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International term

GOAT MEAT

CHEVON (French Derived Word)

MUTTON

SHEEP/LAMB

Nutrient Facts

PRODUCTS	CALORIES	FAT	SATURATED FAT	CHOLESTEROL	PROTEIN
GOAT MEAT	143	3.03	0.930	75	27.10
CHICKEN	165	3.57	1.01	85	31.02
SHEEP/ LAMB	290	21.12	9.080	93	23.27

100g Servings' comparison

Source: USDA National Nutrient Database for Standard Reference



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Retail Insight

To position themselves for success, retailers need to pay more attention to customer focused initiatives

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Grocery chains need to deliver on sustainability goals by strengthening their long-term green vision

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Why retailers need to deliver a seamless experience that is in sync with the consumer's journey in the marketplace

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PROGRESSIVE GROCER

October 2018 · Volume 12 Number 10 · Rs 100 · www.indiaretailing.com **INDIA EDITION**



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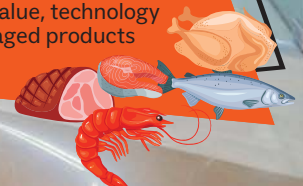
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SHASHWAT GOENKA
SECTOR HEAD, SPENCER'S RETAIL LTD
RP-SANJIV GOENKA GROUP

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MEAT & SEAFOOD

As consumers want convenient meal solutions, they are going for high value, technology oriented, branded packaged products



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The emergence of Modern Trade and E-commerce has made it easy to be a single product company and has fostered innovation and entrepreneurship. Launching a new FMCG product is no longer the domain of multinationals or big players with financial and distribution muscle. Small and medium enterprises that were previously deterred by the huge capital investments required for distribution networks while launching new products can now easily develop and bring their products to the market in a cost effective manner. This has had a profound effect on the number of launches of innovative products in the market.

Quinoa puffs, butter spreads, health and energy bars, pasta kits, packaged ready to cook idli/ dosa batters, raw juices, water based functional beverages are all excellent examples of new age products built and marketed by small companies being widely accepted by the consumer base. Milk and value-added milk products too are increasing their share and we envision this trend to become stronger in the times to come.

This shift towards fats and proteins from the traditional intake of carbohydrates is the biggest food consumption trend, which cannot be missed. It can also be seen as the reflection of the dietary habits of a younger India. As enablers in the consumer's shopping journey, recognizing and translating these trends into viable business opportunities remains a key concern for manufacturers and retailers today.



Amitabh Taneja
Editor-in-Chief

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COVER STORY

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“Spencer’s wants to become the most profitable retailer with lucrative expansion through hypermarkets and small format stores”

Spencer’s Retail is one of the earliest entrants in the retail space in India, and currently runs 138 stores across 36 cities in both large and small formats. The retailer takes pride in constantly innovating to expand its offerings. Says Shashwat Goenka, Sector Head, Spencer’s Retail Limited, “Consumers view us as being synonymous with quality and, hence, from being their preferred food destination, we have now extended a similar offering in the non-food space with categories like apparel and general merchandise.”



CATEGORY WATCH

Meat & Seafood

30

The Meat of the Matter

A young demographic, rising disposable income and time-pressed urban consumers looking for convenient meal solutions without compromising on health aspects are the factors driving the market for meat and seafood. But brands need to differentiate and offer value-added products. They need to constantly innovate on the product front and price their products in a manner that makes the consumer appreciate the value in terms of taste, flavor, and convenience.



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TIMELESS QUALITY. MATCHLESS PRICE



- ◆ Hazelnuts
- ◆ Macadamia Nuts
- ◆ Dates Medjoul
- ◆ Dehydrated Fruits
- ◆ Dried Cranberries
- ◆ Dried Blueberries
- ◆ Black Currants
- ◆ Pumpkin Seeds Kernels
- ◆ Sunflower Seeds
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Turbulence Ahead in Retail and the Importance of Being Customer Centric

By **Neeraj Gehani**



The retail industry is witnessing seismic changes due to multiple forces at play – competition from online players such as Amazon and discounters; customers expecting seamless omnichannel and new in-store experiences; advent of shopping assistants such as Alexa and Google home. Some of the key trends in the industry are:

- Time-strapped customers are seeking convenience in their shopping as well as looking for differentiated and personalized in-store experiences.
- Retailing is increasingly becoming omnichannel and customers want seamless experiences across

channels. More and more customers are checking the products in-store and ordering online or are buying in-store and expecting delivery at home.

- Players such as Amazon are leading a paradigm shift in customer expectations through one-click purchasing, offering endless choice with reviews from other customers to facilitate decision making, and the ability to return the products if they don't like it.

Customer is still king

While everything changes, what remains constant is the fact that 'customer is still king' and the retailers

who ignore this fact run the risk of getting extinct sooner or later. Retailers need to think about levers which can help them win in this competitive era of razor thin margins.

Given the scale and complexity of their operations, it is easy for retailers to become more and more focused on their processes and lose focus on their most loyal and profitable customers who typically account for 80% of their sales. To be successful in future, retailers need to put the customer at the centre of all their decision making. This is easier said than done, given the existing legacy processes, focus on day-to-day execution, and not to forget the prevalent mind-set and culture.

Some retailers have started to realize the headwinds impacting their business and have started taking steps to position themselves for success. For example, Walmart recently hired its first Chief Customer Officer to oversee all customer focused initiatives both online and in Walmart stores.

Role of data science and machine learning

The role of leveraging customer data is becoming more and more important and one of the key differentiators of the “winning retailers” of tomorrow will be their ability to use data to guide their decision making. Today, retailers have a huge variety and volume of data available within their ecosystem in the form of transactional data, media viewing behaviour, location data, weather data, click-stream data on website and retailer/ third-party apps. The key is to have this data made available for decision making processes such as supply chain management, in-store assortment and operations, marketing investment optimization, managing promotions, etc., in the right format, at the right time, and to the right people with the necessary skill-sets.

