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PROGRESSIVE GROCER

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INDIA EDITION



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Products that reflect the quality standards and inventive thinking of their companies

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Whether you're a supplier or a retailer, we all face the same challenge today: How do I achieve success in a fiercely competitive business environment where it is becoming increasingly challenging to reach consumers immersed in a world of choice and differentiation?

One key to driving success in any kind of environment is innovation. With competition in the F&G space heating up in the past few years, brands and retailers have been coming up with new ideas and propositions to stay ahead of the curve. They understand that to survive and thrive in today's cutthroat market, companies need to embrace innovation approaches for truly unlocking and optimizing the growth potential of every product they launch.

But, while many companies swear to have made innovation a part of their overall strategy, very few have been able to successfully deliver on the promise of true innovation. In this issue of the magazine, our story *Breaking the Mold: With Force and Fanfare* (page 48), looks at a range of exemplary food products that reflect inventive thinking in coming up with as-yet-unthought-of concepts and successfully morphing them into products of high quality standards and consumer mainstays.

In selecting these products, we came across several areas of opportunity for innovation: in areas such as health and wellness, meeting the needs of varying demographics, and tapping into the markets for minimally processed foods. Turn the pages and read how savvy companies and retailers are heeding consumers' demands and posting impressive growth.



Amitabh Taneja
Editor-in-Chief

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Servicing South India's Retail Environment

Established in 1905, Nilgiris is one of the pioneers of organized retail in India and a heritage brand with a storied legacy of delivering quality customer service. Operating under the banner of Future Group, Nilgiris spawns 215 F&G outlets across Tamil Nadu, Karnataka and Kerala with a total retail area spanning 4.45 lakh sq. ft. CEO Ventakeshwar Kumar outlines his plans to propel future growth by going for a more contemporary look with the help of more updated technology.



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FOOD INNOVATION

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How to innovate to make your brand a big hit



We bring you examples of innovation in products that reflect a wide variety of on-trend formats, new concepts, and ingredient and flavor mashups. These success stories are rooted in a compelling value proposition of brands that have positioned themselves to exploit the world's soon to be third-largest food and beverage market.

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- ◆ Dried Cranberries
- ◆ Dried Blueberries
- ◆ Black Currants
- ◆ Pumpkin Seeds Kernels
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Market Update

IG International leads the way for apple importers in India

IG International in collaboration with Stemilt Growers, the leading North American pipfruit supplier, has been successfully fulfilling the demand of organic produce in the country. With fresh produce procurement spanning 22 countries and handling capacities of over 31 varieties of fruits, the company delivers on the diversified tastes of Indian markets. Dealing with the core activity of importing fresh fruits from all over the world, IG currently secures the best of exotic fruits all year round to supply the demand of high-quality fresh produce in India.

The import giant recently celebrated the arrival of the 1000th container of apples from Stemilt Growers at an event held in New Delhi. Attended by several notable guests and dignitaries, Mark Wallace, Acting Minister Counsellor for USDA was the guest of honour at the event. The occasion saw individual presentations from Senior Exports Manager William Young of Stemilt Growers, Prakash Thakur, a progressive apple grower and celebrity chef Ajay Chopra.



L to R: Tarun Arora, Shubha Wadhawan, William Young & Ajay Chopra

The deliberations at the event outlined how Indians have developed a taste for exotic fruits owing to their high nutritional value and health benefits. Apple consumption in India has increased and stands at 2.23 MMT currently. Eating an apple a day provides 20% of the recommended daily value of dietary fibre, 8% of the antioxidant vitamin C, 7% of potassium and 130 calories sans fat, sodium and cholesterol. While some schools in India have made it mandatory for children to carry a fruit to school everyday, some are encouraging a morning fruit break. It was emphasized that fresh fruits constitute an important part of a healthy diet and that regular intake can boost auto-immune systems in children as well as adults.

Commenting on the occasion, Director, IG International, Tarun Arora said, "This celebration underlines our decade-old promise of delivering, exotic and delicious fruits to our customers. The arrival of the 1000th container of Stemilt apples is a testimony to the growth we are experiencing as part of this partnership. We look forward to continuing our association with Stemilt Growers and providing the freshest produce to our customers."

With the ever growing purchasing power of Indian middle class, the demand for good quality and hygienic fruits is increasing and IG has positioned itself to serve the burgeoning demand. The company is also looking to invest in farming as part of its CSR initiative. With their upcoming facility in Himachal Pradesh, they are looking to partner with local farmers. Having invested in enforcing international standards to grade and size apples in order to ensure high yields for farmers, IG is also looking to farm potatoes by using modern techniques of farming, packaging and storage.

FunFoods launches new marketing campaign

FunFoods by Dr. Oetkar has launched a new marketing campaign for its innovative new range of zero fat dressings with actress Sonali Bendre as brand ambassador. The campaign also stars upcoming star Amyra Dastur and introduces viewers to the new range and its various uses through digital, print, OOH and electronic media. The new range of products was launched last month on social media wherein popular celebrities shared their first interaction with the product. Keeping in mind key barriers such as high calorie content, limited use of dressings in salads and affordability, the campaign was conceptualized based on in-depth consumer research and the range's unique product attributes. The initiative has already reached over 7 million viewers and has successfully established the range as versatile and meant for health-conscious consumers. Commenting on the campaign launch, Oliver Mirza,



Managing Director & CEO, Dr. Oetkar India, said, "As a leader in the western sauces and spreads category, it is our endeavour to constantly innovate and offer consumer convenient ways to create delicious food. We are excited to launch a marketing campaign to grow the dressings' category and are confident that it will become a catalyst to realise FunFoods' vision of INR 500 crore by 2020."



Kwaliti launches breakfast cereals

Kwaliti, one of the leading manufacturers of masalas and instant mixes from the house of Pagariya Food Product Pvt. Ltd., announced the launch of its wide range of healthy and delicious breakfast cereals. The range is divided into three categories based on target age group. The adult range has variants such as corn flakes, almond honey and strawberry. Under the health range, cereals include ragi flakes, muesli crunchy, muesli mixed fruit, oats and white porridge. For children, they have a special assortment consisting of choco flakes, choco fills, strawberry fills, vanilla fills and fruit rings. Each of these is a combination of grains like wheat, ragi and oats and has been specially created keeping in mind the Indian palate. By introducing additional smaller packs of Rs. 5 and Rs. 10, the company is also targeting semi-urban and rural markets. The range is available at all big supermarkets such as Big Bazaar, D-mart, Metro, Spar etc. Alternatively, it is also available at leading online stores like Amazon, BigBasket and Flipkart.



Double Horse introduces six-minute Idiyappam powder

Double Horse, one of India's leading food brands, has launched six-minute Idiyappam powder – a first-of-its-kind product that makes cooking Idiyappam (string hoopers) incredibly easy. This specially processed powder makes the preparation process simple as there is no need to use boiling water to knead the dough. Water at room temperature can be added to process dough for soft Idiyappam in a matter of minutes. Apart from Idiyappam, this powder can be used in preparing south Indian dishes such as ada, kozhukatta and pathiri. The six-minute Idiyappam powder is available in variants of 1kg for Rs. 82.5 and 500 gm for Rs. 40 at leading grocery stores, supermarkets and hypermarkets around the globe.

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Milkbasket enhances customer experience using voice buying technology



Daily grocery delivery service Milkbasket announced the use of voice buying in the field of consumer technology. Grocery buyers using the delivery platform in India can now place their orders using voice commands only as the service can be used on Google Assistant and will soon be available on Amazon Alexa. With the advent of voice-based technologies, the user receives an incomparable experience that reduces order time by over 50%. The initiative is set to assist users who aren't as mobile savvy, as there is no need to unlock a smartphone and type in an order. This innovative consumer interface will also benefit senior citizens and the visually impaired and will include them in a buying ecosystem which is increasingly consumer centric. Co-founder & CEO Anant Goel commented on the initiative and said, "Milkbasket is synonymous to grocery and convenience for our customers and the introduction of voice buying further elevates their experience. This year is the year of reinvention for us, and we are proud to introduce the next-gen buying experience in India." In the near future, the firm is planning on introducing logistical efficiencies and last mile delivery services to create unique propositions in managing user experiences at a number of locations.

LOTS Wholesale Solutions unveils its first store in India

LOTS Wholesale Solutions, a part of the USD 50 billion Charoen Pokphand Group and a subsidiary of Siam Makro Public Company Ltd from Thailand, unveiled its first wholesale distribution centre in India at New Delhi. Inaugurated by the Hon'ble Minister of Food Processing Industries Harsimrat Kaur Badal, this is the first of the fifteen distribution centres the firm is aiming to open in India over the next three years. The company announced its foray into India at the World Foods India 2017 with a Memorandum of Understanding (MoU) worth 1,000 crores signed with the Ministry of Food Processing Industries. The newly launched store will cater to over 50,000 registered members, which include hotels, restaurants, caterers, kirana stores, corporates, MSMEs and institutions such as government agencies, educational institutes and hospitals. Spread over an area of 50,000 sq. ft., LOTS Wholesale Solutions store is fully equipped with modern warehousing and storage facilities for its members. With its initial footprint in Delhi NCR, the initiative will help generate 5,000 direct and indirect jobs over the next five years.



The company brings specially curated assortments, categorized into food and beverages, kitchenware, household appliances, home decor, furniture, bedding, textiles, electronic products, etc. LOTS Wholesale Solutions offers a varied set of benefits to its registered members, including a wide range of product selection at its stores based on detailed research specifically catered to the catchment area and market demand. Through transparent pricing, round the year promotions, consistent product availability, customized last mile delivery and credit facilities, the company aims to provide a hassle-free shopping experience to its members.

Under its region-specific business strategy, the initiative will provide support to home-grown brands and local suppliers. Fresh produce will be directly sourced from local farming communities, which will help farmers increase their income whilst reducing wastage during transportation and storage. The firm plans to bring a number of technological interventions in the retail segment through initiatives like geo-tagging of customers to ensure efficient deliveries, e-marking of products and electronic display of prices and expiry dates on store shelves. Members can shop at LOTS in several different ways that range from store walk-ins and delivery calls to ordering online through the B2b e-commerce portal.

Commenting on the occasion of the launch, Harsimrat Kaur Badal said, "The Indian retail sector is growing exponentially, and particularly the food retail segment is overtaking other prominent sectors. The arrival of multinational companies like CP Wholesale Solutions in India and the opening of chain stores in the country shows the popularity of Brand India in the world. India is on the road to becoming a global food market along with a global food factory."



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Britannia celebrates 100 years in India

Britannia Industries Limited recently marked the 100th anniversary of its founding in 1918. To celebrate the milestone, the company revealed a new brand identity and philosophy, illustrating the company's vision to become the 'future of food' – a global total foods company. As part of its centenary celebrations, Britannia unveiled its new logo that reflects its ability to thrive in the age of

digital consumers and constructive innovation. In addition, the company announced that it will launch 50 new products in the next 12 months and enter new and exciting categories including croissants and cream wafers. A range of innovations in cakes and rusk with formats as diverse as Swiss rolls, muffins and multi-grain rusk were also announced. Launches in other macro-snacking categories and

an exciting pipeline lies ahead. As a strategic thrust to strengthen back end integration to its dairy business, Britannia recently commenced a milk procurement programme in Ranjangaon, Maharashtra, which it has piloted with 8 milk collection centres spread across a network of 650 farmers. With end-to-end automated world-class facilities built for domestic and international markets, Britannia brings down the cost of manufacturing and strengthens the paradigm of being a least cost manufacturer. As the company gears up for the next 100 years, their R&D team is set to foster breakthrough innovation and create sustainable competitive advantage.



GreyOrange enables supply chain automation with Linear Sorter



Vivekanand, Country Manager, India and SAARC, GreyOrange

Robotics and supply chain automation company GreyOrange has announced the installation of its latest Linear Sorter at an international fashion company that provides fashion clothing and accessories across India. High-speed Linear Sorters are commonly used by e-commerce and third-party logistics companies to sort large volumes of parcels for distribution throughout the country. However, what is unique is that this Sorter located at a new distribution centre in Maharashtra will be used as an Order Consolidation Item Sorter for store retail distribution. It will sort and consolidate fashion items for distribution to over 500 locations in India, comprising exclusive brand outlets and shop-in-shop multi-brand stores. In addition, the Sorter will handle the segregation of returns inventory as this simplifies a series of time-consuming tasks handled manually. The team at GreyOrange evaluated the challenging requirements to handle large numbers of SKUs and achieve a high throughput during each shift. Equipped with advanced software, the Sorter uses hardware to adapt widely to the customised configurations built to handle daily requirements - such automation contributes immensely in improving productivity.

AS Retail introduces industrial grade POS hardware brand

AS Retail & Hospitality Pvt. Ltd recently launched a new True Industrial Grade POS hardware brand 'Raiser'. The Raiser brand currently includes essential hardware products for the retail and hospitality sectors. The CEO of AS Retail & Hospitality and Raiser brand



owner Amit Singh said, "We have been in the market as a solutions provider for over 10 years now. Our fruitful journey as well as the 'Make in India' push propelled us to select the best-of-the-best and offer a product-line that works best for the end-consumer." The product line currently includes all-in-one POS (touch & non-touch), MSR, display solutions, cash drawer and (VFD) pole display and innovative kiosks. A few more exciting products will be released through the year, not only to add to the range but also to offer the store-planners variety as well as effective choice. Visit www.raiserpos.com for more info.

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what's next



▲ **Cornitos adds to Pop N Crunch snack range**

Cornitos, the flagship brand of Greendot Health Foods Pvt. Ltd., has expanded its Pop N Crunch range by introducing natural sunflower seeds, roasted pumpkin seeds and an assorted party mix consisting of hot and spicy wasabi green peas, salted peanuts and corn nut. Cornitos Seeds range aims to make daily snacking habits healthy and is rich in vitamins, Omega-3, magnesium and zinc. The party mix is cholesterol-free and is ideal for house parties, snacking at the office and post-workout diets. The products are available in an easy-to-open and resealable pack of 200 gm and 30 gm/28 gm at a variable price range. Their functional design make them suitable for consumption while travelling and provide consumers an advantage of multiple-time product use instead of one-time snacking. The Pop N Crunch range is available at all major retail outlets across India.



▲ **Sleepy Owl launches New Orleans style coffee**

Sleepy Owl Coffee, one of India's fastest growing cold brew coffee brand has launched an all new flavor called cinnamon burst as an ode to the famous New Orleans style coffee. The product variant contains coffee, cinnamon and a hint of chicory. Ashwajeet Singh, Co-Founder, Sleepy Owl, remarked at the launch, "Cinnamon is an extremely compatible taste note with coffee, and that is why we decided to make it our new flavor. We aren't talking of a complete overhaul of flavor here, because we didn't want to completely obliterate the base coffee notes that make our brew special." The ready-to-drink cold brew coffee is marketed at a price point of Rs. 300-600 at all major retail outlets across Delhi-NCR.

► **Pee Pee Group extends coin chocolate range**

Pee Pee Group, leading manufacturer of coin chocolates under the Nature n Nature brand, has launched new varieties in their coin chocolate range. Already available in milk choco and white milk variants, the range now incorporates flavours such as coffee and strawberry. To produce the unique coffee coin chocolate, high-quality coffee bean powder is added to chocolate, which provides an authentic taste of coffee. Both the coffee and strawberry varieties come in scale pouch packs and in transparent gift boxes also. The company also manufactures chocolate bars under the Jumbo brand and all ingredients used in their products are natural and 100% vegetarian in nature.



▼ **BONN introduces La Americana Gourmet range**

Leading FMCG group BONN launched an exclusive La Americana Gourmet product range, which promises to flood Indian palates with a sumptuous and fulfilling breakfast option. The new premium product line includes a unique deck of products covering the entire taste gamut with whole wheat bran burger bread and whole wheat bran pav, garlic & multigrain footlongs, bran bread, honey oat bread, garlic oregano breads and eggless lemon, butter scotch and choco vanilla cakes among others. This new range comes with no added preservatives targeting consumers looking for lifestyle products. The whole grain carbohydrates are the best in terms of combining healthy carbs with fiber, antioxidants, essential vitamins and minerals. The ingredients used in these products permit the consumer to achieve epicurean nirvana by satisfying his or her taste buds. These products will be launched in Ludhiana, Chandigarh tricity, and Delhi-NCR.





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How cloud telephony is raising the bar for retail industry

The Retail industry is evolving and adopting technologies at a faster rate than ever. To meet the higher benchmarks set by e-commerce, the sector has turned its back to the conventional ways of executing business processes. Retail stores have realized the power of automation. Of all the technologies that they are adopting, cloud telephony is has emerged as an innovative technology for the retail industry.

By Ankit Jain



Cloud telephony has assisted the retail sector transform the face of its business call management, and on-call customer service. Apart from this, cloud telephony has also helped retail brands keep an eye on their marketing campaigns, agents' performance, orders placed on calls, etc. Let's have a look on how cloud telephony products are resolving the challenges faced by the retail industry.

Whether it is ensuring best customer service during peak hours or providing 24*7 after sales service to the customers, all have been made possible with the help of cloud telephony.

Saves costs, increases profits

Cloud-based PBX system is aiding businesses save costs and earn more profits by eliminating the need of manual call handling. Hence, it saves labour cost incurred from managing calls. In other words, it saves cost of a human receptionist.

Moreover, capital expenditure for maintaining a PBX server is zero. Setting up a cloud-based PBX system does not require any infrastructural cost or one time heavy investment. Businesses just need to pay their monthly subscription charge as they use the services.



Upgrades customer experience

Besides saving costs, retail outlets have upgraded their customer experience with the help of virtual PBX system. IVR distributes calls automatically to the right staff/agent as per callers' requirements. This reduces waiting time of the callers significantly and ensures efficient call management even during peak hours.

Furthermore, a virtual number acts as a centralized contact number of a retail chain irrespective of the multiple geographical locations of its outlets. So, it becomes convenient for the callers to contact a retail store for any kind of queries irrespective of the city or state they are located in.

Efficiently monitors all customer queries

Features like call recording assist retail businesses keep a proper track of on-call orders and customer complaints. Call logs are automatically maintained along with the respective call recordings, and these can be accessed from anywhere, by any user in the company.

If any confusion arises in terms of order placed, call recording is sufficient to re-confirm the order. Bothering customers again to repeat the placed order definitely sets a poor example. In case, any dispute arises between staff and the consumer, call recordings can act as an evidence to arrive at a quick resolution.

Tracks agents' performance

One of the major challenges faced by retail stores is to keep a track of performance of all their agents. Call tracking feature helps retail stores keep a track on each individual agent if he/she is answering calls during the working hours, and number of calls



getting missed by a particular agent. Call recordings are used to monitor how agents are interacting with the customers, and handling their queries. This gives better insights about the best performing agents, and staffs who are lacking behind. Call recordings are also used in training new staff and enhance performance of the existing ones.

Takes marketing one notch up

Cloud telephony has made it easy to track RoI of marketing campaigns. Unique virtual numbers are assigned to each individual ad campaign, and incoming calls on each virtual number are tracked. This lets the retail brand know which advertising campaign is bringing more number of calls and most relevant traffic. Hence, it becomes easy to figure out the best advertising campaign and allocate marketing budget accordingly.

Another feature, remarketing, assists retail brands promote the product to their callers through SMS marketing and facebook advertising. It has, thus, become easy to inform customers about peak season sale, any new product, new features introduced, personalized discount offers and so on.

