfall per month across all stores: **90,000**
- Sales per sq.ft: **Rs. 2,400**
- SKU count per store: **5,500**
- Catchment areas: **Jalgaon District**
- Average same store sales growth: **6-7%**
- Number of employees: **175**





FROZEN FOODS: WARMING UP TO THE NEW FRESH

The frozen foods market in India has been clocking a double digit growth in recent years and this pace of growth is likely to continue in the future. Though the infrastructural limitation of cold chain poses a formidable challenge in an already space-starved retail place, the change in our lifestyle, work environment and food habits are acting as drivers for pushing the acceptance and demand for frozen foods. Research suggests that consumers appreciate the variety, taste, ingredient quality, and dietary options of today's frozen meals. On the manufacturer side, companies are emphasizing their health-and-wellness innovations: trans-fat reduction or elimination, saturated fat reduction, introduction of products with whole grains and fiber, sugar and sodium reduction, and portion control, besides also adding to the flavor and variety of their frozen food products.

By **Sanjay Kumar**



India's frozen food market is believed to be pegged at about USD 485.7 million currently, extrapolating from various studies and industry estimates. As per one such estimate, the Indian frozen food market had total revenues of \$335.2 million in 2014, representing a compound annual growth rate (CAGR) of 14% between 2010 and 2014. One industry forecast suggests that the frozen food industry in India is projected to grow at a CAGR of over 16% to reach \$ 754 million by 2023.

A TechSci Research report, "India Frozen Food Market By Product Type, By Organized Vs Unorganized, Competition Forecast and Opportunities, 2011 - 2021", says that India's frozen food market is projected to grow at a CAGR of around 15%, during 2016-2021, on account of an increasing number of modern retail chains, rising number of refrigeration facilities in small retail shops and rural households, rapid development of fast food chains, aggressive marketing strategies by major frozen food manufacturers, and longer shelf life and easy availability of frozen food products. Another report, "India Frozen Food Market Outlook, 2021", says that the frozen food market of India has been growing at a CAGR of 15-20% in the last four years.

According to **Shankar R Nair – National Category Manager – Frozen and Dairy, SPAR Hypermarkets**, "The frozen category in India has been recording a healthy growth at a CAGR of 20-25% thanks to increasing customer appetite and acceptance for frozen foods complemented by an increase

in the available freezer space in the retail domain. A deeper analysis of the industry reveals that the market for frozen food has the potential to grow three-fold over the next five years. However, there are certain constraints limiting its growth such as infrastructure, which calls for a massive investment in transportation (cold chain) and storage required to serve modern retail and the food service segment.”

The market is segregated into six segments: frozen vegetables, frozen snacks, frozen seafood, frozen poultry, frozen red meat and others. Frozen snacks and vegetables are the largest category in terms of sales volume whereas frozen poultry, seafood and red meat have started gaining in currency in recent years. Not until long ago, the frozen food industry in India was limited to only basic frozen vegetables and French fries. Even today, though India is the second-largest producer of vegetables and contributes about 14% of the total world production of vegetables, only 2% of the entire production of vegetables is frozen.

As per industry estimates, the frozen vegetables market constitutes 31% of the total frozen food market and this share is anticipated to increase further. The category is expected to grow at a CAGR of 17.65% over the next six years due to changed lifestyle, year round availability and price stability of frozen

vegetables. The demand for frozen vegetables is increasing in the country as Tier-I and Tier-II cities are aware of the brands and products. The number of working women has increased in these cities, which is generating greater demand for such ready-to-eat products. Restaurants have also started perceiving frozen vegetables as a good alternative that obviates the need for more labor and effort required in using fresh vegetables. Quick service restaurants have also contributed significantly to the demand for frozen vegetables. Green peas are the most popular frozen processed vegetable, produced and purchased in India, followed by mixed green vegetables and corn.

Solitaire Drugs and Pharma Pvt. Ltd (Food and Beverage Division) is one of leading manufacturers and exporters of frozen vegetables, frozen fruits, frozen ready to cook, pulps, jams, pickles, among other products today. The company has three popular brands under its banner – I-Freeze, Snackys and Shagun. “The company started its operations in 2014 and supplies its products to Cash and Carry stores, institutions, modern trade and general trade. I believe all these markets play a significant role in building a brand. We are also into private label and the target consumers for our products include housewives, school and college students and working people in the 18-45 age group. Our products are also preferred for parties and small gatherings,” says **Avnish Kumar Jain, Chairman cum Managing Director, Solitaire Drugs and Pharma Pvt. Ltd (Food and Beverage Division)**. “Our vision is to be the preferred first choice supplier for all our customers’ requirements and our mission is to attain market leadership in our business areas by creating customer delight through value, innovation, and service. We are growing rapidly in north India and our target is to expand pan- India. Soon, we will be starting operations in south India and then will expand to other markets,” says its **Executive Director, Sulabh Jain**.