Some of the key areas where data science and machine learning can help retailers include:

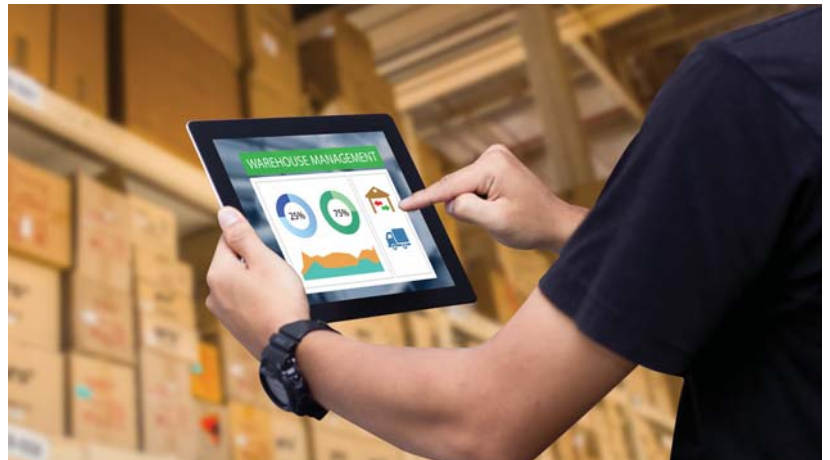
- Generating real-time and actionable customer insights to drive personalization and enhance customer loyalty.
- Optimizing in-store operations including assortment decisions, product placements, ensuring product availability, and reducing check-out time.
- Shifting marketing investments from mass-marketing to personalized one-to-one marketing.
- Mapping customer journeys across offline and online channels and ensuring seamless omni-channel experience.

Getting ready for the future

The business case for leveraging data to become customer-first in the retail industry is clear. This will enable retailers to unlock the hidden value of data sitting in their data ware-houses. Companies such as Amazon have been pioneers in leveraging data science and machine learning to grow their business. The retailers will need to raise their game by multiple notches, to sustain and win in the omni-channel world. To be able to effectively leverage the full benefits of data science and machine learning in the future, retailers need to adapt to the big technological, people and cultural changes within their organizations. Some of the key areas that will need focus are:

- Building a culture of data-based decision making and continuous experimentation rather than using intuitions or old ways of doing things.

The role of leveraging customer data is becoming more and more important and one of the key differentiators of the “winning retailers” of tomorrow will be their ability to use data to guide their decision making.



- Revamping the underlying data infrastructure to ensure that data from all sources is combined on a real-time basis to get a 360-degree view of the customer and is leveraged actively for decision making.
- Hiring/ Partnering to get the right skill-sets for the future. For example, marketers who are creative as well as comfortable with numbers; data scientists/ analysts to build machine learning models and generate actionable insights.

The change is already here for the retail industry and the ones who are well prepared for the future will eventually emerge stronger. **PG**



The writer is Analysis Director, dunnhumby.

Off the Shelf

With fresh meal kits rapidly catching on, manufacturers hasten to remind consumers of convenient, inexpensive center store alternatives.

By Bridget Goldschmidt

No doubt about it: Meal kits are growing in popularity. From their beginnings as items ordered over the internet and delivered to consumers' doorsteps, they've migrated to grocery store shelves, with retailers such as Kroger and Publix offering their own versions. Makers of certain shelf-stable products, however, want shoppers to know that there are other ways to whip up a meal with a minimum of fuss.

"The ability to stock up, and to keep product on hand for a quick weeknight meal, is a need that isn't going away, and meals with brief shelf lives simply can't help with that," points out Mike Siemienas, spokesman for Minneapolis-based General Mills, maker of the Helper lines of packaged meals that perhaps collectively represent the granddaddy of shelf-stable meal solution concepts, to which a protein such as beef, chicken or tuna is designed

to be added. "Hamburger Helper and other boxed dinners offer consistency and convenience that busy families have come to rely on."

The company continues to improve its Helper and Suddenly Salad offerings, according to Siemienas, by "now using 100 percent real cheese in our Helper cheese varieties, for instance, and all of our top-selling Helper products are free of artificial flavors and colors from artificial sources. Moving forward, we will continue to introduce new flavors and sizes to appeal to a broader range of consumers." General Mills has also upped its price promotion spending and is working with retailers "to plan more robust display and on-pack offerings," he says, adding, "We've also focused more on social media and experiential marketing to better reach the Millennial consumers, who are increasingly attracted to the reliable flavor and convenience of brands like Helper."



WHAT'S FOR DINNER

Campbell provides easy recipes for its Swanson and Prego brands.



Keeping it Simple

“Many of our Campbell shelf-stable meal solutions are designed for convenience, simplicity and ease, while fresh meal kits may require more engagement with prep, a greater time commitment, and can vary in serving size and investment,” notes Rebecca Poolman, senior marketing manager, U.S. retail, meals and sauces at the Campbell Soup Co., based in Camden, N.J. The company knows something about the meal-kit space, having recently “entered a strategic partnership with Chef’d, which allows us to partner on fresh meal kits and test and learn with an experienced online meal partner,” as Poolman puts it.

That doesn’t mean that Campbell has given up on shelf-stable meal options, however — far from it. The company introduced 11 varieties of Ready Meals for the Prego, Pace and Campbell’s brands in 2016, and launched Organic SpaghettiOs this past August, while its “on-label Prego recipes offer additional inspiration and convenience when creating a family-friendly meal by clearly laying out what’s required [in] ingredients and time,” says Poolman.

“Our meal solutions are created to make things as simple as possible for our consumers when they’re trying to plan for the dinner occasion, and we’ve tried to use a similar approach with our merchandising,” she continues. “To aid our customers (retailers), we’ve created a video that provides high-level detail from our consumer research and highlights meal solution options across our entire product portfolio that consumers can access through a variety of ways.”

Making a move similar to Prego’s is Fort Worth, Texas-based Renfro Foods, whose salsas, including such specialty flavors as Craft Beer, “come with easy-to-use recipes on the label [and] add value to healthy



meal preparation, serving as a flavor booster and saving consumers time and money,” according to President Doug Renfro. He adds that the company “has been using coupon machines, smartphone coupon apps and, more recently, shelf talkers, as well as an email blast to about 500,000 in the Northeast” to help sell its product line.

Bold Customization

In common with most of its CPG counterparts, Chicago-based Kraft Heinz has delved into the prevailing

“macro trends” to understand what consumers require of meal solutions. As a result of this investigation, the company’s head of meals, Jessica Gilbertson observes that “one insight we know is that consumers are eager to create a delicious meal for themselves, but have a demand for more convenience. We can focus both current portfolio positioning and future innovations to excite the consumer around how our category can play into this need. One example would be a solution that allows consumers to customize their meal at different levels, providing them the option to add more, while also giving them the chance to create something quickly.”