Whether it is ensuring best customer service during peak hours or providing 24*7 after sales service to the customers, all have been made possible with the help of cloud telephony. Although the advantages that cloud telephony provides to the retail industry aren't limited to these, retail sector is still in the process of reaping its full benefits. Cloud telephony has changed the way retail sector operated and dealt with their customers, and it will be a major weapon to win the war against e-commerce in the years to come. **PG**



Ankit Jain is the founder of VoiceTree Technologies, a cloud telephony company better known for its products MyOperator and CODAC, which offer automated business solutions.






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Planning for Success

New technology helps retailers manage the complexities of farm-to-fork logistics.

By Jenny McTaggart



“
When supermarkets succeed in streamlining their delivery process, logistics costs are kept to a minimum, farmers have a lower return rate, and customers get the freshest food possible.”

— William Salter
Paragon Software Systems

Even in the Digital Age, getting food from a farm to a customer's fork is as relevant as ever — but the task has become far more complicated than many in the industry could have predicted, thanks in large part to logistical challenges that range from unpredictable traffic to ultra-perishable fruit.

The onus is now on retailers and their supply chain partners to come up with smart, cost-effective and dependable solutions to keep them at the front, or at least near the head of, the retailing pack.

So far, one of the logistical front-runners in the race is Amazon, which recently formalized its commitment to gain ground in the grocery business by bidding for the country's largest natural food retailer, Austin, Texas-based Whole Foods Market.

Ironically, it's technology, which Seattle-based Amazon certainly knows a thing or two about, that may be the most coveted tool to sharpen retailers' logistical know-how as they step up their competitive games.

Thomas Gravelle, director of logistics, transportation and customer service for Austin, Minn.-based Hormel Foods, says technology has certainly been a game-changer during his 37 years at the 125-year-old company. “The biggest change I've seen is a more varied item offering, with many more choices and flavors for the consumer,” he notes. “This has made things more challenging for our logistics team members, but we've been able to execute the

logistics functions for food products effectively within the environment of increased complexity, due to greater use of technology.”

Hormel is also relying on smarter partnerships with its retailer partners, he notes, pointing to its participation in backhaul programs as just one example.

Asda's on the Right Route

Of the many types of logistics-related technology to shape the industry, transportation-related solutions such as route optimization software are helping companies better navigate farm-to-fork delivery. According to William Salter, CEO and president of Dallas-based Paragon Software Systems, his company's retail customers, including Asda and Stewart's Shops, are seeing some advantages to using routing and scheduling technology.

Deploying Paragon as a strategic planning tool, Walmart-owned U.K. supermarket chain Asda, based in Leeds, has been able to review and model best routes, which has resulted in better use of its fleet and lower capital expenditures, according to Salter.

“Our software enables precise planning of delivery routes and vehicle use across all of the depots that serve Asda's nationwide stores, which serve more than 18 million customers in store every week,” says Salter. “As a result, food miles and carbon emissions are reduced through improved use of its fleet of tractor units and trailer units.”



→ LOGISTICS OF LOCAL



Locally sourced products are an increasingly big draw for supermarkets, with sales growing from \$5 billion to \$12 billion between 2005 and 2014

and expected to hit \$20 billion by 2019, according to Rockville, Md.-based Packaged Facts. Creating and managing relationships — especially the deliveries — with local producers can be cumbersome and time-consuming. One of the largest departments for local products is the produce department, and stores and distributors are taking several different paths to make offering these products easier.

One method is to use aggregators, or farmers' exchanges. The aggregator serves as a central repository for farmers to sell their produce to, and for stores to buy the produce from. Several stores across the country are turning to such businesses to ensure that they always have the items they need in stock and aren't relying solely on one farmer's crop to supply their stores. "What we're trying to do is to introduce as many opportunities and revenue streams as possible for the farmer and

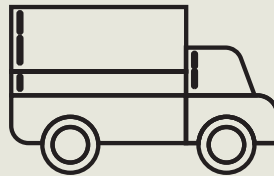
for the store," says Marty Travis, owner of Fairbury, Ill.-based Spence Farm, a food aggregator that supplies Harvest Market, in Champaign, Ill., as well as more than 250 restaurants in Chicago. Harvest Market receives a shipment once a week, and all billing is handled by Spence Farm.

Sourcing and billing are two of the largest pain points for the stores, which is where Forager comes in. The startup, located in Portland, Maine, has built a platform for both sides of the equation: suppliers and grocers. It allows farmers to post what they have for sale, and stores to compare prices, see what's available, place items they want in shopping carts and make purchases. Forager handles all of the billing and payments, which helps reduce time on the grocer's end. Portland Food Co-op, which uses the platform, has seen sales of local products increase 11 percent; overall, the store's local sales have hit 40 percent.

Other stores have turned to hosting farmers' markets to satisfy their customers' need for local products. Macey's, Lin's, Dan's, Dick's Market and Fresh Market in Utah host Eat Fresh, Eat Local farmers' markets in partnership with 26 local

growers. The farmers' market, which runs from July 10 through the beginning of September, is held on Saturday mornings. Farmview, in Madison, Ga., also hosts a farmers' market on Saturdays. Brad Kelly, business development and farm operations manager for Farmview, notes that the store was slightly concerned about possible poaching of sales when it started the farmers' market, as the store itself is focused mainly on sourcing local products. "It's been a draw," he says. "If anything, it brings more traffic to the store." Further, the farmers'-market vendors are typically different from those that supply the store.

No matter how grocers choose to bring local products into the store, there's no question that local is a draw. "Sixty-four percent of consumers will make a special trip to the store if they know their favorite grocer has local produce in season," says David Stone, founder of Forager. "That person going to the store to buy asparagus in asparagus season — they're more likely to put something in the shopping basket besides just that one item. It's incumbent upon the grocer to get as much high-quality local produce on the shelves as possible and promote it to the consumer."



Meanwhile, in the United States, Ballston Spa, N.Y.-based regional convenience store operator Stewart's Shops has adopted Paragon's routing and scheduling software to automate the manual process of planning deliveries to its retail outlets, which should ultimately lower mileage, reduce fuel usage and improve truckload efficiencies, observes Salter.

"With growing demand from consumers for fresh food, the greatest logistics challenge for our grocery customers is ensuring that fresh food is available in store as quickly as possible after leaving the field, with the least amount of handling and at the lowest possible cost," he notes.

"Moving products quickly and efficiently through the supply chain not only ensures that customer demand for fresh food is met, but also increases the length of on-shelf time before use-by and best-before dates expire," he adds. "This helps keep the customer happy, boosts sales and minimizes the amount of food waste or stock returned to producers."

Aside from technology, some of the commonsense solutions adopted by the industry

include using the same container all the way from the point of packing at the farm or producer to the delivery journey and into the supermarket aisles, observes Salter, who adds, "Standardizing containers also allows vehicles to be better utilized, because transportation planners can better understand what will fit in each truck based on accurate volumetric data."

However, the advantages that technology brings to the table are unparalleled, he maintains: "Using a system like Paragon's routing and scheduling software allows transportation planners to manage wide-ranging criteria. This includes restrictions on vehicle types and delivery times, time required for loading and unloading, and preferred delivery times for different types of food."

Salter continues: "When supermarkets succeed in streamlining their delivery process, logistics costs are kept to a minimum, farmers have a lower return rate, and customers get the freshest food possible. It's a win-win for everybody." **PG**





How to make your business click

By **Vijay Singh Sokhi**



It is one thing to launch a business and a different thing to turn it into a successful venture. No wonder that we hear about so many new companies being launched but only a handful of them manage to break out and succeed.

— **Vijay Singh Sokhi**
 Founder and Director,
 SCICO

People always ask me: what is the secret ingredient for success of a business? The answer that I give them is patience. As easy as it may seem, the reality is that patience is a very difficult trait to possess. As someone who has a well-nuanced understanding of the nitty-gritty of doing business, I often come across people who expect me to somehow wave a magical wand and solve all their business related problems and difficulties in a jiffy.

But that's not how things work. Today, the term 'smart work' is much in vogue and become a trend. The next-gen entrepreneur wants to work smart. They want everything at the click of a button. The concept of hard work seems to be going out of fashion. What they don't understand is there is no shortcut to success. You have to work and slog hard to achieve business success and there is no escaping it. When we launch a new business, the path ahead is not only full of challenges but also long and arduous. Only a few manage to successfully negotiate the pitfalls along the way.

It is one thing to launch a business and a different thing to turn it into a successful venture. No wonder that we hear about so many new companies being launched but only a handful of them manage to break out and succeed. I make it a point to speak highly about customer acquisition whenever I consult. Most of the people whom I meet don't understand this. All that they are bothered about is how to generate sales. A new business that is built on just sales is bound to fail. Only those businesses that are built on the pillars of customer demand will survive and flourish. Most new businesses want to build up their sales because they are looking for investors.

Such an approach is clearly misplaced. If I may clear a misconception here, investors have never invested in products or sales. They have always invested in people. If the investor knows that the person who is handling the business has the ability to walk that extra mile and to create success, he will invest even if the plan is incorrect. He will give all the help that is needed to correct the plan.

Building a brand is just like nurturing a baby. Parents need to start taking care of the new-born from the day she is conceived. A lot of investment goes into ensuring that everything works to a plan and the efforts bear good results. A lot of trails and tests have to be run before the launch of any new business. Just like in the case of a baby, the tests are expensive and you cannot be sure of the eventual outcome. The same holds true with any new business. You don't know what will happen but you have to do all that is within your hands to ensure a good outcome. Experts like us can act as a catalyst for your business by helping you to fine-tune processes.

Sharp Consulting and Implementing Company (SCICO) brings to the table something that very few people do – consult and implement. We bring to a business the same love and care that parents bring to their own child. We not only make the business plan for you but also help you implement it. We are trying to bridge the gap between consulting and implementing that has existed for a very long time. SCICO has consulted and implemented plans for several select companies in the past. Currently, we are spearheading the launch of two new businesses. One of them is already in action and the plans are being laid out for the other. **PG**

Vijay Singh Sokhi, Founder and Director SCICO, has worked with several well established brands.

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Total Fat	28.5 gm
Saturated Fat	12.25 gm
Protein	12.25 gm
Carbohydrate	0.2 gm
Dairy Fiber	1.0 gm
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Sugar	0.1 gm
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VENKATESHWAR KUMAR
CEO, Nilgiris

Trailblazer of South India's F&G Retail

Established in 1905, Nilgiris is one of the pioneers of organised retail in India and a heritage brand with a storied legacy of delivering quality customer service. Operating under the banner of Future Group, Nilgiris spawns 215 F&G outlets across Tamil Nadu, Karnataka and Kerala with a total retail area spanning 4.45 lakh sq.ft. The supermarket chain is positioned as a neighborhood store that guarantees assortment, range and freshness. "Nilgiris operates on the foundation of personal connect that translates into quality service and continues to build on its product range in order to respond to its customer's evolving needs," says CEO Venkateshwar Kumar in a chat with Progressive Grocer during which he outlines his plans to propel future growth of Nilgiris by going for a more contemporary look, by building on its existing infrastructure and with the help of more updated technology.

Describe your personal journey as a retailer. How has it translated into the monumental success of Nilgiris' retail operation?

I started my retail journey with the Future Group in 2005 and I operate on the group's core belief that retail is our religion, stores are our temples and customers are no less than God. This philosophy has helped me spearhead Future Group's operations in South India through an aggressive expansion initiative that encompasses all states and population strata in the southern region. While I was heading the large-format hypermarket Big Bazaar in the initial phase of my retail career, I have expanded into Future Group's FBB (fashion format) and supermarket business through the Nilgiris brand over the past few years. While retail is my passion and has been a significant part of my career, I began my professional journey in FMCG after completing my MBA from T.A. Pai Management Institute (Manipal) in 1991. After a 12-year successful stint of working with various national and multinational FMCG and tele-com companies, I ventured into retail. As Head of the South Zone at Future Group, I am now overseeing 70 hypermarkets, 15 FBB stores and more than 200 Nilgiris supermarkets with over 5,000 employees, and am on a single-minded mission to delight millions of customers walking through the aisles of Future Group retail stores.

What are Nilgiris' marked differentiators that set it apart from other F&B retail players?

Nilgiris, a heritage brand that is one of the pioneers in organized retail in India, epitomizes excellence in ethical and professional practices. Established in 1905, this national brand firmly rests on a strong

foundation of core Indian values that translate into quality customer service through personal connect and experience. Nilgiris' loyal customers over the generations have returned to this store solely because of the great quality and freshness that the brand promises and delivers consistently. Its customer-friendly practices that are reflected in its overall operations make Nilgiris a hallmark for retail excellence. The relentless effort to provide our customers with "whatever, whenever" through a catchment-curated assortment is another feather in our cap. We are also proud of our high productive stores and their unstinted commitment to deliver on our service promise.

TECHNOLOGICAL INITIATIVES

- Nilgiris' vision for the future involves its digital strategy of 'Retail 3.0', which envisages a 'store' as a community marketplace where physical retail is layered with technology and hence, gives a connected community experience to our shoppers.
- The emphasis is on data-enabled and real-time decision making, with an objective to provide customers a seamless and infinite aisle, through an assortment in store and out of store. Membership will be core to Nilgiris' Retail 3.0 strategy and product assortment at its stores will not be decided by the retailer but will be especially member-curated.
- Technology will pervade every touch point. Mobile POS at the front-end, app-based multiple delivery convenience, and a unique membership program giving benefits beyond functional discounts, will be the hallmark of Nilgiris.

Nilgiris' loyal customers over the generations have returned to this store solely because of the great quality and freshness that the brand promises and delivers consistently. Its customer-friendly practices that are reflected in its overall operations make Nilgiris a hallmark for retail excellence.



Nilgiris is active on new-age media and is constantly engaging with the youth through spearheading campaigns during World Milk Day, Valentine's Day and other youth centric events. Simultaneously, we are introducing several modern-day products like cold coffee, greek yogurt, flavoured milk, almond shots, etc.

How is Nilgiris positioned in the domain of F&G retail and what is the customer proposition offered?

The customer proposition of the Nilgiris store is reflected in the voice of its customer that says: "I get everything I want every time and I know it will be fresh." Therefore, the supermarket chain is positioned as a neighborhood store which guarantees assortment, range and freshness.

What are the major categories and range of merchandise you specialize in as a retailer?

Nilgiris stores offer a wide range of products to customers ranging from a regional, local and international variety in grocery and food segments. Our customers find a distinct variety of products like powdered flax seeds, ajinomoto, fresh yeast, palm jaggery, hill garlic, aapam mix, ragi dosa mix, frozen foods and many international food products, all under one roof. With new and emerging categories in the food, home and personal care segment, the store continues to build on its product range in order to respond to its customers' evolving needs.

Tell us about the new and emerging categories in your stores. How do you see their market potential growing?

The emerging categories in our stores are predominantly in the ready-to-eat and ready-to-cook segments. Our customers are gradually transiting from slow to instant cooking and we are reaching out with some innovative products, which will be valued immensely for simplifying meal preparations while still being delicious. Millets, dairy beverages, value-added dry fruits and health foods are also showing disproportionate off-take trends off late. Over the past years, we have seen a rise in the awareness and aspirations of customers who are now willing to spend on healthier options and try newer



food products and preparations. For instance, dry fruits is no longer regarded as a luxury snack and has occupied a more meaningful place in a consumer's daily eating habits. A lot of people are now switching to healthier grains and new spices. Nilgiris stores cater to these evolving trends by selling items that now define 'Centre of Plate' for modern India.

What is the typical customer profile of shoppers that frequent your stores?

A quintessential Nilgiris customer is someone who strongly opts for quality, range and freshness over value and discounts. Customers who yearn for a convenient shopping experience with a sense of personal touch return to this store. Shoppers from SEC B, B+ and above shop at Nilgiris stores and belong to all age groups.

While targeting newer markets, which store locations do you prefer and why?

Traditionally, we have looked at catchments and locations with a high affluence index, besides looking into locations like apartments, clubs, offices and high streets. However, our current strategy is to be present in every pin code of south India and also in metro stations. In addition to this, we are training our staff to be more intuitive in their communication with their customers so that they are able to engage with them at an emotional level



A STRONG SUPPLIER BASE

Freshness is a signature trait of Nilgiris and is upheld by a strong network of 5,000 milk farmers. An in-house manufacturing facility for dairy and bakery goods adds to the advantage that it obtains from Future Consumer Limited's state-of-the-art processing facility for staples located at Tumkur. Several small-scale local food manufacturers also form a major part of its supplier base and provide the chain with fresh and high-quality dairy, staples and bakery items.



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Our core strength lies in our home-brands in the dairy, bakery and staples category. The loyalty for our stores has been built through the Nilgiris range of products. While 60% of our business relies on food products, a substantial chunk of more than 40% comes from the Nilgiris brand alone.

and understand what their needs are. This will empower them to serve the store's customers in a more meaningful way.

What interesting concepts or strategies have you incorporated into your business model to especially attract the young generation – the millennial shopper?

We are working towards attracting Millennial customers on multiple fronts. Nilgiris is active on new-age media and is constantly engaging with the youth through spearheading campaigns during World Milk Day, Valentine's Day and other youth centric events. Simultaneously, we are introducing several modern-day products like cold coffee, greek yogurt, flavoured milk, almond shots etc. Our emphasis has been on engaging and attracting the young generation. Our stores are also undergoing a face-lift and will sport a more contemporary look.

Which brands are most popular across various categories?

The best sellers in our stores are our own private label brands, with more than 40% of the sales coming in from Nilgiris and Golden Harvest brands. Our own in-house dairy, staples and bakery categories make for substantial contributors too.

What is your private label strategy? Which categories do you service with your brands?

Our core strength lies in our home-brands in the dairy, bakery and staples category. The loyalty for our stores, over the years, has been built through the Nilgiris range of products. While 60% of our business relies on food products, a substantial chunk of more than 40% comes from the Nilgiris brand alone. Therefore, our strategy continues to revolve around strengthening our own brands. Our recent launches include products like flavoured milk,



→ **FACT BOX**

- Retailer/ Brand Name: Nilgiris
- Launch Year: 1905 with the first store in Ooty. Expansion to other cities began in 1936.
- Parent Company: Future Group
- Company Headquarters: Bangalore
- Key People: Nikunj Biyani (Director, Future Group), Venkateshwar Kumar (CEO South, Future Retail Limited), Manoj Agarwal (CFO), Gopal Menon (VP - Franchisee Operations), Seshadiri (Head Manufacturing), Salitha (Head – HR)
- Retail format of stores: Convenience / Neighbourhood Stores
- Number of stores in operation and where: 215 stores spread across Tamil Nadu, Karnataka and Kerala.
- Average size of stores: 2,300 sq.ft.
- Total retail space under operation: 4.45 lakh sq.ft.
- Operating model - company owned/leased/rented: Franchisee model
- SKU count in stores: 3- 5 SKUs/sq.ft. translating to an average of 7000 to 8000 SKUs per store.
- Employee strength: 300 direct employees; 2,500 indirect employees in front-end franchisee customer interface team





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Distribution Redefined

Stepping beyond the commonly-followed philosophy in modern retail – of 20% SKU contributing to 80% business – Nilgiris believes in fulfilling every need of its customer at all times through its extensive range, variety and ‘whenever, whatever’ attitude.

which come in six unique flavours, cold coffee, butter milk, laasi, Indian cookies and bar cakes. Adding to the existing Nilgiris portfolio, Future Consumer brands like Tasty Treat Namkeens, Poof, Sanghi’s kitchen, Mingles, etc., further strengthen our brand’s own portfolio and cut across every category in the store.

What marketing and promotional activities do you employ in order to connect with your target customers?