Until about a few years ago, frozen food players were largely dependent on the export market, which helped them earn a large part of their revenues. However, with the growing importance and penetration of frozen food in the commercial and retail sector, the domestic market has also turned out to be lucrative now. Take the case of Farsan Foods India, a leader in traditional Indian savory snacks – samosas, spring rolls, kachoris, patties, tikis, veg burgers, bhajis, among others – which has set up its factory in India now to produce quality hand-made frozen snacks for the Indian market. The company is originally based out of Leicester, UK, but has opened a new factory in Halol, Gujarat. “We make authentic quality products at an affordable price besides also supplying to the

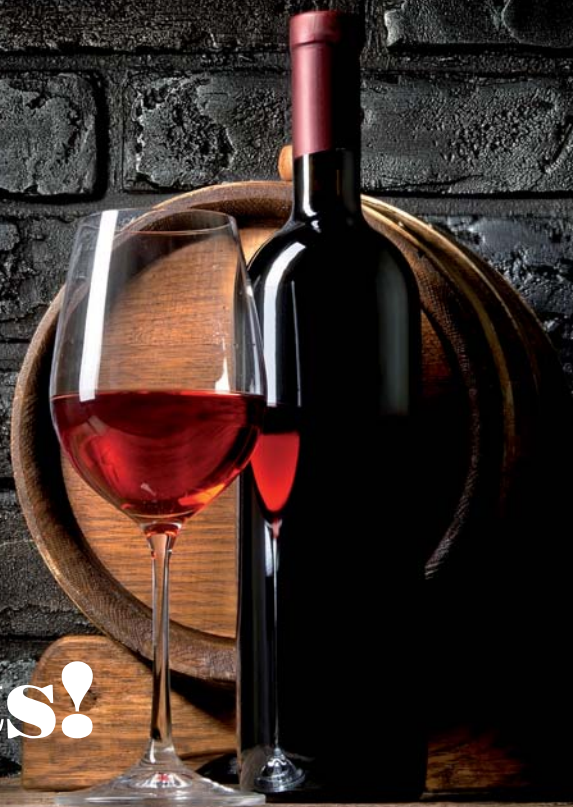


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— **Shankar R Nair**
National Category Manager – Frozen and Dairy, SPAR Hypermarkets



Sparkling WINE calls the shots!



Growing consumer inclination towards global brands and beverages with less alcohol content has turned out to be a great proposition for existing wine players and new entrants to play with innovative flavours and introduce finer qualities of wine in the country.

In a conversation with *Progressive Grocer* India, **Domenico Scimone, General Manager at Carpenè Malvolti S.p.a.**, shares his views on how new trends and consumption patterns are shaping the growth of sparkling wines.

What are your views about the global wine industry? What is fueling the growth of wines globally?

At the moment, the wine market is more or less stable everywhere, globally. There is only one category that has continued to grow in the last three years and that is sparkling wine – thanks to their superior quality. In fact, the sparkling wine category is just eight per cent of the total wine production of the world.

The sparkling wine category includes champagne, white wine, cava, etc. The market for champagne is much more stable in terms of volume in the last three years. The second is the cava category, which is moving at a normal pace of five per cent. Today, the consumption of sparkling wine is not limited to occasions like 'Thanksgiving'. Rather, developed taste preferences have made it a usual drink.

How is the Indian wine industry doing? What are your plans for the Indian market?

We entered the country seven years ago with Aspri Spirits as our distribution partners. I believe India is a potential country in all aspects to produce and also to understand consumption trends. However, at the moment, our winery is not planning to invest in the country; rather we are planning to strengthen our brand presence in the country.

Currently, we are present in around 65 countries across the globe. In Asian countries like India, our goal is to improve our distribution and positioning. The most important part of our plan is to position our Prosecco superior wine in India, which is our finest sparkling wine and we want to build a strong brand image and demand for it. Secondly, we would like to add new variants such as grappa and brandy to our distribution channel in India.

Which consumer segments are you targeting? How do you see the consumption patterns changing?

We are first looking to establish our Carpenè Malvolti brand in India, which is a leading brand in the Prosecco category. Managed by the Carpenè



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