The ability to stock up, and to keep product on hand for a quick weeknight meal, is a need that isn’t going away, and meals with brief shelf lives simply can’t help with that.

— Mike Siemienas
General Mills



SAMPLE SALES
Cucina & Amore spurs trial of its shelf-stable meal solutions by holding in-store product tastings.

Last February, Kraft Heinz launched within its Cracker Barrel brand portfolio the Cracker Barrel Oven Baked product line, which Gilbertson believes “can lead in driving such trends within the shelf-stable category.” Featuring hearty macaroni crafted to hold the bold Cracker Barrel cheese sauce, the item allows home cooks to “customize the experience by adding our custom spice mix, placing the dish in the oven and baking the pan to perfection before finishing it off with crispy, crunchy breadcrumbs.”



→ COKE AND A MEAL

Coca-Cola may be the world's biggest beverage company, but it's interested in enhancing all center store sales.

"It's true that meal solutions are key to making busy shoppers' lives easier while growing basket sizes, but not all meal-bundling solutions need to be found in the perimeter," says Ron Hughes, senior manager of shopper strategy and innovation at the Atlanta-based soft-drink behemoth. "As large stores fight to remain relevant in an ever-changing retail landscape, The Coca-Cola Co. is committed to helping retailers re-energize the center store. And while the center aisles are declining — research shows an \$8 billion dollar gross profit decline from lost trips to the center store — 75 percent to 80 percent of all grocery bottom-line profits are contributed by the center store."

According to Hughes: "To drive more traffic and sell more shelf-stable meals, we first recommend retailers give their center store aisles a face lift. Shoppers, especially Millennials, seek an interactive and personalized experience as they enter retail environments. We ask our [retail] customers to consider how the design of

the center store can attract and convert shoppers. Along those lines, research shows that Millennials are always looking for ways to highlight their inner chef, try new recipes and take their meals outside of the box. We recommend creating bundle offers that bring together new flavors and innovative beverages that shoppers crave."

Acting on research revealing that 46 percent of shoppers want help from retailers in making simple recipes, Coca-Cola created several kinds of bundle-offer messaging with its retail customers through partnerships with snack and meal providers. "One bundle offer that is ideal for center store is what we call 'ready-to-create' meals," explains Hughes. "These bundles bring together key ingredients and a recipe to help busy shoppers get in and out of the store with a meal they can make at home."

A recent example of this bundle type was a partnership with Horsham, Pa.-based Bimbo Bakeries USA to offer Ballpark Hot Dogs and Hamburgers for National Hamburger Month in May and National Hot Dog Month in July. "The merchandising solution included hamburger and hot dog



buns, and the products shown to pair well with these meals," notes Hughes. "In this case, it was Coca-Cola and Gold Peak Tea."

He adds: "As we're entering this new age of retail, we urge customers to create engaging in-store solutions to drive more traffic. We recommend increasing the amount of well-known brands and making the center store aisle more colorful by positioning products in blocks by their brand. We've also seen retailers sell more packages by using unique lighting techniques in the shelving units."

In-store tactics aside, Hughes also cautions that "retailers shouldn't ignore ecommerce and should consider ways to better integrate with click-and-collect and delivery options."



Consumers are eager to create a delicious meal for themselves, but have a demand for more convenience.

— Jessica Gilbertson
Kraft Heinz

When it came to merchandising, the company opted to be just as bold. "The first strategy we implemented was to create packaging that was truly disruptive on shelf," explains Gilbertson. "We chose to put the pasta and all of the ingredients in a film bag, compared to traditional boxes typically found in the category. While that allowed the product to pop on shelf, we needed to ensure consumers' continued interest in the shelf-stable meal aisle. To do this, we utilized shelf talkers to catch shoppers' eye when they were in store, and couponing to drive trial."

Eat on the Go

Another important consideration is that it's not just about the dinner occasion: Center store meals can go anywhere and be eaten anytime. "Shelf-stable meal solutions like our Quinoa Meals are convenient because you don't have to worry about refrigeration," says Laila Banejad, director of media relations at Richmond, Calif.-based Cucina & Amore. "You can keep it in your desk at work or in your pantry, and

eat it when it's most convenient for you, rather than second-guessing ... whether or not it's still good to eat." This autumn, the brand is adding three varieties of Farro Meals, featuring a combination of cooked farro and red and white quinoa, to its lineup.

Banejad offers the opinion that "shelf-stable meal solutions can compete by offering healthy, all-natural ingredients that taste delicious without extra preservatives and unnecessary additives, and by [being] affordable."

In fact, despite the rising prevalence of fresh meal kits at ecommerce and now in supermarkets, manufacturers are optimistic about further demand for nonperishable options. General Mills' Siemienas says that "by continuing to find ways to offer easy dinners at an affordable price, shelf-stable meals will stay relevant for the foreseeable future," and Kraft Heinz's Gilbertson notes, "While we recognize that kitchens are evolving, [there] will always be a place for shelf-stable meal solutions with a variety of households and consumers." **PG**