The brand’s efforts to ensure better customer engagement focus on creating a human connect with its customers, especially during special occasions, through its own “made, not manufactured” products, unlike the run-of-the-mill product discount strategies used by the regular retailers. The brand’s communication through media channels and advertisements revolves around re-establishing a stronger connect between the community and our high-quality home-brand products. A good example would be our Christmas campaign that reads “A Christmas isn’t Christmas without Nilgiris”. The jingle aptly captured the festive mood while it celebrated the range of delicious Nilgiris cakes. Similarly, for Pongal and Sankranti celebrations, the store sets the right mood to encourage customers to make their seasonal purchases. Its range of dairy and confectionery items take centre stage during campaigns like World Milk Day, Yoga Day, Valentine’s Day, and Women’s Day. In fact, Nilgiris becomes the preferred destination during Diwali and Dussehra season for its food gifting options like

Nilgiris soan papdi, gulab jagoon, Mysore pack, etc. We offer an integrated mix of gifting items on festive occasions and ensure consumer sentiment is catered to and looked after.

Describe the mix-and-match bundling and cross-promotional activities conducted within your stores.

Stepping beyond the commonly-followed philosophy in modern retail – of 20 % SKU contributing to 80% business – Nilgiris believes in fulfilling every need of its customer at all times through its extensive range, variety and ‘whenever, whatever’ attitude. In fact, the emphasis has never been on promotions alone but on delivering quantity and quality. However, cross promotions and certain bundling offers are run across stores during special occasions and festivities to promote gift-hampers and new products from categories like dairy, bakery and staples. The sincerest testimonial for the brand’s efforts is when shoppers, while leaving the store after shopping, announce: “We’ve got everything we wanted!” That is of greatest satisfaction.

How do you utilize product demonstration and sampling tools to showcase your product ranges across different categories?

Sampling and demo initiatives are great differentiating tools that allow us to create better customer engagement in our stores and build long-term credibility and loyalty too. Our stores follow a rigorous sampling calendar helping shoppers discover new products and food trends. Our sampling involves wet as well as dry sampling, depending upon infrastructure at stores.

However, creative efforts beyond direct sampling and tasting are concurrently made in order to reach out to a much bigger customer group. Cross bundling across categories is a powerful way of earning the customer’s attention, where items like wafer-biscuits and snacking items, etc. can be given off as a freebee or a ‘trial pack’ with another snacking item. We also rely on our extensive membership database to reach out to target customers with the right offers, samples and freebies.

What initiatives have been adopted to strengthen your supply chain – back-end and front-end?

Building on our existing infrastructure and updated technology, new distribution centres have been planned in Kochi, Hubli, Salem, Trichy and across south India to strengthen our replenishment process across the country. **PG**



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Increased investments in India's dairy sector is driving competition

Dairy is witnessing consistent growth in the consumption of value-added products such as flavoured milk drinks, lassi, curd and yoghurt. The Indian dairy market, though dominated by cooperatives, is also witnessing increased interest from financial institutions as an investment destination. Progressive Grocer spoke to Prashant Roy, Senior Research Analyst – Food & Nutrition at Euromonitor International and Dilip Radhakrishna, Research Analyst – Food & Nutrition at Euromonitor International about the trends and developments influencing the dairy industry in India and prospects ahead for its different product segments.

Give us a sense of the broad segmentation of the dairy market in India – the size of the market overall and the volume and value share of the products in India's dairy market? How is the market size of the dairy category growing in India in recent years?

Euromonitor International's dairy coverage includes retail sales of packaged drinking milk products, butter, cheese, yoghurt and sour milk and other dairy products. As an exception, unpackaged hard cheese, such as Cheddar, Edam, Parmesan and Gouda, is also taken under consideration. We have also included soft cheese (paneer) in our coverage. However, the majority of cottage cheese produced is sold in unpackaged format.

The Indian dairy market recorded a 16% year-on-year value growth, through 2013-17, in line with the growth of fresh milk. Besides the shift from unpackaged to packaged, increasing health consciousness and awareness is driving growth. Consumers are increasingly shifting from carbonated drinks or drinks with high amount of sugar content, towards healthier alternatives such as milk.

To cater to these shifting consumers' preferences, the manufacturers have expanded their range of value-added dairy products, such as flavoured milk drinks, lassi and yoghurt, which are a better and healthier alternative to the traditionally available carbonated and sugary drinks.

Value-added milk products such as flavoured milk drinks, buttermilk, lassi, yoghurt and curd have also witnessed a huge spike in demand during summer season in the country. As a result, the industry is expected to witness a high growth momentum soon, primarily guided by improved distribution capabilities and operational efficiencies, which will ensure the availability of milk and milk-based products catering to the rising consumption pattern across the country.

How do you look at the outlook and prospects ahead for the category – which product segments will gain more of market traction?

Even though milk is a mature category, yet the prospects look extremely promising in the future. Dairy is witnessing consistent growth in the consumption of value-added products, such as, flavoured milk drinks, lassi, curd and yoghurt, which offer better alternatives as compared to carbonated beverages, because of rising health awareness.

Even the central and the state governments are supporting consumption by promoting initiatives such as the Mudra scheme, which offers soft loans to dairy farmers to increase milk production or making consumption of fresh milk mandatory under midday meals schemes in government schools.



What are the new trends and developments within the category?

The major trends for the category are:

Increased health awareness: The modern consumer is very aware about their health and is reducing dependence on the traditional carbonated drinks and migrating to healthier alternatives. As a result, Pepsico Inc. and Coca-Cola India Pvt Ltd, have witnessed considerable headwinds in carbonated beverages and are experimenting with new products, such as sugar-free drinks or non-aerated beverages to drive their organic growth and maintain their footprint in the Indian market.

In fact, products such as cow ghee and cheese are perceived to have significant health benefits over other cooking fats, such as Vanaspati or ghee. Consumers are increasing purchasing such products and which is contributing to growth.

Healthy Living: Healthy living is gaining precedence among consumers, and the demand for health and wellness dairy products is constantly on the rise. Other than the growth in milk and milk products consumption, even the growth of fortified milk products has been looking promising.

The Food Safety and Standards Authority of India's (FSSAI) made it mandatory for milk producers to add more vitamin A and D to packaged milk products, and even private players, such as Nestle SA, have already started implementing the suggestions.

According to Gujarat Cooperative Milk Marketing Federation, with the rising per capita consumption of milk at 360 grams per person per day in 2018, up from 110 grams in the late 1970s, and expected to touch 800 grams in a few decades, these initiatives will ensure that the nation is able to decrease the population of malnourished in the country.

Dairy is attracting increased investments:

The Indian dairy market, though dominated by cooperatives, is also witnessing increased interest from financial institutions as an investment destination. For instance, KKR India, local arm of the New York-based buyout entity KKR & Co. Inc., had invested INR6000 million in Kwality Ltd., a major producer of dairy products with the 'Kwality' brand. The Lactalis Group of France, had invested INR 1,7500 million and INR 4,700 million in Tirumala Milk Products Pvt Ltd and Anik Industries Ltd., respectively. Cargill Ventures also invested INR1,100 million in Dodla Dairy Limited.

These investments are driving some competition in the Indian market, promoting private sector players and co-operatives to revamp their strategy, and invest in brand building, expansion, direct procurement and distribution. As a result, Heritage Foods Limited spent approx. INR 750 million in brand building exercise, while Gujarat Cooperative Milk Marketing Federation, producer of the Amul brand of dairy products, have plans to invest INR 30,000 million by 2020. Parag Milk Foods Ltd. and Prabhat Dairy Limited have invested INR640 million and INR400 million on strengthening their industry presence.



The Indian dairy market recorded a 16% year-on-year value growth through 2013-17, in line with the growth of fresh milk. Besides the shift from unpackaged to packaged, increasing health consciousness and awareness is driving growth.

— Prashant Roy
Senior Research Analyst – Food & Nutrition, Euromonitor International





With the increased adoption of western foods both in foodservice as well as in day to day cooking at home, the demand for international and non-conventional cheese varieties has grown.

— Dilip Radhakrishna
Research Analyst – Food & Nutrition, Euromonitor International

Furthermore, Gujarat Cooperative Milk Marketing Federation recently announced plans to expand its footprint to through the franchisee model, whereby, it would lease out its brand name to individuals and small businesses, against a small fee. This would further enable them to achieve sales as the small initial investment (approx. half a million in local currency) and store space remains very small.

Premiumisation: This is another major trend as consumers are increasingly demanding products having high quality ingredients, exotic flavours and sold in innovative packaging.

The market has witnessed growth in butter in different flavours, such as garlic flavoured butter and choco butter spread, which are priced higher than the normal butter. Premium international brands, such as President, are also launching different variants of butter, such as unsalted and butter with crush garlic, to expand their footprint in the Indian market. These are priced slightly higher than the usual butter available in the Indian market.

The market is also witnessing demand for premium variety of cheese, such as mozzarella, emmental, and leerdammer.

How is the category growing in terms of assortment, new products?

With the increased adoption of western foods both in foodservice as well as in day to day cooking at home, the demand for international and non-conventional cheese varieties has grown. According to Euromonitor International, spreadable processed cheese, has been growing at 24% year-on-year in value terms 2013-17.

The market has been witnessing new product launches in cheese. For instance, Parag Milk Foods Ltd. launched ‘Go Cheese Cubes’, with zero preservatives and high calcium and milk protein content in 2018. In the last quarter of 2017, even



Prabhat Dairy Limited announced plans to launch new cheese and soft cheese products.

What’s exciting is the increased availability of flavoured cheese such as pepper flavoured packaged cheese. The Indian market is witnessing demand for artisanal cheese. There are several cheese farms spread across India, which manufacture European artisanal flavours, such as Montasio, Edam, Feta, two kinds of Gouda, plain and pepper and a Camembert-style cheese for local consumers.

Non-dairy cheese varieties are catching up too. For instance, Violife, a Greece based cheese manufacturer, launched vegan cheese in India in 2018. Sold in different variants, these are indistinguishable from their dairy counterparts, and highlights Indian consumers’ intent to transition to healthy food habits, i.e, moving away from meat-based food habits.

What is the contribution of the category to overall sales and to the processed food section; Is the shelf space for the category increasing over the years?

The contribution of cheese to the overall dairy category is very low. It is primarily dominated by soft cheese (paneer) with the major consumer being the unorganised sector, where freshly made paneer is prepared every day and sold in unpackaged format.

While cheese contributed almost 3% to the overall packaged food retail sales, the growth potential is promising for this category in India.

The increased use of cheese in consumer foodservice is also expected to contribute to increased sales of cheese. Cheese remains an important ingredient in American, Italian, European fast food and foodservice in India. According to



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Cream, coffee whiteners are some of the categories which are quite unexplored products in India. Coffee whiteners and cream are majorly used in institutions, hotels, restaurants and cafeterias while the retail consumption is very negligible.

Euromonitor International the Pizza and Burger fast food value sales in 2017 itself grew by 24% and 12% respectively.

Expansion of foodservice outlets, such as Dominos, Pizza Hut, McDonalds and Taco Bell, will further drive the consumption of cheese in India, as cheese forms a key component of their food menu.

Cheese is also increasingly capturing shelf space and enhancing its visibility. Modern retailers, along with super and hyper markets, tend to have huge shelf space for cheese. Cheese varieties attract attention of consumers looking to make international food varieties at home. Independent grocers and retailers (kirana stores) do sell cheese in smaller packs, or slices, which are comparatively cheaper than the premium cheese variety. Premium and artisanal cheese is only available in selected super and hyper markets and in gourmet stores. Right distribution channel remains key to expanding the product reach of cheese.

Which are the brands that are gaining ground in dairy segment and the reasons thereof?

Amul brand, owned by Gujarat Co-operative Milk Marketing Federation Ltd will continue to lead the overall dairy market. With best supply chain the company ensure steady supply to distributors and has maintained a strong foot hold in the market through its single brand strategy. Amul has also been involved in product innovation and has launched more than 50 new products in the last four years. The company is aggressively expanding its milk processing capacity over 2011-2017 and has a target to achieve 20% CAGR growth over 2018-2022.

Mother Dairy brand from National Dairy Development Board grew by 18% during 2018 in the dairy business. The company embarked on extensive exercise to redefine its brands into three basic segments Healthy Basics, Health Plus and User Driven Segments. The strategic business unit positioned the brand high in the consumer's consideration and making the brand more noticeable.

Which new niches can offer fresh opportunities for the manufacturers?

Margarine with a low base of sales will continue to



maintain double digit growth rate in the future. Since, it is considered to be a cheaper alternative to butter, the demand for the product primarily comes from small, roadside, eateries and other small-to-medium sized restaurants. Vanaspati which is a famous Indian margarine is quite popular in the Indian households for making sweets.

Cream, coffee whiteners are some of the categories which are quite unexplored products in India. Coffee whiteners and cream are majorly used in institutions, hotels, restaurants and cafeterias while the retail consumption is very negligible. Since, India has abundance of milk these products have low demand. However, coffee whiteners are immensely used in mid-day meal programs in schools and to make traditional Indian sweets.

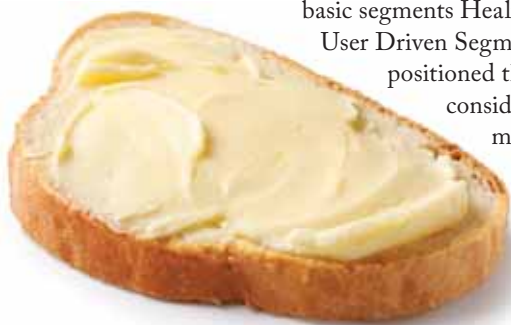
Which are the areas that brands should focus on for their own and category growth?

Some of the area they can focus on are:

Health and wellness: Brands should focus on addressing the specific needs of consumers by launching more of health and wellness products. For example, low fat milk and low-fat cheese should not only suffice the need of consumption but should also be beneficial to health. Maintaining the balance between indulgence and healthy is of prime importance for the future growth dairy.

Right product positioning: Brands should focus on marketing their products to the right audience. For example, launching specific flavoured milk targeting the kids and adults will give good brand exposure. Spoon-able yoghurts as desserts for kids and drinking yoghurt with low calories for health-conscious consumers will be an effective product positioning.

Pack sizes: Products such as cheese and yoghurt are priced high, and many price conscious consumers often want to try before they buy. Hence, smaller pack sizes with low price points would be ideal for trial. Britannia Industries Ltd, Milky Mist Dairy Ltd and many companies have cheese slices sold at INR 66 for a pack size of 100 gm are very popular in India as trial packs. **PG**



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How to innovate to make your brand a big hit

Consumers are eager for innovation when it comes to packaged goods and are interested in trying new food products at the grocery store. This shows immense opportunity for manufacturers and retailers to offer consumers something fresh. Innovation and new products spark excitement in the consumer and generate more opportunities for buying regardless of the shopping channel or medium. New products are the lifeblood of retailing – they infuse verve into existing lines, create completely new categories, and fulfill unmet needs not previously on consumers’ or retailers’ radar. It is not surprising that brands today are continuously looking to the wider food and drinks market to spot trends early on and promote continuous development of more experiential, convenient and innovative product propositions.

By **Sanjay Kumar**



The food and beverage industry in India is currently on the verge of momentous trends that are both transformative and disruptive. The most pronounced of these trends is buoyant growth of the consumer packaged goods (CPG) industry over the past quarter century, which has been nothing short of exhilarating. Riding on the crest of success, CPG companies have launched innovative products to meet an ever-growing array of consumer needs and desires.

While product launches have been taking place at a fast clip, companies have also had to constantly innovate to differentiate their products from others. Indeed, innovation is key when it comes to addressing the challenges in the F&B sector. These include having to cope with rapidly changing consumer needs, shortened product life cycles, margin pressures, and rising technological advancements. Innovation-led new product development, thus, plays an important role and acts as a growth driver for the industry.



Innovation is viewed as the application of better solutions that meet new requirements, unarticulated needs of consumers, or existing market needs. This is accomplished through better products, processes, services, technologies, or business models that are readily available to markets, governments and society. Innovation is a wide concept which aside from creating, launching and marketing new products also includes improving shopping processes, providing consumers with a range of tools to purchase products and ensuring that the entire organization is focused on the singular goal of improving the customer's overall experience. As Indian consumers become more global in their aspirations and desires, as they travel abroad and are exposed to global products, their appetite to consume products in their home market will only increase.

Newer players are faster on food innovations

As the consumption of processed food in India is on an upswing, the demand for healthy, safe, hygienic and convenience driven food is slated to increase at an even more significant pace in the future. Thus, food and beverage offerings that are healthy, value added, safe and hygienic and provide value for money, are the order of the day. A large number of companies are coming up with offerings in the healthy snacking category, including roasted makhanas in numerous flavors, dry fruits/nuts with a twist, vacuum fried vegetable based snacks (palak, okra, kale snacks), freeze-dried fruits, smoothies, juices, certified organic ingredients-based snacks, indigenous ingredient-based products, millet based cookies/snacks and traditional Indian flavor-based candies.

To cope with the whirligig of change in the food industry, manufacturers and retailers are adapting to emerging consumer trends to stay relevant and afloat in times of widespread disruption of conventional business models. In particular, larger and more

established companies find themselves encumbered by less agile innovation processes as they struggle to launch winning innovations. This is evidenced from their growth contribution to the category, which has been systematically waning in recent years.

Category growth, which occurs when game-changing products attract new buyers to the category or prompt current buyers to accept higher pricing, is a strong indicator of innovation success – and major manufacturers are only driving a small portion of it, according to various market reports. A Nielsen study finds that the top 25 food and beverage companies are able to generate only 3-5% of total category growth, despite accounting for 45% of category sales. In other words, despite maintaining an enormous piece of the pie, these large manufacturers can only take credit for a minuscule share in sales from new growth.

In contrast, hordes of new players and start-ups are joining the fray and upending the game of innovation with new ideas and propositions in



The aspiration levels of customers are going through an upward evolution. Customers are becoming aware of themselves, of what they consume and the impact of the products they buy on their health and the world. This is changing the way they look at their lives and what they consume.

— Rajeev Krishnan
MD and CEO, SPAR
Hypermarkets



What Makes New Products Succeed?

New product innovation is exciting; it breathes new life into existing categories, sometimes creates entirely new categories, and drives the industry forward by uncovering and then fulfilling unmet consumer needs. However, the harsh reality is that literally thousands of new product launches fail within their first year, and those failures cost manufacturers very dearly. But it's not all doom and gloom overall. There is a good number of new products that break through the industry noise and category clutter to win a place in our shopping carts and daily lives. What makes those products winners in segments that seemingly become more and more difficult every day?

That success has little to do with luck or genius, and basic truths are consistent regardless of

geography. In every region, there are fundamental components to the DNA of successful product launches.

Disruption Rules

Consumers respond positively when companies offer them new products that solve their problems, meet their needs, end trade-offs and do important jobs. Within the teams that get it right, four common principles are identified in each success story:

- Demand-driven insights
- Rigorous, collaborative development
- Getting the activation right
- Top-to-bottom support within the organization

Demand-driven Insights: It doesn't matter whether the brand is small or large, local or multinational; the category can even be in decline. In India, the biggest success stories in recent years have come from batteries, milk and personal hygiene products – all mainstay categories. That said, minor refinements to existing brands aren't good enough. The innovation is in delivering a new value proposition to the market, even if the product category has been around forever. The best products tend to overcome specific instances of struggle in consumers' lives. That category disruption is a clear sign of a winning solution.

Rigorous Pre-launch Evaluation: Companies need to insist that weak innovations fail before huge sums of monies and brand capital are spent on a large-scale product launch. The product has to have clear differentiation, market relevance and superior qualities to break through the commodity or novelty phase, and that requires a keen insistence on consumer testing and product adjustments. The

4 Principles of Innovation

Despite all the brouhaha around innovation, it comes as a surprise that CPG companies have accepted incredibly high innovation failure rates as the norm. However, what is less obvious is that this mindset sets off a chain of reactionary behavior that actually helps to perpetuate the problem.

Because innovation typically yields low returns, companies have adopted behaviors designed to mitigate the risk of innovation failure. Instead of

launching bold, category-disrupting innovations, they launch a lot of play-it-safe, 'me too' innovations. They use consumer insights as a way to prevent bad innovations from launching rather than as a way to explore ideas and make them better. This behavior only succeeds at mitigating growth, which fuels the perception that innovation is risky.

In fact, 70% of the respondents in a recent Nielsen client survey said their company is more interested in mitigating risks when it comes to launching new products than finding a breakthrough innovation. To increase innovation success rates and achieve more growth, companies have to fundamentally transform the way they innovate by focusing on four key



same holds true in every market across the globe; this developmental rigor helps marketers better understand a product’s potential for sustained consumer demand during the transition from trial to adoption.

Rigorous collaborative product conception increases the development speed by exploring all possible product permutations to pinpoint the product that would perform best in the market.

Collaborate, Create – Activate: The most successful companies are known to throw out the old activation strategy rules and take a blank-slate approach. One trend in particular among successful launches is very early collaboration between manufacturers and retailers. Collaboration accelerates time-to-market, because all functions get aligned earlier.

There’s no substitute for creative marketing campaigns with the right balance of originality and brand truth. The activation strategy has to be right the first time. To make good creatives, marketers need comprehensive consumer insights to guide the way: what they currently buy and why, where they buy, what media they’re consuming. In addition, understanding the underlying needs and demographics or socioeconomic trends is critical. Without those third-party insights, the investments



made in getting the product right are lost because the market approach for creative and advertising fail.

Top-to-bottom Support: Everyone’s on Board:

Distraction is one of the greatest threats to breakthrough success. Throughout the case histories of the most successful launches from all over the world, executives emphasize that a cornerstone of the initiative is organizational togetherness and disciplined team effort. This focus yields breakthrough products with significantly faster cycle times and lower cost.

In India, Maggi Nutri-licious Pazzta Tomato Twist was conceptualized on the belief that there was potential to create a new category by introducing a pasta offering that was superior, nutritious, tasty and easy to prepare. Company insights pointed toward teenagers as the optimal primary consumer for the product. Everyone, from marketing to the team at Nestlé’s R&D Center in Germany, agreed on the strategy. Because of that universal alignment, a new product category was created for the region, and the company enjoyed sustained revenue growth from the product quarter after quarter.

Success isn’t a fluke. The numbers don’t lie. When St. Louis-based Anheuser-Busch introduced Bud Light Lime-A-Ritas to the market, it was a true category expansion and a case study in revenue growth. Bud Light Lime-A-Ritas sold more than \$500 million in two years, and more than 70 per cent of the revenue generated came from new consumers – mostly women.

Each of the previously mentioned strategies was embedded in the DNA of the most successful product launches of the past five years. Marketers who act on all four principles have a much higher rate of success on their innovation journeys.

Early collaboration between manufacturers and retailers accelerates time-to-market, because all vital functions get aligned early on in the entire process.

principles. First, instead of fitting their innovation processes to their current technical capabilities, they have to prioritize by solving real consumer struggles. This seems simple enough, but 75% of concepts tested by Nielsen don’t fundamentally address any relevant need for consumers.

Second, companies need to shift their mindset around consumer analytics; this information should be used primarily for maximizing growth, not mitigating risk. In the old days, you did a concept test to get a green light on development and to prevent bad ideas from launching. However, Silicon Valley has taught us a new way of doing things where we start from a hypothesis and, through rapid

prototyping and testing, build to a whole idea that’s the strongest it can be.

Third, companies need to create an innovation process to fit the innovation, not vice versa. This means accepting that some innovations are designed only to sustain growth—and some are designed to break through—and they both need to be managed differently. Finally, companies need to treat in-market execution as a priority rather than an afterthought. Data from Nielsen shows that brands that spend 94% of their year one ad spend in year two as well continue to grow in their second year. Comparatively, brands that only spend 21% of their year one ad spend in year two tend to decline.





“It’s all about having an appetite for risk; if you don’t have that appetite, I think you will keep struggling as far as innovation is concerned.”

— Hari Menon
 Founder & CEO,
 Bigbasket

the food domain. It is easy to see the buzz and excitement in the food start-up space. For starters, the big fast-moving consumer goods companies are expanding to reach out to rural markets. As they go in for economies of scale, the consumers at the top of the pyramid are not being addressed. This top-of-the-pyramid consumer is more attuned to spending on processed food. Sensing this gap in the market, start-ups are throwing their hats in the ring.

Take the case of Nascens Enterprises Private Limited, which operates baby food brand Happa Foods. Just a year underway in its journey as a baby food maker, the brand has set out to be a game-changer in the baby foods industry by offering organic fruits and veggies blends as healthier alternatives for every stage of a child’s dietary plan. “The baby food industry in India is dominated by milk and grain-based products with very few options emphasizing on the need to include regular fruit and vegetable intake in babies. Our focus, on the other hand, is on a range of fruit and veggie blends that are easy to consume and carry and need no preparation time. We differentiate our products on two levels: Good for your baby products comprising of all organic fruit and vegetable purees, which are free of pesticides and other toxins in a blend that aids in the age specific growth of babies and Good for the planet products, which are ethically sourced and do



foods section, on snacks shelves or in the sauces area. Customers are now more aware about global cuisines and are gradually moving towards global palates. Companies need to continue to keep up with the trends in terms of flavors and product range as supermarkets today stock a gamut of products in each category, including the ones with global themes.

However, health seems to be the biggest trend globally and is getting big in India as well. New entrants and start-ups are riding this trend as well. It resonates with consumers looking for food that is healthy, organic, low calorie and preservative-free. Consumers need to be sure that what they’re eating is good for them. They should trust the brand that they bring home. This is the kind of requirement that food companies need to meet.

Brands and retailers that can understand and navigate these trends will be able to secure a vantage perch and reap the benefits of the highly attractive and fast growing Indian food market in the longer run. “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 the impact of the products they buy on their health and the world. This is changing the way they look at their lives and what they consume,” says **Rajeev Krishnan, Managing Director and CEO, SPAR Hypermarkets.**

The evolving needs and preferences of consumers and their growing aspirations have set in motion a deluge of new product launches, new food concepts, trends in convenience and customer personalization and a growing awareness of the health & wellness range – organic, fresh and natural products. Brands, retailers and marketers need to regularly review all



not generate industrial waste. Our products have no preservatives, additives, chemicals, salt and sugar. We have made our packaging ‘on-the-go’, so active parents at a daycare, on an airplane or at a wedding venue, don’t have to compromise on nutrition for their child,” says **Pankaj Prakash, Founder & CEO, Nascens Enterprises Pvt. Ltd.**

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The baby food industry in India is dominated by milk and grain-based products. Our focus, on the other hand, is on a range of fruits and veggies blends that are easy to consume and carry and need no preparation time.

— Pankaj Prakash
 Founder & CEO, Nascens
 Enterprises Pvt Ltd

their categories to look for new and fun areas to expand into, innovative ideas to recreate what they already have and, of course, maintain high standards in what does well in a dynamic marketplace.

Health & wellness, convenience, lifestyle, food formats, home, millennial and fresh are all the areas that producers and retailers need to look into to bring differentiation within. Food operators need to move fast to ride on the strong demand for natural, clean label ingredients. Consumers globally and in India are demanding products that have ingredients which they can understand. They are skeptical of ingredients that sound like they are manufactured in a plant with no basis of natural origin. In India, consumers are increasingly looking at ingredient panels to make informed choices. “Consumers are actually starting to focus on health-related products, reading labels and spending a lot of time on product images,” notes Hari Menon, Founder & CEO, Bigbasket.

Building trust in products through their functional benefits

Ingredients with positive, functional benefits are more desirable: Consumers are selecting products that have functional benefits. This is amply demonstrated by the rise of value-added dairy, protein mixes, cold pressed juices and products with perceived holistic ingredients like aloe vera, turmeric, ashwagandha and several ayurvedic ingredients. In short, consumers are looking for higher protein, low fat, low calorie and benefits like antioxidants, vitamins, etc. Food and beverage marketers need to think beyond product innovation and look at how they will market products that offer new potential benefits and help to boost consumer perceptions around food and beverage products that contain specific vitamins. As of now, these trends are certainly more prevalent in SEC A and B but the buying tendency, sooner or later, will percolate down to all consumer segments eventually.

What is also obvious is that recent scientific breakthroughs about the potential of vitamins to prevent and alleviate serious health conditions can open doors to innovation for food and beverage

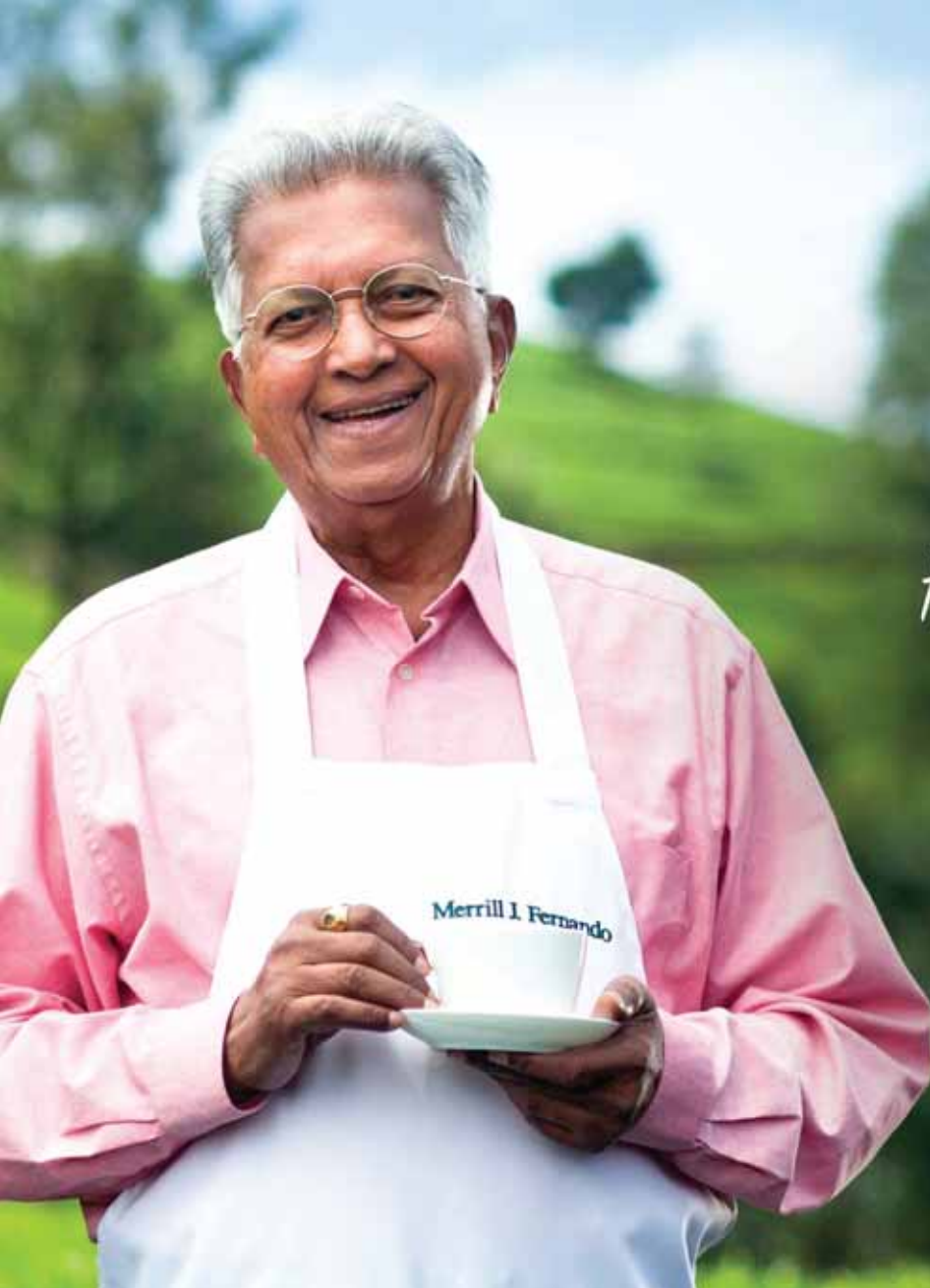


companies. For example, while consumers may traditionally link vitamin D to bone health, there is mounting evidence that vitamin D may have a positive impact on a wide range of health issues, including heart disease, cancer and diabetes, to name a few. It is, therefore, imperative for food and beverage marketers to stay on top of the latest breakthroughs in health and wellness in the scientific community, and then find ways to translate these breakthroughs into viable innovation and communication platforms.

What manufacturers and retailers should seek to address are the issues around consumer education, reasons to believe in the functional benefits of the product in question and preservation of the fundamental attributes of taste and convenience. There’s also the issue of how the competitive set for products with added vitamins and nutrients will evolve over time. Will such products continue to compete with other products in the category, as they do today, but with the added proof of delivery of enhanced health benefits? Or will there come a point when health benefits become the key driver of choice, and the product itself is just a carrier for these benefits? In the latter case, we can expect to see products with added vitamins become substitutes for each other over time, even when the products are from different categories.

Market analysts believe that there are opportunities to market different nutrients and supplements to different consumer segments. For





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example, the perceived importance of vitamins and protein in one's diet decreases with age; on the contrary, the perceived importance of Omega-3 and antioxidants increases with age. Differences between countries exist as well. Protein is more important to consumers in China, India, Japan, South Korea and Turkey than to consumers in other countries. Minerals like calcium, potassium, zinc, and iron are more important to consumers in Argentina, Hungary, Poland, Russia and Saudi Arabia than to their global counterparts. It is therefore important for companies to look at demographic segments when innovating in the area of functional foods. Consumers have different needs based on their life stage, culture and environment as well as the nutritional products currently available to them.



The package, the noise, the availability are not going to be key drivers for consumers to take the decisions. The key driver is going to be the authenticity and personalization of the product itself.

— Jamshed Daboo
MD, Trent Hypermarkets

Innovating to meet the challenge of demographic diversity

India's diversity is very well-known and the food habits of its people vary from region to region. For this reason, it is very interesting to see how the food and beverage sector will take on these distinct challenges. To meet the challenges arising out of differing tastes, needs and other preferences cutting across the demographic diversity, companies should embrace smart innovation and customize products for younger consumers. This approach can help suppliers and retailers to cater to the evolving taste buds. At the same time, it's also important that the food industry innovate on the foods that were there in the olden days and make them palatable for the consumers of today by using technology. For instance, turmeric can be used as a medicine as well as food. Depending on how to use it, the product can become food or medicine. What should be understood is that the more we delve into what solutions we have to offer to the food industry, we will be able to find the solutions to a lot of challenges. An important consideration for food companies is that they must innovate without disrupting how consumers think about food and meals.

Today, consumers are looking for authenticity – they want to ensure that their extra virgin olive oil is from Greece or the balsamic vinegar from Modena in Italy. In food, it is all about the place of origin, how it is grown and processed to give you the real experience. Although it is a small trend in India right now, it



looks like it will gain momentum and become a big opportunity in the future. “Consumers want the affordability, abundance and access of the existing system, but they also want authenticity; food that has been the fruit of labor, and that ties into the culinary traditions of the past as well as offering new ideas,” writes Teresa Novellino in the New York Business Journal. Food is such an important part of culture and social interactions that straying too far from the traditional can be overly disruptive and inhibit consumer adoption of products and services. Players who want to be successful with their new products need to tackle this challenge by creating a balance between innovation and tradition. Many companies have come up with interesting brands and positioning strategies, and are trying to revive the old traditions of India in a new format, packaging and taste, which the younger generation appreciates.

One of the key ingredients necessary for achieving the strategic goals of a company and, more so, for the food sector, is to have a beaver-like focus on product innovation. As new lifestyles, higher incomes and consumer awareness create consumer demand for a year-round supply of high quality, diverse and innovative food products, food players have no choice but to press the pedal harder on innovation. That could help companies achieve sustainable growth and profitability. So, companies that align innovation initiatives with changing consumer preferences and demands and deliver effectively on innovation initiatives – be it high-quality ingredients, innovative packaging, flavor, etc. – will get the right products to the market with speed, be able to tap new markets, increase sales and establish a significant competitive differentiation.

Jamshed Daboo, MD, Trent Hypermarkets, foresees a paradigm shift in the determinants of food habits and consumption decisions. He says that





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There are a lot of Indian products that we can take abroad and sell in large profitable markets. The challenge is to innovate in the lab to create a balance between taste and health. We need to find answers to the challenging question of ‘how to innovate.’

— Piruz Khambatta
CMD, Rasna

the 20th century and the early part of 21st century food habits and decisions have been driven largely by the strengths of distribution and advertising, which the packaged food industry leveraged to increase consumption and penetration. “The package, the noise, the availability are not going to be key drivers for consumers to take decisions. The key driver is going to be the authenticity and personalization of the product itself,” believes Daboo. “Today, with the penetration of Modern Trade and, more importantly, with the penetration of online retail, the access paradigm that earlier was driven by the clout of distribution is going to change. And once big segments of consumers start gaining access to products, the nature of products now available to them will not be driven by accessibility but by authenticity,” adds Daboo while drawing attention to the rapid changes happening in the consumer landscape and how in the next ten years the brand-product landscape of the country will undergo a sea change.

There is also a need for a new breed of Indian entrepreneurs that is willing to push the boundaries to innovate on Indian food so as to make a huge impact on our palates or in order to launch products abroad. “For a long time now, we have been taking samples from abroad and making them in India. That has to stop. I believe there are a lot of Indian products that we can take abroad and sell it large profitable markets. The challenge is to innovate in the lab with that product to create a balance between taste and health and for that we need to attract the best brains and brightest youngsters into the business to find answers to the challenging question of ‘how to innovate’”, says Piruz Khambatta, CMD, Rasna. He adds that finding uniquely Indian solutions to



the challenges of flavor and texture can unlock latent growth in the market.

How do we stack up on the innovation challenge?

Fortunately, the food industry in India is rising to take on the innovation challenge, spurred on by not only the big and established players but also by several new entrants and start-ups. Their new innovations are already beginning to disrupt the industry and are helping to serve the aspirations of the millennials, which have an increasingly different outlook on consumption than the previous generations. Millennials place increased focus on consuming less junk and demand healthful foods that are also appetizing. Companies are increasingly engaged in devising a host of ways to cater to their demand. These trends are presenting enormous opportunities for food and beverage companies to leverage their prowess in product innovation and surmount the challenge of ever intensifying competition in the sector. Take the case of plant-based meat alternatives like those introduced by quite a few companies in recent years. Plant-based protein like pea, lentils and cricket flours (yes) are addressing the demand for clean label and health-conscious foods. Interestingly, quite a few large companies have decided to go for bolt-on acquisitions or equity stakes to access not only the success but also the entrepreneurial culture of innovative and niche companies.

Product development focused on promoting natural ingredients and formulations; innovation to localize the products’ taste profiles with the aim of winning over urban Indian consumers by embracing ayurvedic ingredients; innovating on traditional juices to tap into the expanding consumers’ preferences for more of juice drinks over fizzy drinks are some of the innovations that manufacturers are already experimenting with. Understanding the importance of technology, brands have decided to use it extensively to offer insights into the medicinal



properties of products and to provide curated content and consultation as well as sell the products on the website. “It’s all about having an appetite for risk; if you don’t have that appetite, I think you will keep struggling as far as innovation is concerned,” opines Menon of Bigbasket.