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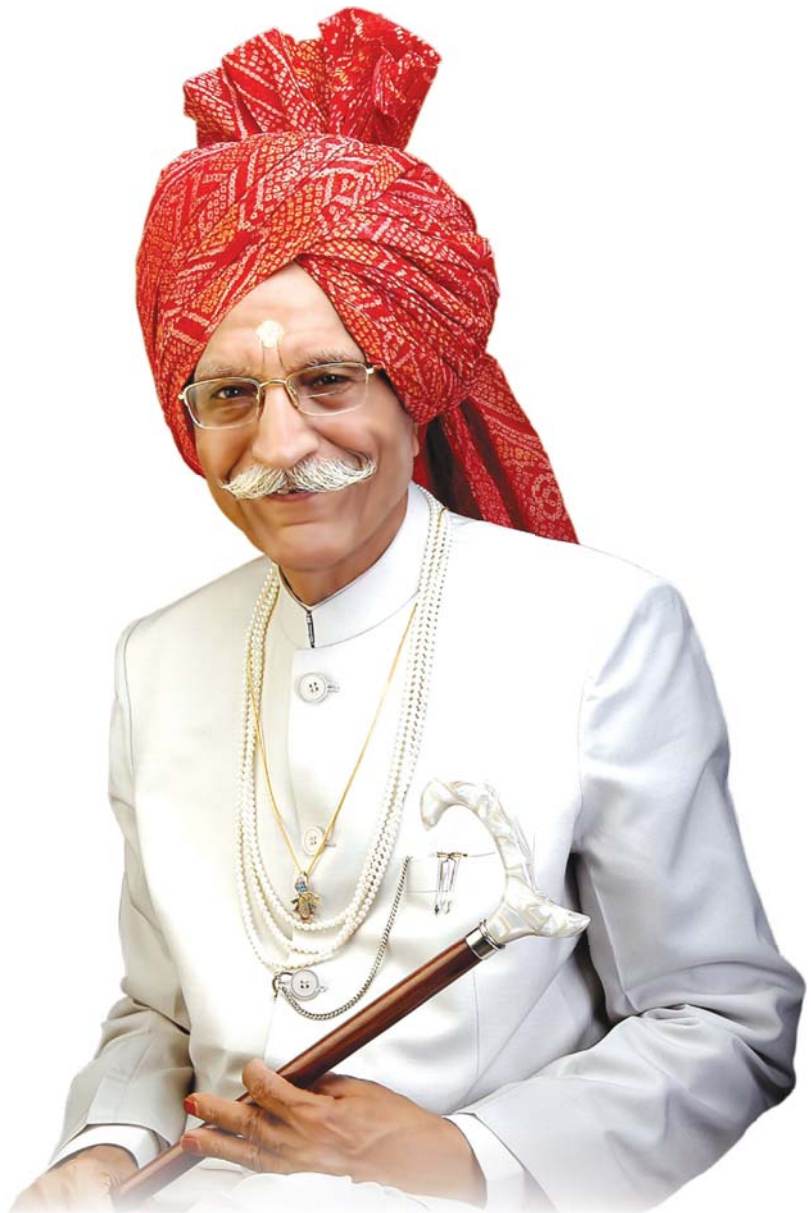
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“The success of MDH provides me the zest to devote myself to the service of humanity”

Mahashayji Dharampal Gulati, Founder and CEO of Mahashian Di Hatti (MDH), shares his thoughts on the essential attributes and traits of being successful in business and his philosophy of life and work.

By Premjit Mohapatra



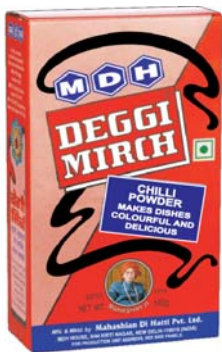
What is the secret behind your success and zest for life?

In life, irrespective of the choice of your profession, you need the support of your family and friends to succeed. We live in a society and are part of a highly interconnected, collective and cooperative community. Success in any field just isn't possible alone; rather it is dependent on support and collaboration from others. These can be partners, employees, conscious collaborators besides having a strong and stable infrastructure to work and grow. Simply put, no one is an island and no single person can survive without the support of fellow human beings. Just as multiple beads carefully and harmoniously strung together make a resplendent necklace that enhances the beauty of the neck, similarly our capability and effectiveness flourishes when we connect with society. The string of

successes that MDH has forged fills me with zest and provides me the vigour to devote myself to my people.

Which attributes have helped you build a successful career as India's best known spice tycoon?

My involvement with business started when I was still a child. At an early age, I joined my father in his spices business. My close interface with running the various facets of business made me realize the effectiveness and value of working together in a collaborative spirit. It also taught me about the myriad struggles of going it alone. I am a firm believer in teamwork and its efficacy as a game changer. To be honest, since the inception of the company, I have seen myself as the captain – responsible for all the decisions and equally



accountable. And I take immense pride in the fact that MDH spices is the undisputed leader in North India with more than 70% market share and one of the biggest brands of spices manufacturing almost 50 different types of spices. It's incredible that we have managed to be market leaders for a long time; and I consider it the grace of Almighty that he has bestowed in me the unique ability to identify the right talent, assign them right roles and get the desired results. Besides assembling the team, I ensure that each individual has a clear understanding of their responsibilities. Great emphasis is laid on cultivating a workplace environment that fosters a great sense of belonging and trust.

How do you look at success? Does your success motivate you to keep working even at this age when most people would have preferred to retire long ago?

I believe that success means achievements that make us popular and help garner the appreciation of our customers. Only those achievements that are to the good of society and end up benefiting humankind qualify as success in my book. Actions that are backed by good intentions are often successful and help us lead a contented life. It's my belief that good intentions geared to the benefit of all result in good results. If our intentions are not noble and corrupted by malice, then no matter how much and how hard we strive, success will elude us.

And if the result of your honest intentions combined with hard work is immense success and



wealth, then consider it a blessing and indulge in charity to improve the lives and conditions of the impoverished and needy. Great seers have informed us that true happiness flows from making others happy. So devote your life, energies, and resources to making others happy and making a positive impact on society. That, to me, is being successful in life and that is happiness at its best and lasting. This is what energises my body and spirit and inspires me to keep moving forward and to newer heights.

Apart from your work and business, which are the other things close to your heart?

Apart from my business, my faith in service is very close to my heart and I consider it a form of worship. As we know service to man is considered to be at par with the service to God. All the great men that have walked the earth were dedicated servants of society and it's that spirit of sacrifice for the betterment of society which made them great and immortal in our memory. Even in contemporary times, people who have distinguished themselves and made a name for themselves are well known for their spirit of service and charitable endeavours.

Ever since I developed an understanding of the world, service has been the central theme of my life. It started with serving my parents at a young age and soon went to include the people I came in contact with and gradually the community itself. If I had to sum up my life and ideal then it would be "service of mankind is service to God" and that selfless service for the cause of humanity is as important as worship to God.

What advice would you offer to young entrepreneurs wanting to make it big in the spice business?

Develop and nurture the qualities of honesty, integrity, kindness, generosity and hard work. These characteristics are the major determinants of success. If you want to follow in my steps, then inculcate my six prescriptions: Honesty, hard work, sweetness of speech, the grace of God Almighty, blessings of parents and love for your people and society. **PG**

I take immense pride in the fact that MDH spices is the undisputed leader in North India with more than 70% market share and one of the biggest brands of spices manufacturing almost 50 different types of spices.





“Spencer’s wants to become the most profitable retailer with lucrative expansion through hypermarkets and small format stores”

Spencer’s Retail is one of the earliest entrants in the retail space in India, introducing consumers to the concept of organized retailing. The aspirational food retailer currently runs 138 stores across 36 cities in both large and small formats. As a consumer-centric company, the retailer takes pride in constantly innovating to expand its offerings. Says Shashwat Goenka, Sector Head, Spencer’s Retail Limited, “We are focusing on strengthening our non-food portfolio and improving the shopper’s experience in the food range. Consumers view us as being synonymous with quality and, hence, from being their preferred food destination, we have now extended a similar offering in the non-food space with categories like apparel and general merchandise.”