As a highly attractive emerging market in the throes of major changes, brands and retailers today are more than willing to adapt and react to the changes on the ground. Adaptation requires not only an innovative approach to both products and the business model but also a radical transformation in marketing. It requires partnering with suppliers and customers who invest in sustainability, regulator and consumer listening, as well as understanding trends before they become trends in order to capitalize on them better than their competitors.

“I think the decade in focus will be marked by how food is farmed, created, marketed and consumed to bring a fresh perspective and help food industries capitalize on the seismic market changes to better serve today’s discerning customer,” observes **Sadashiv Nayak, CEO, Future Retail**. His words find ready acceptance with manufacturers and



retailers who agree that new brands and products are key components of the growth strategy. The need of the hour is to keep their focus on developing new partnerships at micro and macro levels and sourcing locally and regionally besides finding new ways that can help redefine the customer experience. One must innovate before it becomes a necessity. **PG**



“
The decade in focus will be marked by how food is farmed, created, marketed and consumed in order to bring a fresh perspective.

— **Sadashiv Nayak**
CEO, Future Retail

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BREAKING THE MOLD: WITH FORCE & FANFARE



Businesses today are all primed for an uphill battle for consumer attention. Consumer packaged goods companies want to generate ideas in the areas of new products, packaging innovation, product line extensions, environmental sustainability, business processes and marketing, and are also interested in new technologies connected with sodium reduction, vegetable nutrition and healthier fats and oils. We bring you some successful stories of innovation rooted in a compelling value proposition of brands that have positioned themselves to exploit the world's soon to be third-largest food and beverage market. Our aim is to highlight examples of innovation in products that reflect a wide variety of on-trend formats, new concepts, ingredient and flavor mash ups, and companies that are helping to not only redefine the customer experience as well as their category, but are also serving a specific purpose for consumers by delivering a new value proposition to the market.

Purveyor of Chocolate Coins for Kids and Teens

→ Company Name and Profile: Pee Pee Appliances Pvt. Ltd. was started in 1909 and is today an ISO 9001 certified diversified trading and manufacturing company with several business verticals under the banner of Pee Pee Group. The company is mainly into distribution of electronics and home appliances of all major brands. It also manufactures home and kitchen appliances and plastic house ware under the brand name 'Hanbao'.

Brand Name: After launching its food division seven years ago, Pee Pee Appliances became a manufacturer of a variety of cocoa-based premium chocolates under the brand name 'Jumbo' and 'Nature N Nature'.

Product Portfolio: Coin chocolates; bar chocolates; choco nutties; choco crispers; choco dates; nutty dates; osmo de-hydrated fruits; real fruit squashes.

Key Markets and Customer Segments: Active in all South Indian markets and catering to all age groups but with a special focus on teens and kids.

Best-selling Product: Coin chocolates; Currently, the company manufactures 10 million coins monthly with the target to reach 25 million coins soon.

Product USP and Differentiator: All chocolates are 100% pure vegetarian and made at its ISO 22000 certified manufacturing unit. The packaging is high-tech and is done with advanced and fully automatic machines. Besides, the products are tested and certified from food labs and authorities concerned.

Recent Launches: New varieties in coin chocolates, its flagship product. It has plans to bring in more exclusive varieties and sizes to this range and to launch premium luxury dark chocolates with high cocoa content in different varieties, shortly.



Customer Value Proposition: Brought innovative value for its customers by providing a mix of choco and dates combined with almond stuffed inside. Similarly, nuts and dates are mixed together in its nutty dates offerings. The raw materials for the chocolate products are high quality cocoa butter raw materials and the use of additives or preservatives is strictly under the legal limits. Chocolate



“



Our products have the highest nutritional value certified by food labs and authorities. We develop innovative products according to the latest and newest market trends. For example, there is a trend towards the consumption of more dark chocolates among the young and we plan to have more diverse varieties in that segment. We do other value addition by providing special festival packing and customized packing for corporates and institutions.

— Pravin Kumar P. Jain
MD, Pee Pee Appliances Pvt. Ltd.

gift boxes come with different counts and in different sizes of reusable quality boxes. Its treat packs for premium nutty chocolates and choco crispers also have attractive packaging.

Retail Strategy: Across South India, the brand has its footprint in hypermarkets, supermarkets, grocery retailers and departmental stores. On a pan-India basis, the brand is available at some modern trade outlets currently and is working to extend its reach to all modern trade outlets across India in all segments of the retail market – from modern trade to departmental stores – for boosting consumption of its products.

Future Plans: Introduce new SKUs in premium chocolate varieties to focus on modern trade and also develop its export segment.

Tasty, Sticky Treats for Youngsters

→ **Company Name and Profile:** GP Foods Pvt. Ltd. is a joint venture established in 2011 between Garuda Food of Indonesia and the Polyflex Group of India.

Brand Name: Gone Mad.

Product Portfolio: Choco stick; choco strawberry stick; cashew mithai stick; choco orange stick; badam stick; jelly drink; sugar cheese cracker; chocolate drink; festive gift packs.

Key Markets: Karnataka; Tamil Nadu; Andhra Pradesh; Kerala; Rajasthan; Gujarat; Delhi; Mumbai.

Product USP and Differentiator: Gone Mad products are deliciously quirky and appeal to the lighter side of everyone. The brand identity is based on being playful, spontaneous, entertaining and engaging, and synonymous with a youthful world where one can let loose one's unabashed love for food. Being innovative and unconventional has always been Gone Mad's mantra while creating products. The first Gone Mad choco stick was based on this theme. While other competitors were busy offering the count line bar, it introduced a new product – which had wafers on the outside and chocolate inside. The product was a run-away success and several new companies came up with a similar product but were unable to match Gone Mad's quality consistency.

Recent Launches: The brand has launched choco sticks in the wafer segment and sugar cheese crackers and coconut crackers in biscuit segment. The





The brand ethos of Gone Mad is 'unstoppable mad innovation'. We are fearless of change and always up for product enhancement, bringing along something of a rule-breaker attitude to produce a unique food product that grabs consumers' attention.

— P. K. Gopalakrishnan
Director, GP Foods Pvt. Ltd.

new sugar cheese crackers are coated with french cheese and sugar sprinkles. The product development was done to ensure both health and taste without compromising on safety.

Customer Value Proposition: Apart from great taste, the brand has successfully introduced newness in every category – be it chocolates, beverages, snacks or biscuits. Keeping in mind the new consumption experience of the new-age generation, the brand promise is built on providing something different from the others.

Retail Strategy: From the sales distribution point of view, the brand is planning to go truly pan-India instead of being a South-focused brand. In addition, its aim is to make Gery Gone Mad a household brand, and to make it a part of



planned-purchases of housewives for its delicious and quirky offerings.

Future Plans: The company has set its sights on a bright new future. In the last quarter of 2017, JV partner Garuda Foods Indonesia and owner of Gery Brand Mad decided to associate Gery with Gone Mad. As a result, the company modified its branding of Gone Mad sugar cheese crackers to Gery Gone Mad sugar cheese crackers. With this development, the Gone Mad brand has elevated itself to becoming an international brand, taking the product to a whole new level.

Gery Gone Mad will now continue to bring out innovative products both from India as well as from its parent company, Garuda Foods Indonesia. In all its innovations, the brand DNA of being 'Deliciously Quirky' and brand values like spontaneity, freedom and anti-mainstream will be maintained to exceed the expectation of the target audience – the youngsters – while continuing to delight them with new, quirky offerings.



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Bringing the Best of International Foods to India

→ **Company Name and Profile:** D.C. Johar & Sons Pvt. Ltd. was set up in 1948 by late Rai Sahib Krishnalal Johar. The group has diversified into various verticals with experience in sectors like Distribution (National and Regional), International Trade, Manufacturing and Retailing for various companies such as Nestle, HLL, Britannia, Parry's, GSK, TATA, Mi Xiaomi, Dish TV, Nikon Cameras, Arvind Garments, United Colors of Benetton, Kingfisher and United Spirits Limited (now Diego). It also has its own brand of alcoholic beverages – Johars – currently one of the oldest brands in Kerala.

Brands Represented by the Company: Johars represent many iconic brands in the innovative and healthy foods category. Currently, they import the UK's No. 1 cereal brand 'Weetabix' as well as the original and true muesli brand 'Alpen'. They also import SoyFresh Soya Milk.

Brand/Product USP and Differentiator: The ingredients that come together to form Weetabix cereals and Alpen muesli are their unique selling points. Weetabix is made out of 100% whole grain, is rich in fiber, allows for a healthy digestion,



“



We represent many iconic brands in the innovative and healthy foods category, including the UK's No. 1 cereal brand 'Weetabix' and muesli brand 'Alpen'.

— Y. V. Vijay Kumar
GM, D.C. Johar & Sons Pvt. Ltd.



soya milk and is a source of protein, calcium, and Vitamins A, B1, B2 and B12.

Customer Value Proposition: Weetabix Food Company is the second-largest branded manufacturer of cereals and cereal bars in the UK. Based in Northamptonshire, its family of brands includes Weetabix and Alpen, which are now part of Post Holdings USA. The Weetabix brand has been manufactured and sold in the UK since 1932. Today, it is the UK's number one selling, most trusted and most recommended cereal and also one of Britain's most iconic brands.

gives a boost of energy and is also low in sugar and salt, which helps prevent diabetes and obesity. The combination of these ingredients is the reason why it is considered the number one healthy breakfast in the UK and why many individuals and mothers prefer to consume Weetabix over any other brand.

Alpen muesli uses the finest and most natural ingredients – creamy rolled oats, roasted almonds, juicy raisins, crispy whole grain wheat flakes – which are rich in flavor and offer unmatched taste.

Soyfresh Soya Milk has high soya protein

Soyfresh Soya Milk is a nutritional yet savory drink for modern healthy living. It is an ideal product for vegetarians as it is plant-based, contains no animal fat and is made from non-GMO beans imported from Canada.



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Understanding Global Preferences in Gourmet Foods

→ Company Name and Profile: Intergrow Brands Pvt. Ltd. is a Synthite Group company with a Rs. 2,000 crore topline. Intergrow was set up with the intention of focusing on consumer markets in India and abroad.

Brands Represented: Sprig and Kitchen Treasures.

Product Portfolio: Sprig caters to global tastes and has 50 SKUs under it. Its products range from spices, natural extracts, food colors to exotic sauces and gourmet green tea.

Key Markets: The target segment for the brand is NCCS A1 & A2. The geography focus is metro cities and Tier-2 cities in India. It is expanding internationally to GCC and the US shortly.

Best-selling Product: Vanilla extract is the best-selling product. Vanilla is a very sensitive product and requires meticulous processing in converting to the extract without losing the inherent goodness. Sprig vanilla extract is also the only alcohol-free vanilla extract in the

market and uses vanilla beans sourced from Madagascar. Noticing the trend towards health-based products, the brand also released a range of green teas and honey in flavours such as curcumin-honey (turmeric-based).

Brand USP and Differentiator: The core value difference is in the deep understanding of global preferences in gourmet foods. With its legacy, Intergrow is able to source the right ingredients from across the world to curate and to realize products. Some of the processing techniques that it has access to are cutting-edge, like CO2 extraction process, to separate top notes of spices and the ability to extract flavors by purely physical methods.

Recent Launches: The brand has launched close to 30 new SKUs in the last three years. Categories like sauces made from Bhutjolokia, sauces from Mexican chile- Habanero, the exotic mango-jalapeno and the oriental ginger teriyaki complete the range. In spreads, the newest range includes unique flavour combinations like chocolate and peanut

“



The R&D at Sprig is supported by a dedicated Rs. 100 crore facility focused on developing new products and processes for the food industry. The range of work involves developing new flavours in heat-stable natural colors and plant-based proteins.

— Ashok Mani
MD and CEO, Intergrow Brands Pvt. Ltd.

butter, coconut and ginger caramel, classic salted caramel and coffee, and chocolate.

Customer Value Proposition: The brand offers natural alternatives to additives and develops products where usage of additives is eliminated or minimized. Most widely consumed sweet-spreads in the market have high levels of hydrogenated vegetable-fat or oils. At Sprig, a good percentage of milk-solids are used in creating spreads. Rosemary extract is an excellent example of a natural anti-oxidant in processed food and Sprig strives towards adopting such ingredients to minimize additives.

Retail Strategy: For niche brands like Sprig, Modern Retail plays a huge role in giving the right platform to reach out to customers. Sprig is a pre-dominantly MT focused brand and is looking to expand into other areas with the help of partners who have in-depth knowledge of the segment and market.

Future Plans: The brand measures success in terms of understanding customer preferences in the segment better. It is looking at developing 1,00,000 loyal customers in the near future.



Creating Customized Products for Different Segments

→ **Brand Name:**
New Tree.

Product Portfolio: The brand offers unique healthy snacking options and the product range includes nuts, berries, fruits, trail mixes and Indian savory snacks such as makhana, khakhara and roasted namkeens. They have over 30 varieties of khakhara.

Key Consumer Segments: With a diversified product range, New Tree caters to consumers of the young working population between the ages 25 to 45.

Product USP and Differentiator: The products are unique in quality, taste and packaging. The Trail Mix is made by combining the finest ingredients to create a product of the highest quality and is also unique because of its flexibility. New Tree has customized its products as per the requirements of different groups of



customers and advocates a more healthier lifestyle for the working class.

Retail Strategy: While offline retail contributes to 80% of sales, online retail marks up 20%. In offline trade channels, sale via modern trade results in 40% of total revenue and general trade generates 30% of it. 10% of the brand's revenue also comes from corporate sales.

Future Plans: In offline retail, the brand is in the process of setting up distributors

“



Traditionally, people in India used to consume nuts, berries and seeds only in the winter season. However, with growing awareness on these items' health benefits, we see good sales throughout the year.

— Savinay Jain
Founder and CEO, New Tree

in Tier 1 and Tier 2 cities. Online retail is also a focus area and the brand expects the channel to contribute to 40% of the entire business by 2020.

Championing the Organic Cause

→ **Brand Name:**
Truefarm Foods.

Product Portfolio: The brand offers a wide range of nutritious and 100% organic products such as red quinoa, chia seeds, health flour (gluten-free alternative to wheat flour), grains, millets, seeds and breakfast cereals (oats and muesli).

Brand USP and Differentiator: Truefarm currently sources about 50 to 60 organic ingredients from thousands of farms across the country. This way, Truefarm also helps farmers adopt sustainable agricultural practices that enrich the quality of the soil and enable them to get better prices for their produce. These products are chemical-free and pesticide-free and are certified by Indian, European and American standards.

“



We engage with farming communities across the world to cultivate 100% organic crops. It is followed by our relentless pursuit for preserving nutrition in every next step.

— Ravi Jakhar
Co-Founder and Director,
Truefarm Foods

Customer Value Proposition: Its protein plus flour delivers an exceptional 24.4%



protein through a simple bread, chapati or pizza base. Its organic oats have up to 20% more protein, 70% more fiber and 23% less fats. Super mix dal and basic products such as jaggery powder, barley and red poha also stand out on taste, quality and nutrition parameters. The brand's idea is to provide such options to consumers that help them meet their nutritional goals.



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For That Gourmet Experience At Home

➔ **Brand Name and Profile:** The Gourmet Jar started from Apeksha Jain's (Chief Confiturier) home kitchen and has grown in terms of product portfolio and distribution scale. Its products are available in over 100 gourmet stores across India and are served in some of the best luxury hotels.

Product Portfolio: The range consists of the finest gourmet condiments and includes preserves, pesto, mustard, savory spreads, and infused honey that are 100% natural, curated with distinctive flavours and no added preservatives.

Key Markets: Delhi, Mumbai and Bangalore are key markets. The target mix consists of consumers that are well-traveled, health conscious and shop regularly at premium supermarket chains.

Best-selling Product: Fig Almond Conserve – a unique blend of fresh figs sourced from Nashik along with a secret spice mix and almonds.

Product USP and Differentiator: The range of gourmet condiments is made from farm-sourced produce, has no additives or preservatives and is 100% natural. The brand manufactures products in small



handmade batches to ensure quality and a perfect blend of flavours. Product packaging is exceptional and stands out for being modern, simple and recognizable.

Recent Launches: The brand started by producing jams and preserves and has now enhanced its portfolio to include mustards, relishes, gourmet honey and savory spreads with innovative flavour combinations in pesto sauces and tapenade.

Customer Value Proposition: Keeping up with health-conscious trends, the brand's products have relatively less sugar with some like Jamun Preserve being diabetic friendly. All their raw ingredients are sourced fresh and are processed using traditional methods of production. Most products have high fruit and low sodium content, and can be used in various applications during breakfast, lunch or dinner.

Retail Strategy: Explosion of modern trade has really helped the brand in achieving a premium market positioning and also reaching out to its target audience. Being a start up with paucity of marketing funds, brand visibility at appropriate modern trade stores is key. The Gourmet Jar's cost of customer acquisition tends to be relatively lower and presents an ideal platform to build the brand in the long term. Brand presence is constantly being expanded using promotional activities and merchandising in newer outlets.

Future Plans: The brand has an extensive R&D program and continuously innovates in other categories of condiments by fine-tuning new recipes based on feedback from analysts. It is expected to release a bunch of new products along with expanding business into cities such as Chennai, Ahmedabad and Pune.

“



To refine our range of gourmet products, we focus on initiatives such as progressive testing methods to improve shelf life without altering product taste or nutritional content.

— Rishab Suresh
CEO and Co-Founder, The Gourmet Jar

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At the Forefront of Healthy Snacking

➔ **Company Name:**
Greendot Health Foods Pvt. Ltd.

Brand Name: Cornitos.

Product Portfolio: Cornitos has a complete range of healthy snacks, nacho crisps, tacos and a Pop N Crunch range which includes premium cashew, California almonds, coated green peas, party mix, peanuts, pumpkin seeds and sunflower seeds.

Product USP and Differentiator: The brand spearheads the healthy snacking market in the country. Its products are fresh, have no preservatives, are natural and minimally processed so as to prevent diseases and promote good health. Key product attributes also include non-GMO, zero transfat, zero cholesterol and high in protein with natural and nature identical seasoning. Product focus is on unique preparation and healthy

“



Cornitos sale has seen a positive growth in the last couple of years due to changing consumer preferences for healthy snacking. There are more grains and seeds being used in upscale products.

— Vikram Agarwal
MD, Greendot Health Foods Pvt. Ltd.

ingredients. Nacho crisps are cooked in healthier corn oil and are made by the Mexican lime-treatment process of making traditional masa using stone ground Non-GMO corn.



Recent Innovative Launches: Quinoa nachos have transformed normal nachos to a healthy snack that can be enjoyed guilt free. It is made from nutritious super

grains - quinoa, chia and flax seeds blended with corn masa. The snack is a protein power house enriched with Omega-3, is high in fibre and gluten-free. Veggie nacho crisps are also a popular and healthy choice.

Customer Value Proposition: Corn is a good source of fiber and has digestive benefits which make nachos the perfect healthy snack choice. The nitrogen flushed technique keeps the product fresh for months. While regular potato chip has a four-month shelf life, Cornitos Nachos have a shelf life of six months.

Producing High Quality Functional Foods

➔ **Company Name and Profile:** The Raw Factory started out in April 2017. Within a year and half, The Raw Factory has three successful brands under its umbrella with over 35+ products across various categories.

Brands Represented: Raw Essentials; Kitchiez; The Snack Story.

Product Portfolio: The product range includes single-ingredient, natural superfoods that are completely unprocessed, a curated range of gourmet cooking and baking essentials and real snacks made with wholesome ingredients.

Product USP and Differentiator: The brand produces functional foods of the highest quality. It maintains the right balance between health and taste,

“



While the company has made a mark in the online space, it is moving towards expanding the offline trade channel.

— Vijeth Shanbhag
Co-Founder, The Raw Factory

“



The Raw Factory is a one-stop destination for everything food-related and we strive to make our products more accessible.

— Swati Bhandary
Co-Founder, The Raw Factory



making sure eating healthy does not necessarily compromise on product taste. All products are thoughtfully sourced and carefully crafted to give a wholesome culinary experience.



Don't worry,
be **Waffy!**



Nutty About Upwardly Mobile Millennials

→ Company Name and Profile: Vie Foods Pvt. Ltd. was incorporated in 2013 by Founder and Director Paavani Jella as a company specializing in natural foods and healthy snacks. Its operations started in July 2014 with products like quinoa, palm sugar and desiccated coconut.

Product Portfolio: Paleo bars; grab-and-go nuts; fruit bites; roasted 'n'salted seeds; Super7 trail mixes (made out of seven healthy nutritious ingredients); 100Cals.

Key Markets: These products are aimed at the upwardly mobile working millennials and the gen X market, and are placed in Sec A, A+ and B stores in metro cities.

Best-selling Products: NutNut bars and Zealeo desiccated coconut.

Product USP and Differentiator: Vie Foods is a natural food company providing high quality nutrient-dense foods with minimal to no processing to retain the original nutrition profile close to its ingredients. The brand sources quality ingredients from trusted suppliers and farmers and closely monitors procurement, manufacturing and delivery. Most products are innovative either in their composition or in their nutritional value and boast of low carbohydrate level.

Recent Launches: The product proposition of 100Cals revolves around creating food items that are substantial in quantity and perfectly portioned at 100 calories. This is about giving customers the satisfaction of eating a sizable amount of snack with the added satisfaction that it is made from whole foods and is only 100 calories.

Customer Value Proposition: Each product is targeted towards healthy snacking options for sedentary lifestyle customers. However, they are suitable for all ages to promote healthy eating without compromising on taste and quality. Along with production monitoring, a microbial analysis is done on every batch of shipment for safety

“



We are looking at several strategic in-store and co-branded initiatives with some of the leading modern retail chains to promote our products and dissipate the value that we bring.

— Paavani Jella
Founder and CEO, Vie Foods Pvt. Ltd.



measures, and monitoring of supply chain is also done in case any recall measures have to be applied. With the help of packaging expertise from Indian Institute of Packaging, Hyderabad, and a few experienced manufacturers, the brand formulated packaging pouches and wrappers with 6-18 months of shelf life.

Retail Strategy: The brand is present in Modern Trade chains in Hyderabad and online through Bigbasket and Amazon. It has also ventured into GT in certain geographies to evaluate right demographics and product market fitment. The brand is expanding the NutNut product placement in MT markets of Bengaluru, Mumbai, Delhi, Chennai and Coimbatore and the GT markets of Hyderabad, Bengaluru and Mumbai.

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Fresh From The Farm to Pickled and Preserved

→ **Company Name and Profile:** Neo Foods Pvt. Lts.- is a Bangalore-based food processing company, specializing in preserved vegetables and fruits. Most of its food products are grown in farms and then pickled in a facility in Tumkur, Karnataka.

Product Portfolio: For the international market, the brand exports pickled gherkin, jalapeno, baby corn, capsicum and different relishes. For the Indian market, the range varies from pickled vegetables like gherkins, jalapeno, onions, baby corn, olives, carrot, zucchini, capsicums to relishes, canned fruits like peach, litchi, cherry, pineapple, fruit cocktail to different sauces, baked beans,



“



We work very closely with an R&D team of customers, various QSRs and chefs, and understand their requirement to design and develop the product. This dedicated team works on developing new packaging, new technologies and also works on harmonization of process requirements.

— Shalini Jalan
Director, Neo Foods Pvt. Ltd.

“



We strongly feel that product sampling/tasting at the point of purchase and simultaneously educating the customers on various usages will induce more awareness and influence higher consumption.

— Ashok Sinha
India Business Head, Neo Foods Pvt. Ltd.

vinegars, prunes, canned mushrooms and many more products .

Key Markets: Neo is exporting to UK, Germany, France, Austria and America besides servicing the Indian market. It has a pan-India presence and is marketing and selling on its own through distributors to retail stores, hotel and restaurants.



Product USP and Differentiator: The brand's salsa sauce is great with Mexican food and gherkins and relishes are great for party snacks. The pizza pasta sauce and red paprika are a must for Italian cuisine while baby gherkins and vinegars go excellently on salads. Neo's products are ready-to-use and can be used with a number of different cuisines to create different dishes. Since the brand uses a contract farming model, raw vegetables used in products are fresh and free of harmful chemicals.

Recent Launches: Pizza toppings (three variants); pizza veggie toppings with sauce (three Variants); mixed jalapeno – hot & spicy sauce; baked beans in thick tomato sauce. Popular products include jalapeno, red paprika and gherkins.

Retail Strategy: Apart from metro cities, the brand has penetrated the next “A” class cities and will now focus on consolidating business in these cities. At present, it is present in around 40 cities across India. Its customers are SEC B+ and above and are people who are adventurous with food and trying out cooking different types of dishes or snacks items. Neo Foods is focusing only on Modern Trade outlets – national chains, regional chains and popular local standalone retail stores. The brand creates new opportunities through various sampling activities and by educating customers on the usage of its products.



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Making Chocolate Sinful No More

→ **Company Name:**
Pansuria Confectionery & Foods.

Brand Name and Profile: Toska Chocolates was incorporated in August 2016 as a premium bean-to-bar Indian artisan chocolate brand. Large-scale production started in May 2018 and the brand's chocolates are now available in Ahmedabad, Mumbai and Delhi and on its website.

Product Portfolio: Toska Chocolates has a total of 12 types of flavours. It offers three types of white chocolate (rose and saffron, pistachio and cocoa nibs, cranberry), three types of milk chocolate (strawberry and almond, coffee and cardamom, ginger), three types of dark chocolate (biscuit and berry, smoked salt and crystallized sugar, hazelnut) and

“



Consumers are increasingly demanding pure chocolates with less sugar, more cocoa, high-quality ingredients, exotic flavours and innovative packaging.

— **Ishan Pansuria**
Director, Pansuria Confectionery & Foods



three types of single-origin chocolate (Madagascar, Brazil, Java).

Best-selling Product: Biscuit and Berry (dark chocolate), Strawberry and Almond (milk chocolate) and Madagascar (single origin dark chocolate) are the three flavours that have proved extremely popular with consumers.

Product USP and Differentiator: The interesting factor about Toska Chocolates is that it doesn't use any type of bad vegetable fat in chocolate bars. The brand's chocolates are made up of cocoa powder, sugar and cocoa butter that is extracted out of cocoa beans sourced from South India, Brazil, Madagascar, Java, Ghana, Tanzania and St. Dominique. All the ingredients used in the chocolates are certified organic. The flavours are truly innovative as the brand does not use any kind of essence or flavoured oil in the chocolates. Fresh fruits, nuts, berries and flowers are added to give different flavour profiles. For e.g., in the rose and saffron chocolate bar, flavour is born out of dried rose petal and Kashmiri kesar.

Customer Value Proposition: Chocolate receives a lot of bad press because of its high fat and sugar content, due to which its consumption has been associated



with acne, obesity, high blood pressure and diabetes. To avoid this, the brand buys well fermented and dried cocoa beans and carefully develops the best flavour profile by processing these cocoa beans in small batches to ensure purity. Consuming pure dark chocolate helps in lowering cholesterol levels, preventing cognitive decline and reducing the risk of cardiovascular problems.

Retail Strategy: The brand initially faced a lot of resistance from retailers owing to the voluminous nature of the product and the MRP. However, Toska's strategy has been to introduce many types of variants to fulfil the taste of all kinds of people and hire a marketing representative to explain its products to the consumers shopping at such places.

Future Plans: The brand is introducing jars of chocolates coated nuts and berries, and boxes of miniature chocolate bars to target the corporate gifting sector. The brand aims to create brand awareness by explaining the difference between bad chocolate and fine chocolate through workshops, social-media, collaborating with food bloggers etc. It will also be introducing eight more flavours of chocolate bars and other interesting chocolate boxes by January 2020.

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Nuts and Seeds Galore for a Healthful Plate

→ Company Name and Profile: Healthfull is a Chennai-based FMCG brand that focuses on nuts, berries and seed-based packaged snacks as well as ready to cook products.

Product Portfolio: The brand specializes in two segments – packaged snacks and ready-to-cook products with a focus on mixed nuts, seeds and dried berries. Some exclusive products include black pepper cashew, premium fig, sweet amla, dried pineapple, dried papaya, jamun powder, sugar-coated almond, mixed fruit candy and pitted prunes. The ready-to-eat segment has products such as quiona dal khichdi, quiona rawa upma mix, quiona pongal, quiona rawa dosa and quiona kheer.

Key Markets: Punjab; Gujarat; South India; North East India.

Best-selling Products: Dried blueberry; salted almond; roasted almond; seedless black kismish; cranberries; mixed berries; mixed nuts; salted party mix.

Product USP and Differentiator: The theme of the products revolves around the fusion of taste and health. All the brand's products having a seed, nut or berry component are high in nutrient value and



encourage healthy snacking. Purchase of significant raw materials is made directly from Indian farmers, thus ensuring



“



With more than 60 products selling in the category, we have successfully launched our packaged food product portfolio and achieved revenues of Rs. 1.30 crore within a year using no sales force and minimal marketing expense.

— Amit Kumar
Managing Director, Healthfull

quality. As the urban population witnesses a rising number of working women and single member households, there is an increased dependency on ready-to-cook and ready-to-eat food. Healthfull makes packaged and processed food that in no way compromises on nutritional value.

Retail Strategy: The brand focuses on placement of products at major retail outlets across the country with a listing of products also present on online platforms. It is also looking to open its own online retail store. Emphasis is also given to targeting corporate and institutional vendors and packaged food outlets at airports and railway stations.

Future Plans: Having formulated five ready-to-cook products, the brand looks to create a number of different formulations giving a seed, nut and berry twist to traditional Indian cuisine. New product launches will be aimed at seasons, occasions and special events. A sales office is also going to be set up in Mumbai, Delhi and Bangalore to build a strong distribution network in India and in the export market. An additional processing unit is also to be set up in Mumbai.

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Functional Superjuice

→ **Company Name:**
Fettle Works LLP

Brand Name: Poshn

Product Portfolio:
Energy and relaxation juices.

Product USP and Differentiator: The major ingredients of Poshn are fruits and herbs and most of the raw materials used in the product are imported from Israel, Germany and some parts of Asia. As an all natural concoction of fruits and herbs, the product acts as a great natural energizer for boosting your workaday functions. The fruits and herbs are mixed delicately to offer great taste without any added sugar.

Customer Value Proposition: The product is particularly useful for those who are lactose intolerant. For those who cannot have a cup of coffee in office and

“



Our focus is on delivering a high quality product, that not only tastes great but also solves the problems of nutrition, lactose intolerance and lack of sleep. The unique concoctions we have created act as secret formulas for meeting someone's daily energy needs.

— **Rahul H. Kakkad**
Founder and Partner, Fettle Works LLP

don't want to go for unhealthy sodas or sugar filled beverages, Poshn offers a truly healthy energizing drink. The fruits used in the preparation of the energy juice



are all tropical and rich in vitamin C. In addition, natural herbs like Ginseng and green tea are added to the product. Similarly, Poshn relaxation juice uses all types of cherries and berries that are high in melatonin. The product is also powered with herbs like chamomile, which naturally helps one to relax and get a good quality sleep.

Fulfilling Nutritional Requirements for Children

→ **Company Name and Profile:** The Mumum Co. is one of the first companies in India focusing on serving the market for healthy snacks specially made for children.

Product USP and Differentiator: The brand stays away from any added sugar and preservatives. The Mumum Co.'s range focuses on fruit, vegetables and multi-grains with eye-catching labeling and packaging. All raw material is sourced thoughtfully and responsibly.

Recent Launches: The Mighty-Melties are freeze-dried fruit blends that are essentially a “smoothie in a bag”. The Cool Crunchies and Super Sprinklies are made of roasted, locally-sourced super grains like ragi, jowar and barley flavored with fruit powders.

“



We wanted to make something with simple ingredients that a mother can trust to be child-friendly.

— **Shreya Lamba**
Co-Founder, The Mumum Co.

“



We decided to create our own range and this has been a labor of love starting from slow baking fruit in our kitchen.

— **Farah Nathani Menzies**
Co-Founder, The Mumum Co.



Key Markets: Available online all over India and in various stores such as Godrej Nature's Basket and Foodhall across six cities – Mumbai, Pune, Delhi, Bangalore, Chennai and Hyderabad.



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Hazelnut

Mindful Snacking: Blending Taste and Nutrition

→ **Brand Name:**
EAT Anytime.

Product Portfolio: The brand's product range consists of energy and nutrition bars in the flavours of peanut butter and choco, orange, mango ginger, butterscotch, berry and blast, and chyawanprash.

Key Consumer Segments: The brand targets working professionals between the ages 24 to 35.

Best-selling Product: Butterscotch sells the most because most people associate energy bars with protein and granola based bars, and not with fun or sweet flavours.

Brand USP and Differentiator: EAT Anytime was started with the concept of mindful snacking in mind. This brand gives customers a portable but wholesome product that isn't too heavy on the pocket.

“



The need of the hour is to educate the modern consumer on the category of nutrition bars and its inclusion in the casual snacking menu.

— **Rishit Sanghvi**
Founder and CEO, EAT Anytime



Most people are of the opinion that healthy food can't be tasty and delicious but EAT Anytime maintains a golden balance between taste and health.

Recent Launches: The brand introduced an innovative product in the form of a nutrition bar in the flavour 'bambaiya chaat'.

Retail Strategy: Its major distribution channels include e-commerce, modern trade, general trade and customer-outreach lines such as corporate canteens and institutional/organizational tie-ups.

Future Plans: The brand wants to strengthen its presence on online retail channels as this helps work around the challenge of expensive and limited shelf space at mainstream retail stores. In addition to that, it will shortly be launching protein cookies in the mindful snacking segment.

Quality Products at Affordable Prices

→ **Company Profile:** Om Oil And Flour Mills Ltd. The company started as a one man army in 1976. It currently employs over 1200 people and has over 240 SKUs across segments.

Brand Name: Ruchi.

Product Portfolio: The brand is one of the leading manufacturers and exporters of quality spices, vermicelli, pasta, noodles, frozen food, ready-to-eat and non-CSD beverages in India. It produces more than 300 varieties of ground spices, whole spices, vermicelli, pasta, noodles, frozen food, bakery and ready-to-eat beverages.

Best-selling Product: Vermicelli is its best known product range, especially kheer mix. Dal Tadka is also popular as it has high-quality lentils.

Brand USP and Differentiator: The brand manufactures Italian pasta using twin technologies from South Korea and Italy, and also markets frozen ready-to-eat items under a cold chain project. The brand ensures quality of products by adapting a packaging technology using five-layered vacuum packs. It focuses on hygiene, health and innovative packing at affordable prices. Hard work and loyalty of all employees, cordial relationships between employer and employees,



“



We, at Ruchi Foods, adopt a farm to fork pesticide-free process to ensure that our customers get healthful products.

— **Rashmi Sahoo**
Director, Om Oil And Flour Mills Ltd.

integrity of management, best services to customers and consistency in the quality of all products are the main factors for the growth of the organization.



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Providing the Best Nuts, Dry Fruits and Healthy Seeds

→ **Company Name:** Happilo International

Brand Name and Profile: The Happilo brand is one of the largest south India importers of dry fruits and dried fruits and it offers a complete range of nuts, dried fruits, fusion, peanut butter, apple cider vinegars including homegrown and imported products.

Key Customer Segments: The client list includes the country's top supermarkets and food chains. It is also a major HoReCa supplier and also supplies to the Railways, airlines and MNCs for their customized requirements. Happilo also works with banks, IT corporates, hotels and real estate companies for their co-branded corporate gifting requirements.

Brand/ Product USP and Differentiator: With an exclusive range of dry fruits, dried fruits, spices, healthy seeds, trial mixes, festive gift hampers and more, Happilo stands for delivering quality food products of international standards

“



Currently, we have 50+ varieties of health foods with a massive production facility capable of producing 40000+ quality units per day. We have plans to add more to the basket offered to our consumers.

— **Vikas D Nahar**
Founder, Happilo International Pvt. Ltd.

and quality and with a range that caters to every budget and taste, its best sellers have found their way into the homes and hearts of many households. It also offers customized solutions for institutional buyer needs, private label packing and cross branding.

Customer Value Proposition: Happilo's exclusive range of festive gift ideas helps enhance the festive moments and make them special with its healthy & tasty gift box of dry fruits.

Best-selling Products: California almonds; trial mixes; walnuts; berries.

Retail Strategy: The gourmet brand is available across all leading Modern Retail and General Trade outlets besides being one of the most popular dry fruits brands searched for on e-commerce websites. The brand enjoys a wide distribution network across India with more than 30 channel partners to cover the entire length and width of the nation and will continue to seek new opportunities.



Baking at Home Made Effortless

→ **Company Name:** Blue Bird Foods (India) Pvt. Ltd.

Recent Launches: The company has launched a first of its kind cake mix that was conceptualized to make baking easier. A batter can be prepared by adding water to the cake mix and mixing well before a stint in the oven. The resulting cake is spongy, light and has ingredients of the finest quality.

Product USP and Differentiator: All products by Blue Bird maintain international standards of quality and provide a value for money to its consumers. The company holds high ethical standards and focuses on the consistency of product. In order to make

“



Our company continues to invest in new, efficient production facilities and expand its geographical footprint. Blue Bird can effectively evolve and set new standards with constant innovation.

— **Manish Shah**
MD, Blue Bird Foods (India) Pvt. Ltd.

baking at home easier, the products use simple ingredients with nutritional value and render the preparation process easy to follow and execute.



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“We have started the trend towards organic baby food in India”

Pankaj Prakash, Founder & CEO, Nascens Enterprises Private Limited, which operates baby food brand Happa Foods, speaks to Progressive Grocer about providing a healthy alternative for every stage of a child’s food journey with offerings suited for every meal – from breakfast to lunch boxes, snacks to munchies.



We take simple, natural ingredients that ooze goodness to create kids’ food and packaging in a way that it really connects with little ones – with flavors, colors and textures that appeal to all their senses.

— Pankaj Prakash
 Founder & CEO, Nascens Enterprises Pvt. Ltd.

Tell us about your company and its business.

Happa Foods, operated by Nascens Enterprises Private Limited, is an organic fruits and veggies-based food company for babies. At Happa, we passionately believe that mothers and kids should have access to food that is healthy, tasty and fuss-free. We think it’s important to always approach things from a child’s point of view. So, we take simple, natural ingredients that ooze goodness to create kids’ food and packaging in a way that it really connects with little ones – with flavors, colors and textures that appeal to all their senses. Our aim is not just to make the food good but also work for the betterment of the environment and our local communities.

Which are your baby food products?

These are the early days of our journey as a baby food maker. We aim to provide a healthy alternative for every stage of a child’s food journey with offerings suited for every meal – from breakfast to lunch boxes, snacks to munchies. We have taken the first big step in this exciting journey with the launch of our fruit and vegetable purees. Currently, we offer over nine different types of fruits, veggies and grain-based blends. We have just launched our lactation bars, which combine the age-old wisdom of grannys’ recipes with scientific breakthroughs. These bars are filled with lactogenic ingredients and time-tested herbs (galatogogues) that aid in increasing milk production in a lactating mother.

Share with us your R&D and product development activities.