SHASHWAT GOENKA
Sector Head, Spencer’s Retail Limited





More recently, Spencer's omni-channel business, www.spencers.in, and its foray in fashion with 2Bme range of apparel for men, women and kids, has been highly accepted and appreciated by its customers, which ties in with its mission of "delighting the consumer" by creating a 360 degree memorable brand experience. It is also aiming to grow and strengthen its retail network in the north, south and east of India. "Over the years, Spencer's has been able to recognize the needs and aspirations of the customers in the specific geographies it operates in. They are looking for an international shopping experience at Spencer's. Thus, we have been focused, innovative and protective while catering to the organized retail market. With this approach, we have matured and evolved as a retailer and it has given us the chance to grow and preserve our strong customer base," observes Goenka, in an interview with *Progressive Grocer* with whom he shares his vision and future roadmap of Spencer's.

What is the customer proposition and marketing positioning of Spencer's store chain?

Spencer's Retail's brand proposition "Makes Fine Living Affordable", promises a great shopping experience to the customers. We offer a wide range of assortment from every category – fresh fruits and vegetables, staples and grocery, fish and meat, bakery items, beauty and personal care products, apparels,

electronics and electrical items, and home essentials – to cater to the needs of all. With more than 25,000 SKUs (stock keeping units), we are in tune with our customers' "fine living" quotient, which also generates an experiential shopping journey at Spencer's. Currently, Spencer's runs 138 stores across 36 cities in two retail formats – large and small.

Our brand proposition personifies Spencer's philosophy of delighting the shoppers with the best products and services by empowering shoppers to make smart choices. Spencer's key USP is to focus on customer-centric innovations under one roof, with an experiential play. More recently, our omni-channel business, www.spencers.in, and our foray in fashion with 2Bme range of apparels for men, women and kids, has been highly accepted and appreciated by our customers.

"Delighting the consumer" by creating a 360 degree memorable brand experience is what Spencer's aims for. Today, consumers are highly stressed, so shopping should be enjoyable and engaging. Therefore, rather than choosing to play the price game, Spencer's focuses on establishing itself as the preferred shopping destination for young customers looking for an extensive range of quality products and a global shopping experience.

Spencer's has been able to create a brand promise with its retail design strategy. This has evolved to cater to the well-travelled and globally exposed new-age shoppers seeking an international experience at the store level. Our vision of providing a fine living at an affordable price is translated through our store

With more than 25,000 SKUs (stock keeping units), we are in tune with our customers' "fine living" quotient, which also generates an experiential shopping journey at Spencer's. Currently, Spencer's runs 138 stores across 36 cities in two retail formats – large and small.

design as well, which our consumers appreciate each time they visit the store.

Shopping at Spencer's is a visual treat, enhanced by "Heritage Wall" that tells the Spencer's history, curved signage featuring the signature "Makes Fine Living Affordable" tagline, and category-specific color arches suspended over zones and departments to provide visual relief and act as navigational aids. This has also abetted Spencer's to become a world-class hypermarket retailer from being just another grocery retailer.

Spencer's has been redefining the Indian retail landscape since 1863 and, with the changing shopping trends, the consumer has always been able to find Spencer's at a convenient location. Even now, after more than 150 years, Spencer's still continues to inculcate the same kind of trust and patronage among its millions of consumers across India.

Spencer's has taken a dedicated approach using advanced tech-based solutions. It has carried out significant development in Enterprise Resource Planning Integration with high volume suppliers to ensure timely replenishment.

What is your location strategy of Spencer's stores? Which locations do you prefer and what part do they play in your store sales?

The location strategy of Spencer's Retail is to expand the store presence in clusters within our existing geographies. We generally prefer locations that have a 360 degree catchment with potential customers who aspire to get quality products at an affordable price and wish to experience a world class shopping environment. Currently, our focus is in the north, south and east of India.

Did you carry any major course correction or makeover of your business in the past? If yes, what has been the result of such reformatting?

The success of Spencer's has been built on four pillars – choice, price, quality, and service. Since past year,



SPENCER'S FACT SHEET

Retailer/ Brand Name: **Spencer's Retail Limited**
 Launch Year: **The brand dates back to 1863**
 Parent Company: **RP-Sanjiv Goenka Group**
 Operating Structure of stores – Company owned/ rented/ leased: **Rented**
 Average Size of Store: **Different formats ranging from 1,000 sq. ft. to 30,000 sq. ft.**
 Number of Employees: **Approx. 5,500**
 Total Number of Stores as on date: **138**
 Presence in Number of Cities as on date: **36**
 Annual Turnover in Rs. Crore: **Rs. 2,091 crore (FY 18)**
 Average Sales Per Sq. Ft: **Rs. 1,416 (FY 18)**
 SKU (Stock Keeping Unit) Count in store: **More than 25,000**



Spencer's is majorly emphasizing on strengthening its non-food portfolio along with improving the shopper's experience in the food range. We have elevated consumer experience and engagement in categories like apparel with the success of our 2Bme fashion range and enhanced the product range in our General Merchandise and Electronics department. Our aim is to consistently give customers something new to experiment with while shopping at Spencer's. Also, we have realigned most of the categories in terms of the "catchment needs". The backend of "fresh and staples" has been further strengthened to deliver freshness, quality, and availability of the products.

As a course correction, Spencer's closed down loss-making stores in some of the regions and started realigning the geographies we are currently present in. We have also set up Distribution Centres in each region.

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→ RETAILING MILESTONES OVER THE YEARS



Major breakthroughs in the past year:

Spencer's has been redefining the notion of modern trade since its inception. In Indian retail, Spencer's started the concept of compact hyper-format a few years back and this has become a differentiating element for Spencer's vis-à-vis its competitors. The focal point of this format was to utilize each square foot of space keeping the expensive cost of real estate in mind. Per square foot sales and profitability were the key drivers of this concept. Currently, 80% of the Spencer's store space is in large format. In FY 18, it became profitable at the PBDT (Profit Before Depreciation and Tax) level.