We took ample time to research and develop our baby food. We’ve heavily invested in a team that took over a year to develop products that could be stored at room temperature and did not need any



preservative. Each blend has been carefully crafted and helps kids in a variety of ways in their growth. Different colors and textures help babies continue to be healthy eaters when they grow up.

Which are the major markets and customer segments for your products and what is your retailing strategy?

Parents with the desire to feed healthy and wholesome food to their babies are everywhere in the country, cutting across socio-economic divides. Our strategy is to cater to people who are in search of these products. We are present across major e-commerce platforms that cater to people’s demands from anywhere in the country. Further, to reach closer to our customers, we have partnered with big box retailers. We have also gone live with major modern trade channels like Future Group, Reliance and others. In our next phase, we plan to go a step closer to our customer by getting into General Trade and make our products available in the neighborhood stores.

How is the baby food market in India shaping up and which factors will shape and influence higher consumption of your products?

The Indian baby food market has experienced significant growth over the past few years, primarily due to the rising population of working women and double income families, and their concern for good fuss-free nutrition for their babies. Furthermore, modern day parents are also actively seeking out the best for their children and are willing to spend when it comes to their little ones. Currently, owing to the increasing demand for nutrition from natural sources, the organic baby food segment is growing at a significant rate globally. We, in India, have started to see the trend in that direction. **PG**

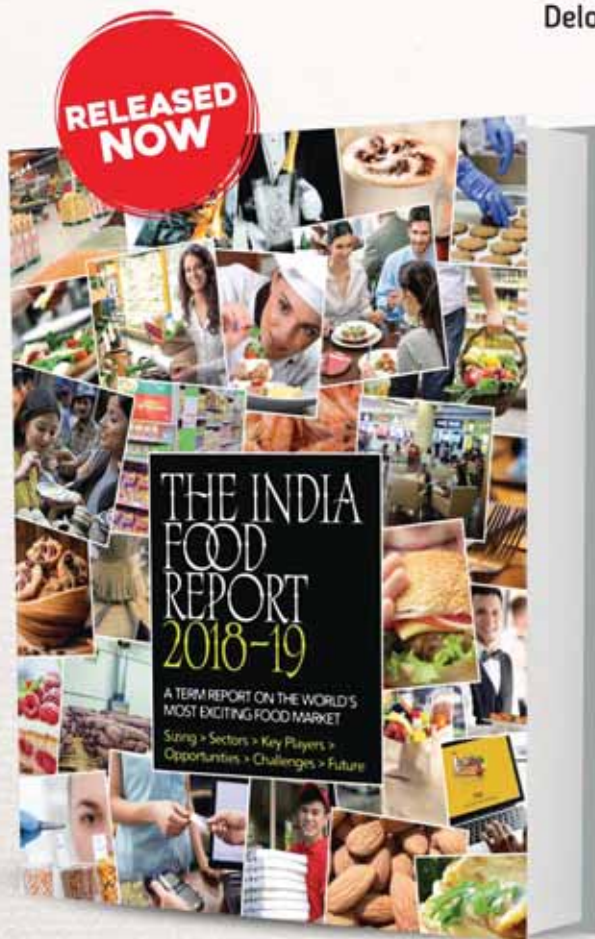
THE INDIA FOOD REPORT 2018-19

Sizing > Sectors > Key Players > Opportunities > Challenges > Future

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IS THE MOST
AUTHORITATIVE
GUIDE TO FOOD
RETAIL MARKET
IN INDIA**

The Report has been compiled with inputs from some of the world's most respected consulting and/or market study organizations, retail business heads, brand analysts and consumer research companies, among others. It offers extensive mapping, sizing of the food manufacturing, marketing and retailing sectors, benchmark figures on consumer spends and retail market size across key food categories and segments, opportunities for business and growth in key areas of Food Retail, along with observations by industry experts on key consumption trends, new concepts in F&G, FMCG, and F&B.

Organizations and industry experts who have contributed to the making of the Report include **Mintel, Euromonitor, Technopak, GS1, Deloitte, Wazir, Maple Capital Advisors, CBRE, FIFI**, to name a few.



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Organic Food An Opportunity in waiting?

The Indian Organic Market is a 'Sunrise Industry' and has been growing at over 20 per cent CAGR.

By Sunil Kumar

As per a study conducted by ASSOCAHM-ICCOA recently, the organic sector is expected to touch Rs. 9,000 crore in the next two years in India.

Organic products like rice, spices, tea and other value adds contribute over 60 per cent of both domestic and International sales. The emerging buying cities and markets in India include Bangalore, Delhi NCR, Chennai, Hyderabad, Mumbai, Pune, to name a few.

The total market constitution of organic food: Bangalore has over 120 organic stores, Chennai has chains selling organic food, Delhi-NCR has over 40 organic stores selling organic food and so on.

Emerging International markets like Canada, Japan, New Zealand, Australia and fast growing markets like the USA, Germany, Switzerland, Austria, etc., constitute over 70 per cent of International organic purchase compared to India, where it still hovers below one per cent.

There are many reasons for this small and low share, but notable enough are:

- High prices - Conventional products are three to four times more expensive.
- Lack of transparency and credibility - Consumer is confused on how to trust organic products. They think certifications in India are easily manipulated.
- Inconsistent and irregular supplies -There are many organic products which at times go out of stocks.
- Fake organics-As per reports about 30 to 35 per cent of organic products available on shelves are fake and dubious organic.
- Dual and inconsistent regulation - There are too many regulators - APEDA/FSSAI/ Third party certifications that make the availability even more difficult.
- Lack of awareness due to low investments in marketing. This is the main cause and most neglected feature of Indian organic market. There are hardly any investments on consumer awareness to increase the size of market. Can we make organic a \$2 billion opportunity for

India? The answer is YES. But how? In case a firm decides to follow the suggested strategies then the chances are very much high for it to be successful in the long run.

Use of transparency metre in pricing: This includes exhibiting clearly what is paid to farmers as procurement cost? What is spent as wages and salaries? What is being spent on processing?

Reduce trade margins on organic so as to improve off take: All organic companies should take out joint programme to convince retailers/distributors on health and off take aspect to keep trade margins within 30 per cent as compared to current trend of 40 to 45 per cent.

Implement and follow FSSAI regulations: The dubious organic, which is worth over Rs. 250 crore in domestic market, should be dealt with firmly. Hence, Jaivik logo should be enforced very strictly by the FSSAI.

Follow FPO & farm to fork approach: This will help improve and make supplies regular as well as consistent. Declare details of farms and farmers to win trust of the consumers.

Control of Organic certification should be in the hands of one Government authority: It should be either the FSSAI or APEDA or NCOF.

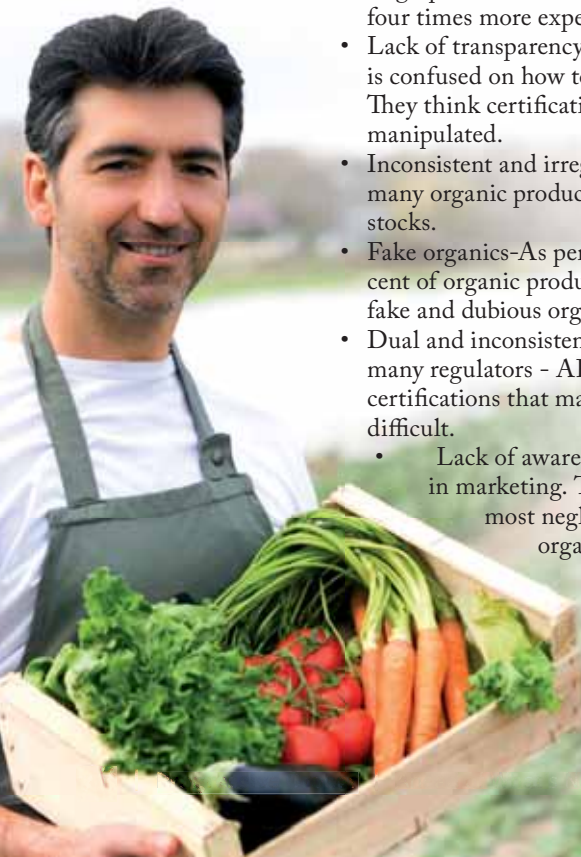
Invest heavily in marketing: We should promote organic food the way National Egg Committee has promoted eggs. We have to spread awareness.

Conclusion

Since health and wellness is a new trend and is growing very rapidly due to the outburst of diseases, there is no doubt that organic is the way forward provided we ensure transparency and value for money. **PG**



The author is General Manager, Kejriwal Bee Care India Pvt Ltd.



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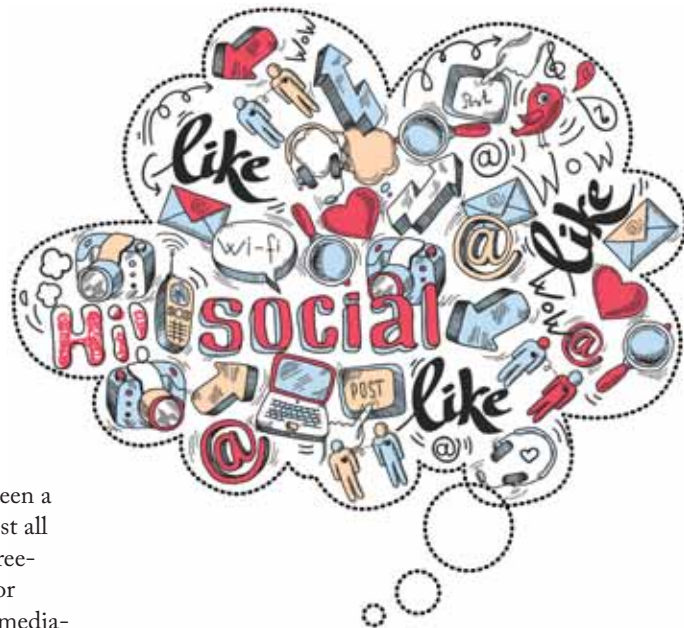
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Social Study

Most grocers are investing in social media — so why aren't more shoppers following?

By **Randy Hofbauer**



For years now, social media has been a big deal for food retailers: Almost all are on social networks, while three-quarters are making significant or moderate investments in social-media-related outreach, according to research from Tampa, Fla.-based marketing and promotions management company Aptaris and Cincinnati-based analytics firm Dunnhumby.

But while nine in 10 grocery shoppers regularly follow one or more social media sites, only one in four of that group is connected to her primary grocer, according to “U.S. Supermarket Shopper Update,” a recent report from the Retail Feedback Group (RFG), based in Lake Success, N.Y.

Why the disconnect? Some grocers simply might not be on social media. However, it could be more likely that many are on social media but terrible at offering compelling reasons to connect.

Therefore, grocers need to work harder to draw these people's interest.

“If the content is not relevant and updated regularly, shoppers will quickly lose interest,” says Brian Numainville, RFG principal. “Consider that content should include items that are helpful, fun and draw the shopper into a relationship with the retailer.”

Right Channel, Right Way

First and foremost, social media is social — it's not to be used just as a billboard, according to Margarita Fitzpatrick, Dunnhumby's head of customer engagement, North America. Grocers have to be interactive and engage users, and make sure that they reflect the essence of their brand in the process.

However, there's no “silver bullet” strategy when it comes to succeeding with a specific platform, as different exchanges have channels more suited to them. Take YouTube, for instance.

“Channels like YouTube ... are great avenues to show videos, which can include informational topics, events or contests,” Numainville notes.

But while RFG's research shows 53 percent of consumers using YouTube, only 33 percent of retailers are using the channel, according to an Aptaris study.

This reveals not only a gap that needs to be addressed across virtually all age groups, but also a clear opportunity for grocers to connect with people in a specific manner on the social media channel.

Coborn's, a Minnesota grocery chain based in St. Cloud, incorporates videos through its YouTube channel, for instance, whether they feature recipes demonstrated by employees, or discuss the community — they're compelling media from a local grocer to local people.

Of course, not everything might draw strong interest on social media. A good way to know whether something will gain traction and generate excitement is if it first has a real buzz outside of the cyber realm. Reputations are built outside social media, and then expanded within it, argues Paul Lencioni, president of Blue Goose Market, an independent grocer in St. Charles, Ill.

Speedy Delivery

For platforms lending themselves more to two-way dialogue — such as Facebook and Twitter — many grocers don't understand the importance of responding quickly. Lydia McNabb, social media coordinator with Woodland, Calif.-based grocer Nugget Markets, notes that she's always finding room for improvement in terms of responding to shoppers in a timely manner.

“In an area where immediate response is expected, we want to make sure to balance lightning speed with accuracy and thoughtfulness,” she says. “If our guests share a comment or question with us, we want to make sure we're giving them a response that is relevant and helpful, as well as prompt.”

U.K. grocer Sainsbury's is a prime example of speed when it comes to conversing via social

“
In an area where immediate response is expected, we want to make sure to balance lightning speed with accuracy and thoughtfulness.

— **Lydia McNabb**
Nugget Markets

media, using its platforms to respond in real time to customers, even when they're in the store.

"If a customer ... needs to find a certain item and they aren't able to find it, they can go through the social media platform and engage with a real person in real time, if you will, to help them answer that question," Dunnhumby's Fitzpatrick says.

But whether in real time or taking a little longer, grocers need to remember that shoppers use social media to connect with individuals. That being the case, a grocery business must find a way to present itself as an individual would.

"Anything that's institutional will bring a lack of authenticity, and will turn off a lot of folks on social media because they're looking for authenticity and engagement," cautions Fitzpatrick.



CONVERSATIONAL COMMERCE

For some time now, Facebook has been a great place for grocers to chat with their fans about everything from product favorites to suggestions on what to make for dinner. Now one East Coast grocer is using the platform's chat app to help its fans receive those products and set the dinner table with ease.

FreshDirect, a grocery delivery service that operates in the Big Apple, Philadelphia and Washington, D.C., metropolitan areas, partnered with Mastercard in April to use Masterpass-enabled bots to drive more seamless shopping via Facebook Messenger. The bots leverage artificial-intelligence technologies to let consumers interact with the New York-based e-grocer, build their order and securely check out via the Masterpass mobile payments app, all without leaving the Messenger platform.

Masterpass-enabled bots work across multiple verticals, from restaurants to retail, making conversational commerce frictionless while delivering a more personalized experience. The bots allow consumers to engage with brands in new places where they're already spending their time, as messaging apps and platforms such as Messenger currently represent many of the top 10 global apps used by billions of people worldwide.

In return, grocers need to let their fans respond in their own individual ways. Instagram is a great way to do this, and one grocer taking advantage in this space is AJ's Fine Foods, a banner of Chandler, Ariz.-based Bashas'. To kick off summer, the grocer – which operates in a region known for its scorching-hot summers – invites fans to cool off with its signature iced teas and rewards them for doing so: By posting a selfie taken while enjoying the iced tea and posting it to Instagram along with the #ajsicedtea hashtag, fans enter to win two iced teas every day for the rest of summer.

Good With the Bad

Authenticity and engagement go beyond the good times, however. No matter how beloved a grocer is, in the end, every business at some point has its detractors on social media. Proper communication – though difficult – can still bring these folks closer, or at least keep them from turning fans into foes.

"Nothing says 'I care' better than a quick response to a frustrated comment left on social media," Numainville assures. "Plus everyone else who sees that post will also see that the retailer is responding." Reasor's, based in Tahlequah, Okla., is one grocer that responds promptly to comments on Facebook, appearing both sincere and attentive.

Sainsbury's sets a good example here, too: Instead of leaving social media to the PR department – as retailers often do – it boasts a "very highly trained, creative set of folks" to "engender and create two-way communication," explains Fitzpatrick. While PR experts might handle negative comments the same way they handle negative press – off the wire – Sainsbury's has embraced transparency and responded to negative comments where they're placed, right in the open.

"It wasn't something you would take offline and call a different number to get a resolution," she says. "Part of the trend for social media within that customer service base is to resolve ... within the channel the customer expressed it in, both removing the barriers to engaging, but also being very transparent about the exchange in public."

Always remember, though: Be quick, but not aggressive. Speed and openness are the most challenging parts of social media, as criticism moves quickly.

"You have to handle it in the moment, and you cannot get defensive," advises Blue Goose's Lencioni. "Opportunity comes and goes in an instant, too – you have to be on time in social media. Be honest, open and available." **PG**



Nothing says 'I care' better than a quick response to a frustrated comment left on social media.

— Brian Numainville
Retail Feedback Group





The Organic Way of Life

Nature's Soul is an organic and sustainable grocery outlet that caters to consumers who are looking to incorporate healthy buying habits into their lifestyle. With an extensive product range consisting of gluten-free and vegan variants, the enterprise aims to bring back traditional and chemical-free methods of farming. Founder and Director Arjun Sahni speaks to Nimisha Gautam of Progressive Grocer about modern purchasing trends in organic and his outlet's sourcing strategy.

“Consumers now have enough information on chemicals, additives and insecticides/pesticides used in growing to make an informed buying choice.”

— Arjun Sahni
 Founder and Director,
 Nature's Soul

Briefly describe your company and its business operations. What was the idea behind setting up your own shops?

Being a mountaineer and an avid traveller, I have come across a number of people occupied in the agricultural industry growing the most salubrious produce in multiple regions of the country. Even subconsciously, I have noticed a large majority of farmers practising organic methods of growing and organic cultivation. My inspiration to open an all-organic neighborhood grocery store in the heart of a metropolitan city stemmed from the idea of localizing the tradition of organic living in city dwellers.

Tell us about the product range at your store across various categories.

As a full-fledged retail outlet, we cover a number of conventional categories that are important to today's buyer. The idea is to provide fresh organic produce to consumers looking to buy healthy items for everyday use. The product range includes organic fruits and vegetables, superfoods such as brazil nuts, cacao nibs and goji berries, staple dairy and grocery items and organic meat including turkey, prawns and duck, apart from other staple meats.

Who are your major clients and what demographics do you target?

We see an equal mix of Indian families and foreign nationals shopping at our store. Our most loyal customers include those who are organic and responsible consumers looking for the right price and the best quality in the organic market.

Which are the best-selling products in your portfolio?

The maximum contribution comes from fresh fruits and vegetables. Even as we see a rise in consumerism and the popularity of processed, ready-made consumables, nothing can replace wholesome vegetable laden meals rich in vitamin. It also helps that a number of consumers now think of fruit as a healthy snack.

How have the company and its products grown and evolved over the years?

Even though the company is a year old, there is a huge potential we are yet to tap into. We have tried including the best, most healthful products in our offerings. A customer can stop by at our store to pick up basic everyday items as well as exotic and

unconventional goods belonging to the organic foods segment. We also offer instant delivery and are focused on satisfactory customer service.

What have been the consumption trends for these products and what is driving their growth?

The consumption of organic products is drastically increasing in the Indian market. We have already seen an influx of locally grown, organic concepts in the Western grocery landscape and we too are moving in that direction. Food safety concerns are discussed openly and a lot more people are conscious of the quality of food they're consuming. Consumers now have enough information on chemicals additives and insecticides/pesticides used in growing to make an informed buying choice. Health problems are also on the rise in addition to lifestyle-related ailments caused by unhealthy eating. In my opinion, the tendency of the modern consumer to eat organic is a driving force.

What is the sourcing strategy for your products?

We only source from growers who adopt ethical standards in the farming industry and are committed to supplying all-natural produce with no traces of chemicals. We source our products at a price that enables them to be consumed by the masses at a reasonable market rate.

➔ **FACT BOX**

- Retailer/ Brand Name: Nature's Soul
- Launch Year: 2017
- Parent Company: AAAS Foods and Nature's Soul Pvt. Ltd.
- Company Headquarters: New Delhi
- Key People: Arjun Sahni, Founder & Director
- Retail format of stores: Organic and sustainable grocery store
- Number of stores in operation and where: One outlet in Defence Colony
- Total retail space under operation: 500 Sq. Ft.
- Operating model - company owned stores, leased or rented: Leased
- SKU count in stores: 5,000
- USP of the brand: Active promotion of an ethical, organic and natural way of life
- Strength of the company: Experience in the field organic food retailing



Are there any interesting concepts or innovations you have introduced at your stores?

There is a growing demand for gluten free and vegan products as consumer awareness and product specializations increase. However, there are a limited number of local retail stores that these product variants are available at. We understand the growing need of the consumer and offer a multifarious product line of such products. In addition to the introductions made to the product line, we have also contracted some land to grow our own organic produce on.

To procure fresh produce, we visit farms personally to inspect the entire cultivation process before we set up a supply chain.

What are your criteria for identifying new products and categories and your benchmarks for tying up with new vendors and suppliers?

We primarily look for certified goods matching our quality and hygiene benchmarks when it comes to packaged items. To procure fresh produce, we visit farms personally to inspect the farming methods employed and the entire cultivation process before we set up a supply chain.

What is your expansion strategy and what does the roadmap for the future look like?

The future of retail lies in making use of omnichannel mediums and strategies. We are looking to employ the same agenda in our business plan as well. We are also looking to foray into online retail, increase customer outreach and supply our organic products on a hyperlocal scale. **PG**



Practical Solutions

Grocers and CPG companies find success as they embrace the evolution of category management.

By Jim Dudlicek



Retailers aren't selling categories, they're selling solutions — that's a phrase we're hearing more often these days. "Maintaining relevance today means simplifying the shopper's trip — not by inundating them with more category choices, but by presenting disparate products as the holistic answer to an immediate need. Enter solutions management," Wendy Liebmann, CEO of WSL Strategic Retail, wrote in a recent edition of the New York-based marketing consultant's WSL Weekly Highlights.

With that, Liebmann declared category management as we've known it dead, urging that a solution-based approach rise from its ashes.

She's absolutely right. It's not enough just to sell stuff anymore, not with the fierce competition traditional grocery retailers face from physical and digital channels.

To compete, traditional retailers need to sell the "why" instead of the "what," because there's so many places to get things. That's likely why Cyriac Roeding, co-founder of digital shopping app Shopkick, based in Redwood City, Calif., thinks that, while "the future of retail looks really bright, the future of physical retailers looks really dark."

Even traditional retailers acknowledge this challenge. Steve Henig, VP of digital for Keasbey, N.J.-based Wakefern Food Corp., speaking at Nielsen CoNEXTions with Roeding, predicted that within a decade, some

center store categories like health and beauty care will be sold exclusively online.

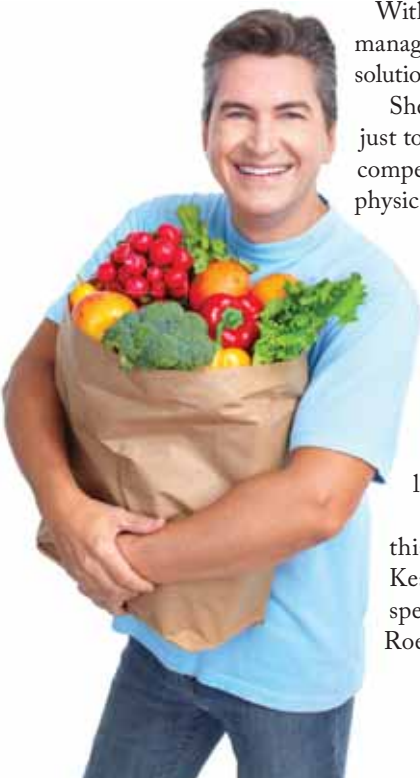
Creating experiential destinations will be key, and many retailers are doing so, for HBC and other categories, to give people a reason to go to the store.

"Consumers buy more than just food, they buy what it delivers and represents," remarks Andrew Mandzy, director of strategic insights for health and wellness growth and strategy at Schaumburg, Ill.-based Nielsen — exactly why retailers need to free themselves from the shackles of outdated category management practices and embrace the idea of shopper-centric solution management.

Shopper Solutions Planning

In early 2015, Food Marketing Institute (FMI) asked Winston Weber & Associates Inc. (WWA), supported by Deloitte Consulting LLP, to study the future role of category management. The study included more than 70 retailers and manufacturers, insights from global experts, and the collective experience of FMI, WWA and Deloitte in addressing merchandising challenges in the food, drug and mass-merchandising sector. This led to the report "From Category Management to Shopper-Centric Retailing."

"The grocery industry is experiencing the most dynamic change in years, with expanding food lifestyles, digital connectedness, a solutions focus, Millennials and more," says Win Weber, CEO of Tampa, Fla.-based WWA. "In this environment, category management has too many limitations to produce the desired results."



Weber notes that current category management processes focus narrowly on individual products or categories, rather than broader solutions. As a result, segregation often creates barriers to optimizing complementary merchandising and creating solutions designed to enhance the shopping experience.

As such, Weber asserts that “retailers have no choice” but to move toward a shopper-centric model, “if they are to remain distinct and relevant in the marketplace.”

By shifting the retailer-supplier collaborative focus to the shopper and shopping experience, he says, “the end result is improved sales and profits.”

As defined by its authors, the shopper-centric approach is driven by consumer insights. Encompassing the whole store rather than individual categories, it shifts the focus to consumer needs, determining how best to group related goods together to deliver on these needs. The process is designed to be adaptable to changing trends and shifts in consumer demands.

Implementing the approach requires the creation of a shopper solutions team structure administered by executive and store-level managers who collaborate closely with suppliers on how best to deliver on consumer needs.

Among retailers adopting the shopper-focused model is Williamsville, N.Y.-based Tops Markets LLC.

“Shifts in the types of food that people are looking for and large changes in market importance of the younger generational cohorts have put pressure on traditional retailers to meet the changing needs of buying consumers,” says John Persons, Tops’ president and COO. “As a result, new competitors have arisen, applying even more pressure. It’s a necessity for our industry to get to know its consumers in order to adapt.”

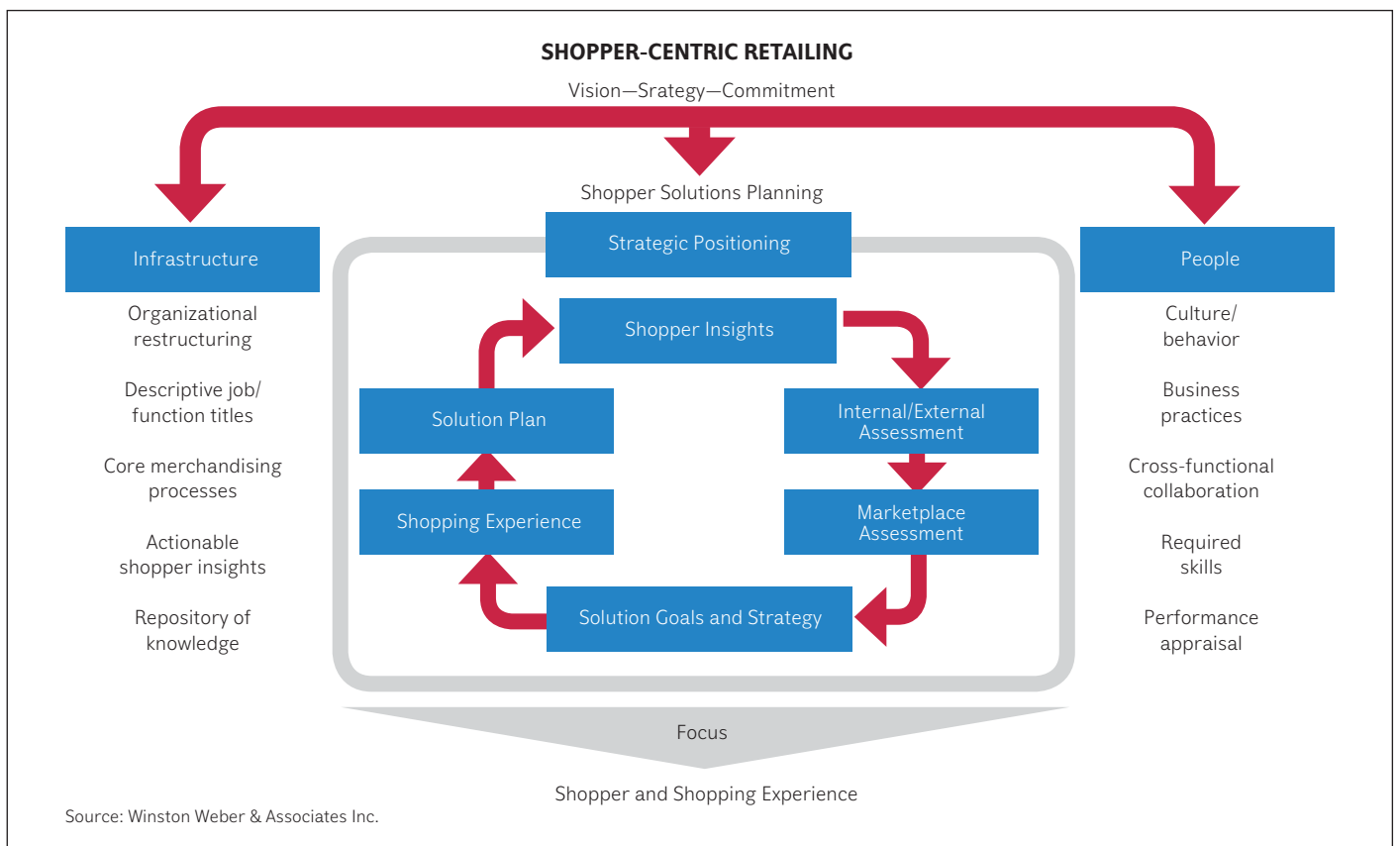
In Tops’ movement toward the new model, “we started by aligning behind the simple notion that we wanted to have data drive our decisions,” Persons explains. “We have an incredibly robust database of customers and their shopping history that we hadn’t really tapped into.”

Then Tops looked at its infrastructure and decided to pull together all of the analytical functions in the company under one umbrella. “Like most traditional retailers, all of our functional areas had their own analytics team: Marketing had consumer insights, merchandising had product data analysis, space planning and pricing weren’t linked in tightly, finance handled margin analysis, and so on,” Persons says.



Shifts in the types of food that people are looking for and large changes in market importance of the younger generational cohorts have put pressure on traditional retailers to meet the changing needs of buying consumers.

— John Persons
Tops Markets LLC



So the retailer created a “decision support” department that now services the entire organization. “It sounds easy, but the actual implementation took a year for the company to utilize the functions up to the potential,” Persons says.

A key element of this new capability, he notes, is aligning consistent measurements: “For instance, It’s no longer meaningful to simply look at lift of an item on promotion. Now we need to know household penetration, what demographic or generational cohorts engaged in the promotion, and what were the important affinity items. Our report cards look the same regardless of what we are measuring, and we now have a comprehensive view of our business.”

With its merchants, Tops stripped away all administrative functions that would distract from their focus on their product categories.

On the implementation side, Tops added key leadership positions that bridge the gap between merchandising and store operations. “They ensure seamless execution of the solution planning,” Persons explains. “Added to that, we created key promotions-planning roles that now effectively pull together input from the merchants and develop key events.”

Tops is also collaborating more closely with vendors. “In general, our goals are aligned and we now share data, insights and ideas at a higher level than in the past,” Persons says.

“The manner in which Tops has set up our support structure will allow us to have a comprehensive view of our customers’ behavior as well as improve our alignment with our manufacturer partners,” he adds. “Both of these elements will improve our flexibility and responsiveness to consumers.”

“
By deploying the core assortment principles, retailers can ensure they are maximizing their reach with assortment and satisfying a large portion of demand from shoppers.

— Adam Byrne
Anheuser-Busch



CatMan 2.0

The Category Management Association (CMA) has been rolling out the overhaul of its quarter-century-old guidelines to tap the reams of shopper insights that technological advancements have made easy to access. This new iteration, known as CatMan 2.0, has been covered at length by Progressive Grocer, most recently in its 2017 Category Management Handbook, available online at <http://magazine.progressivegrocer.com/i/758946-2017-category-management-handbook>.

CatMan 2.0 and Shopper Solutions Planning are similar in that they’re insights-driven and break away from old product-focused processes to develop ways to fulfill consumer need states. The ideas have aspects that are complementary; retailers can employ tactics from each that best help meet their goals.

Minneapolis-based CMA has been partnering with CPG companies to help them leverage CatMan 2.0 principles to develop customized solutions for their retailer partners. One of these partnerships has been with St. Louis-based brewer Anheuser-Busch.

A-B’s latest initiative, in collaboration with CMA and Chicago-based market researcher IRI, has yielded a process to identify the best assortment for retailers, based on local consumer demands.

“A-B and IRI have for the first time combined all the new external syndicated data with their internal proprietary data and breakthrough analytical models to develop this core assortment presentation,” says Gordon Wade, director of the CatMan 2.0 initiative for CMA. “It is gold standard.”

According to Wade, A-B presented a prime opportunity to employ CatMan 2.0’s best-practice process, because the company possesses high-value data and internal analytical resources.

“This A-B work is the finest work I have ever seen, especially in an incredibly complex category with hundreds of local craft beers, a growing import business and constrained cooler space, all of which varies by shopper and store clusters,” he says. “What the new IRI data and the new CatMan 2.0 process enable is remarkable. What’s really new here is the confluence of the process, remarkable data from IRI, and a well-led, determined and capable organization.”

A-B’s Balanced Portfolio Approach, an overarching strategy to drive growth by leveraging all segments within the category, evolved into Your Balanced Portfolio Approach, which was the framework to identify the winning elements that top-performing retailers were deploying, explains Adam Byrne, the brewer’s VP of category leadership.

“The core assortment study is essentially the way to apply the Balanced Portfolio Approach,

and evolves even further to identify the items in the category with the highest rate of sale and unique demand,” Byrne says. “By deploying the core assortment principles, retailers can ensure they are maximizing their reach with assortment and satisfying a large portion of demand from shoppers.”

The core assortment project encompasses many aspects of CatMan 2.0 to address “why” and “how” shoppers are purchasing beer in the store. “The inclusion of the behaviors, attitudes and perceptions of shoppers in the project helps ensure growth for the entire beer category,” Byrne notes.

Working with CMA and IRI, A-B identified four unique store clusters with common shopper demand patterns: value, premium, import and craft.

Leveraging shopper data and CatMan 2.0 guidelines, A-B helps its retailer customers optimize their beer assortments in every store by



identifying their “must-have” core items available nationally. On this foundation, retailers add critical regionally relevant and purely local items that provide incremental sales and variety for an optimal assortment, store by store.

This approach optimizes the retailer’s alignment between the beer category and store strategy, ultimately driving total beer category performance across the grocery channel.

“As retailers are faced with expanding categories, it is important for them to understand the impact

of expanding item counts within categories, and the impact on total category efficiency,” Byrne says. “By understanding the core assortment philosophy, retailers can better plan assortment by focusing on the items with the highest velocity and unique demand, while offering a balanced assortment to meet the varying needs of all their shoppers.” **PG**

The Category Management Association (CMA) has been rolling out the overhaul of its quarter-century-old guidelines to tap the reams of shopper insights that technological advancements have made easy to access.



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“Bakers are very selective today about the fats they use”



Deoki Muchhal
MD, Cargill's food
business in India

Deoki Muchhal, Managing Director of Cargill's food business in India, speaks to Progressive Grocer about the trends and developments that are shaping the bakery industry in India and the opportunities it presents for manufacturers and retailers.

What is the current status of the bakery industry in India and how do you look at its future prospects?

The bakery industry today is evolving rapidly and it is currently a fusion of traditional products with western bakery concepts. With end consumers becoming increasingly important, the focus is on creating good experiences for them by increasing the touch points for greater engagement – be it in the form of cafes or mini eateries or even departmental stores, which allows for sampling and offering all meals of the day. Consumers are more conscious than ever before, and this has resulted in greater demand for quality ingredients, including fats besides making bakers more conscious as well.

Which consumption trends in the bakery category would you like to highlight?

Baked goods have always been popular among the consumers, especially breads and cookies as they are readily available and easy to consume on the go. The consumption of bakery goods depends majorly upon the availability, flavor, health quotient and innovation. As consumers are becoming more curious and open towards food experimentation, the consumption of baked products has increased manifold. Now, if you observe, one-third of any sweet shop is now filled with baked goods. Thus, artisan bakers have a wider platform to showcase new techniques and expand their consumer base. Seeing this growing trend, home bakers and bakery outlets have also increased in the country, in the last few years.



How do you see the bakery market in India developing for value-added products?

The bakery industry in the country is witnessing a growth of 12-15% per annum. Today, with close to 50% of the country's bakery segment being with artisan bakers, they want to experiment with their skills and develop new techniques, which will give them the liberty to provide something different to the consumers.

Where do you think are the future opportunities for manufacturers and retailers in the bakery segment?

Bakery products, due to their high nutrient value and affordability, are items of huge consumption. The high demand provides an opportunity for the manufacturers to experiment with flavors and techniques to create more products. The Indian bakery industry is one of the biggest sectors in the country's processed food industry. Thus, in terms of increasing the business, the bakery sector is taking gradual steps towards the future of the segment. The



innovations, for instance, introducing bakery fats, shortening or margarines, are some of the important steps that we are taking in the industry.

Which factors play an important role in this category's performance?

With health becoming a priority and the number of discerning consumers increasing at a fast pace, the focus is on quality ingredients that provide a good experience. In this scenario, the choice of fats is becoming increasingly important as it affects the mouthfeel and texture. Bakers are very selective today about the fats they use as it plays an integral role in the overall experience when consuming products – whether it is cake, cookies, puffs, kharis, etc.

Any suggestion for brands and retailers by way of introducing new product features, more value addition, etc. that would give more traction to the category?

Analyzing the demand of modern consumers as per their lifestyle and matching the supply as per the requirements will not only gain traction but also inspire the manufacturers to push the envelope further. The bakery industry has a lot of potential to expand their business; we just need to focus towards the demand of the consumers, gauge what they like and provide solutions matching their likings.

Tell us about the role played by your company in raising the benchmarks for the bakery industry in India and in contributing to its development?

Cargill's major goal is to nourish people in a safe and

sustainable way. This reflects in our offerings across brands. Our contribution to the bakery industry is through our brand NatureFresh Professional, whose shortenings and margarines and technical support from the application center based out of Gurgaon, provides a complete solution to its customers. Under NatureFresh Professional shortenings, we have NatureFresh Professional Classic for puffs & kharis and Elite for cookies. Under margarines, we have NatureFresh Professional Champion, Genius, and Master. Finally, in Specialty, we have NatureFresh Professional Lite, which has been giving brilliant results in cakes and cookies. As a brand, we are constantly innovating and looking at expanding our product portfolio with newer variants, all aimed at adding value to bakers and allowing them to make quality products while continuing to delight consumers.

As a company, what are your future plans for bringing newer technology and solutions to the bakery segment?

Cargill is constantly looking at newer avenues for engaging with bakers and customers. Fueled by the objective to enhance value creation, educate bakers by increasing their knowledge and acumen while partnering with them to create quality products, the brand is constantly engaging with bakers, customers, and even consumers. With consumers becoming increasingly particular about the products they consume, the brand also engages with bakers to increase their consciousness and awareness on the importance of food safety and hygiene conditions to cater to these consumers. **PG**

The bakery industry in the country is witnessing a growth of 12 -15% per annum. Today, with close to 50% of the country's bakery segment being with artisan bakers, they want to experiment with their skills and develop new techniques, which will give them the liberty to provide something different to the consumers.

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