Supply chain innovation: Spencer's Retail, over the past year, has ramped up key areas of supply chain control for its food and grocery retail business. The key innovations include, EDI (Electronic Data Interchange), which has helped Spencer's achieve accuracy in data exchange by increasing the fill rate and has also improved TAT (turnaround time) of logistics by lowering down the cost of stationary and manual labor. The introduction of Advance Shipping Note is another major breakthrough in its supply chain management. In this process, the invoice of suppliers gets converted through the system automatically and documentation time gets shortened significantly. Its WMS (Warehouse Management System) has been also rolled out effectively to increase efficiency parameter in picking and dispatches while keeping the cost at lower level.

E-commerce/ omni-channel initiatives:

Spencer's is functioning as an omni-channel retailer and the company has taken a much differentiated approach to serve its discerning customers with its e-commerce channel. Spencer's launched the online business in 2016 with the introduction of www.spencers.in where patrons can avail hassle-free home delivery services. Currently, the services of the company's e-commerce channel are available in Kolkata, Delhi & NCR, Lucknow, Hyderabad, Vizag, and Chennai. With more than 25,000 SKUs to choose from the online platform, spencers.in comprises the widest range of assortment, which includes fresh fruits and vegetables, fish and meat, bakery,



dairy products, FMCG, personal care, organic food items, specialty food and other utility products. With its online presence, Spencer's has now been able to bring all its core offerings to the doorstep of the consumers. The Spencer's app not only provides the convenience of online shopping but it also promises to deliver assured quality products at best prices within three hours. Customers may download the Spencer's app from their android and iOS smartphones to avail the best online offers, which are seamless with its offline offerings. One may also subscribe to a periodic list of products and share the curated shopping list with friends and family members. The website also hosts Spencer's Kitchen, a one-stop destination for all food lovers who would like to explore sumptuous recipes from different corners of the world, are enthusiastic about current food trends, and are eager to receive kitchen tips. Customers can share their own blog posts at spencers.in and engage in interesting conversations about food.

Customer service initiatives: Spencer's has moved to Digital YVM (Your Views Matter) and it has reduced the time it generally takes to capture customer feedback on a real time basis. Through its simplified CRM (Customer Relationship Management) registration method, customers can now give a missed call and send their feedback. At the same time, the retailer can also send proactive messages to customers to know their experiences in store and thus create a feel good factor.

Product demos/ sampling activities

across categories: For any retailer, product sampling and demonstration at the store plays a pivotal role in reaching out to the desired TG across categories. Spencer's has introduced the concept of trial in many items across FMCG, Fresh Fruits like mangoes, etc. The Nut Counter is also a one-of-its kind section where customers can try a wider range of dry fruits and then purchase as per their choice.

Be it making the customers try the product in the food category or in the home section by helping customers select the product of their choice, the staff members are always ready to assist shoppers and drive the sampling activity.



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We undertook “Time and Motion” study of manpower, which has helped us to optimize human resources at the stores. Many of the functions have been centralized to increase speed and efficiency of action and cut down on regional costs. This has led to more profitability for the company and is helping us cater to more happy customers. We have also taken some “green initiatives” to conserve energy. Some of our Spencer’s stores run on solar energy and geo-thermal energy.

For a successful retailer, right location is the primary requisite. The other success factors essentially include innovation, technological adaptation and speed to market.



Please describe, citing specific instances, how you are using technology to enhance customer experience and improve operational excellence?

For improving operational excellence, Spencer’s has taken a dedicated approach using advanced tech-based solutions. We have carried out significant development in our ERP (Enterprise Resource

Planning) Integration with high volume suppliers to ensure timely replenishment. The tracking of real time sales has become easier with mobile-based reporting application for improving store operations. We have also worked on handheld computing system at Warehouse for higher throughput at Distribution Centres.

The customer experience has been boosted with CRM (Customer Relationship Management) based promotional schemes for customers. We are taking a lot of initiatives to offer a better shopping experience to our customers. Faster checkout at cash tills using keyboard-less POS (Point of Sales) terminals and self-checkout at select stores are some of the initiatives we have engaged in.

How much of your private labels/ house brands account for the share of food & grocery sales?

The private label brands are an important aspect of Spencer’s business and we are constantly trying to come up with innovative products. So far, there are over 1,600 items in our private label segment across multiple categories.

What interesting concepts or innovations have you introduced at your stores in terms of merchandising strategy, inventory management, etc.?

As far as our merchandising strategy is concerned, Spencer’s has been redefining its offerings by creating a differentiating factor for its shoppers each time they visit our store. In order to cater to the younger customers who are looking for quality products and a global lifestyle, Spencer’s provides an all-encompassing experience at the stores. Epicuisine, Gourmet, Patisserie, Nut Counter, Wine & Liquor and Tobacconist are some of the unique sections in our large format stores, which make shopping more exciting and engaging.

The concept of Epicuisine is derived from the words “Epicure” and “Cuisine” and it aptly defines our offerings. This section brings different cuisines of the world, which are ready for cooking or ready for consumption. It has an array of brands and items starting from Indian, Chinese, Thai, Japanese, Lebanese, Italian, Continental, Mexican, Spanish, Moroccan, and many more.

Spencer’s Patisserie is an in-store live bakery offering freshly baked confectionery and breads. The live bakery is an open see-through kitchen. The customers here can experience various innovative and delicious items starting from artisanal breads to a wide range of tempting cakes, doughnuts, tarts,

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- Certified Organic Sources**: Represented by an icon of two green leaves.
- Preserves the Environment**: Represented by an icon of a small plant growing from a hand.



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Overall, our merchandising strategy combines the local with the global – it is about being relevant to the needs, tastes and preferences of our consumers.

etc. They can even watch the entire process while our trained chefs bake each item to perfection.

Spencer's Gourmet is another innovative section of the store. The customers can purchase a wider range of assortment like breads, biscuits, beverages, chocolates, chilled and frozen items, cold-cuts, convenience food, sauces and condiments, pastas and noodles, and many more items from different parts of the world.

Nut Counter is another distinguishing section of our large format stores. It is an open-browse experience counter where the customers can taste and trial a vast range of nuts and dry fruits before they purchase.

Overall, our merchandising strategy combines the local with the global – it is about being relevant to the needs, tastes and preferences of our consumers.

Coming to inventory management, Spencer's has an extremely proficient and automated Warehouse Management System to support the inventory control process. To maintain high service rates, our intelligent monitoring of stocks enables accurate procurement of the items across categories. This helps us in achieving maximum operational efficiency.

Please share some key learnings that you have gleaned over the years in this business?

For a successful retailer, right location is the primary requisite. The other success factors essentially include innovation, technological adaptation and speed to market.

How would you describe Spencer's strengths and achievements so far?

Spencer's Retail is one of the earliest entrants in the

retail space in India introducing consumers to the concept of organized retailing. It takes pride in being a consumer centric company where we are constantly innovating to expand our offerings for our valued customer. Consumers view us as being synonymous with quality and, hence, from being their preferred food destination, we have now extended a similar offering in the non-food space with categories like apparel and general merchandise.

Spencer's strength lies in its constantly growing retail network. Our focus is on tapping and developing the organized retail market, which has helped us grow by retaining and expanding our customer base and by offering us an opportunity to evolve with them.

Spencer's success is also synonymous with the achievements of its vibrant professionals. The organization has an agile and motivated team of over 5,500 employees across 36 cities in India. For a customer-facing industry like retail, it is essential for Spencer's to build an engaged and motivated employee base and as a company we have been doing it since many years now.

What is your roadmap for the future and how do you look at the future potential of your store format?

The roadmap for Spencer's is to become the most profitable retailer in the given geographies that we operate in, with lucrative expansion through hypermarkets and small format stores. Spencer's is an aspirational food retailer and considering all the macro-economic factors and the way it is pointing towards India, the country is emerging as the most powerful retail market of the world and we are very optimistic about it. **PG**



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Distribution Redefined

Greener Grocers

Food retailers are reducing their energy usage as 2020 nears.

By **Laura Liebeck**

Grocery chains across the country are making substantive progress toward their 2020 sustainability goals. With four years to go, chains are checking off their accomplishments one by one – from installing LED lights in stores and parking lots to placing motion sensors in refrigerated cases – and adjusting their to-do lists with additional objectives that will strengthen their long-term green goals, deliver bottom-line results and impress shoppers.

“Things are tracking well,” affirms George Parmenter, sustainability manager at Salisbury, N.C.-based Delhaize America, parent company of Food Lion and Hannaford, noting that the company’s 2020 goals are still a work in progress. Parmenter adds that Delhaize America’s goals weren’t meant to be easily achieved and were thoughtfully structured. “If we had achieved any of them, the business would be asking if the goal

was stringent enough, and that would mean that we didn’t have the right goal,” he explains.

Marissa Nelson, SVP responsible retailing and healthy living at Quincy, Mass.-based Ahold USA, parent company of Stop & Shop, Giant Carlisle, Giant Landover, and Martin’s Food Markets – and soon to merge with Delhaize America – concurs, telling Progressive Grocer that she’s “very pleased with our sustainability program. Our results were driven largely by innovative, out-of-the-box thinking that was applied across all business areas to deliver on our aspirations and goals. Indeed, we have traveled this road as one Ahold USA team, and for the next five years we will continue to push the envelope to reach ambitious targets in key areas of food insecurity, food waste, healthier eating and reducing our carbon footprint.”

With more than 1,100 stores between them, both companies boast finely turned sustainability



ECO-FRIENDLY ENDEAVORS

Delhaize America’s Food Lion and Hannaford stores employ signage informing customers of their green initiatives, including LED lights in refrigerated cases and water-saving seafood cases (top images). Operationally, the stores collect cardboard for recycling and check produce sell-by dates for waste management (bottom images).



programs that are thoughtfully executed and appear to have complementary long-term goals.

According to Parmenter, Delhaize America and Ahold USA are “companies with similar ambitions and sustainability objectives, and together we’ll be able to push our ambitions further. There’s an interesting synergy that can happen, and as soon as we can begin sharing, there will be some exciting energy.”

New Targets

The environment for sustainable progress is fertile throughout the grocery industry. Of course, each chain’s various goals are in different stages of completion. Sunbury, Pa.-based Weis Markets revealed in May that it had surpassed its greenhouse gas (GHG) emissions reduction goal five years ahead of schedule. Instead of cutting emissions by 20 percent by 2020, in 2015 the chain achieved a GHG emissions cut of 22.1 percent.

“Hitting this important milestone five years ahead of schedule gives us the opportunity to continue to explore new initiatives and technologies that will further reduce our impact on the environment and streamline efficiencies in our operations,” notes Weis Markets President and CEO Jonathan Weis.

He’s not alone. Grocers nationwide are setting new targets that will provide each of them with a game plan to further reduce their energy footprint and meet new challenges. Continuing goals remain to increase the use of renewable energy sources, curtail water usage, reduce waste sent to landfills and enhance recycling, as well as to offer only sustainably sourced fish, coffee, tea, cocoa and palm oil. Goal adjustments are being made to account for changes in information and technology that are providing new and improved solutions that enable retailers to update their timelines.

Delhaize America, for example, strengthened its commitment to deforestation initiatives when new information became widely known about forests devastated by the harvesting of wood fiber, palm oil and other commodities. The company is now working toward increasing the recycled wood fiber content in its private-brand packaging to 90 percent or requiring Forestry Stewardship Council certification by 2020.

For its part, Rochester, N.Y.-based Wegmans Food Markets uses secondary refrigerants for its medium-temperature cases and has begun using natural refrigerants on a case-by-case basis for frozen areas as part of its efforts to reduce the company’s carbon footprint. Wegmans is also working to capture more plastic to expand its plastic bag-recycling program. Currently, the grocer is collecting and recycling 50 percent of each store’s plastic, with an ultimate goal to collect and recycle all plastic.



Wegmans is on a “journey to zero waste,” says Jason Wadsworth, sustainability manager for the 89-store chain. “Our goal is to not waste anything, and we’re always looking at ways to get there.”

Wegmans started a pilot program in one store in January to see how far it could get by focusing its efforts and documenting its progress. The store is now diverting 72 percent of its waste, and should hit 80 percent by year-end. Other Wegmans stores divert 62 percent of waste.

Waste Not

Waste management has become a hot-button issue for many retailers to achieve their zero-waste goals. Multilayered programs are emerging that feature enhanced efforts to divert edible food to local pantries that feed the hungry, scraps that go to farmers for animal feed, and the balance to composters for, among other things, biofuel (biogas). The keys to success with these programs are clearly stated corporate goals and procedures, as well as educated store-level associates who implement the waste management program on a daily basis.

“We’re able to show the impact of a recycling program to our [stores], and show them and provide them the positive impact composting has on the environment and their P&Ls,” explains Ahold USA’s Nelson. The grocer has “green captains” who help stores ensure “waste success,” as they’re the ones on the front lines of the program.



WANT NOT WASTE

Many grocers are reducing waste by donating “ugly” yet edible items to food banks.



We’re able to show the impact of a recycling program to our [stores] ... and provide them the positive impact composting has on the environment and their P&Ls.”

— Marissa Nelson
Ahold USA

“
Our employees understand the difference they are making on the environment, and that is something they are taking great pride in.”

— Pat Hensley
Hy-Vee

In April, Ahold USA opened a green energy facility in Freetown, Mass., that's expected to process about 95 tons of inedible food per day and an estimated 34,000 tons per year. The energy produced by the 12,000-square-foot center will provide up to 40 percent of the energy needs of the company's 1.1 million-square-foot distribution center in Freetown — enough power to operate the facility for four months. Once fully operational, the facility will create approximately 1.25 megawatts of clean electricity.

Key to the green energy facility is the anaerobic digester (AD), a new addition to Ahold USA's sustainability efforts. ADs weren't on many people's radar six years ago, including Ahold USA's, but the company is already exploring a 2.0 version that's more expedient and less capital intensive, according to Nelson.

Delhaize America also has an AD program. Having joined forces with a dairy farm in Maine that works with the grocer's 40 area stores, the company is now looking to scale up the initiative. Overall, Delhaize America stores nationwide diverted 20.2 million pounds of food from landfills last year, up 10 percent from 2014. A higher reclamation rate is expected for 2016, with 90 percent to 92 percent of stores engaged in community relationships that are making this possible.

At West Des Moines, Iowa-based Hy-Vee, food waste has emerged as a key component to its sustainability efforts. Currently, the retailer diverts more than 2 million pounds of food waste from landfills every month. Some Hy-Vee stores sell the compost from their food waste-recycling efforts to customers, or use the compost to fertilize the grocer's community garden plots.

“Food waste diversion is a key component of Hy-Vee's overall sustainability efforts,” affirms Pat Hensley, the company's SVP nonfoods, who oversees

its sustainability efforts. “Over the course of the past year, we have dramatically increased our efforts to divert food and other organic waste from landfills, because we felt it was the right thing to do. It's also evident our employees understand the difference they are making on the environment, and that is something they are taking great pride in.”

According to Hy-Vee, one ton of recycled inedible food waste saves three cubic yards of landfill space, eliminates about 5,000 gallons of methane, helps retain 300 gallons of water per acre as compost and reduces the need for agricultural chemicals, and generates about 800 pounds of soil-enriching compost.

Charging Ahead

Industry-wide, other sustainability program enhancements now include electric car-charging stations, rooftop solar arrays and rain catchment systems. While none of these were part of grocers' original goals, or only mildly so, they've continued to gain momentum as new technologies and financial incentives have made such accomplishments possible.

Hy-Vee is further down the road than many, with 103 electric car-charging ports at 32 stores in five metro areas, up 25 percent from 2014. Delhaize America is getting ready to flip the switch on a 10-store test of electric charging stations at Maine Hannaford stores, which will fully charge a car in 30 minutes, about the time it takes to complete a weekly food-shopping trip. While Delhaize America is interested in the car-charging program, Parmenter notes that it's not a big focus area, “because it doesn't reduce our carbon footprint. It's more about being a productive member of the community.” Ahold USA currently has three sites, all in Massachusetts, and is adding two more locations, one each in Maryland and Connecticut. Nelson says the company is working on a long-term strategy for this initiative.

Meanwhile, solar panel arrays are cropping up on more store rooftops as installation costs decline. Ahold USA currently has 41 solar-powered stores and three others run by fuel cells, while Hy-Vee employs solar panels to power parking lot lights and has installed rooftop systems on some of its convenience stores. Wegmans is slowly expanding its rooftop solar program, with panels on three stores in New York, one office building and one distribution center. According to the company, placement is based on a case-by-case basis and requires a clear span on the roof, which also supports the store's refrigeration unit.

Rain catchment is also gaining some attention among retailers. Austin, Texas-based Whole Foods Market recently opened a cutting-edge location in San Jose, Calif., that catches rain to feed the store's landscaping, while Wegmans has been collecting rainwater for some time, and Ahold USA's Nelson says that the topic is “ripe for conversation.” **PG**



KEEP ON TRUCKIN

A GreenRU truck visits a Hy-Vee store to collect organic waste.



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The **MIEAT** of the **MATTER**

A young demographic, rising disposable income and time-pressed urban consumers looking for convenient meal solutions without compromising on health aspects are the factors driving the market for meat and seafood category. As foodies invent ever-new ways to create and consume food, it's natural that more retailers and suppliers are excited by the opportunity of growth that the market is capable of and the newness that they can offer to consumers in the meat category. But brands need to differentiate and offer value-added products. They need to constantly innovate on the product front and price their products in a manner that makes the consumer appreciate the value in terms of product's taste, flavor, and convenience. It is a promising market for manufacturers that can deliver high value, technology oriented, branded packaged products in a fast emerging organized segment.

By Sanjay Kumar

The Indian meat market is currently worth US\$31 billion, according to market estimates. It is growing at a CAGR 20% and will reach US\$65 billion by 2022. Out of the total \$300 billion Indian grocery market, this is the only largest category that is largely unorganized and where 90% of the meat sold annually is handled outside the organized market. The annual per capita consumption of retail processed meat and seafood products, though still low at 29.36 gram and 6.65 gram respectively is growing in the country, according to Mintel Market Sizes. India's per-capita consumption of meat puts it at the second position on the list of countries with the least meat consumption per person. But while this distinction can be attributed to our 2,000-year-old tradition of vegetarianism, yet like all old cultures, this one is changing as well. The demand for meat is expected to grow faster in India with sustained economic growth, rising per capita income, strengthening urbanization trends and increasing awareness of the nutritive value of meat and meat products. By 2020, the demand for meat and eggs is expected to reach eight million tonnes.

Fish production in the country during 2015-16 (provisional) was 10.79 million metric tonnes with a contribution of 7.21 million metric tonnes from inland fisheries and 3.58 million metric tonnes from marine fisheries. The total fish production in 1990-91 was 3.84 million metric tonnes, which increased to 10.79 million metric tonnes in 2015-16. The share of inland fisheries in total fish production has increased from 60% in 1990-91 to 66.81% in 2015-16, thereby reducing the share of marine fisheries from 40% in 1990-91 to 35.93% in 2015-16. Though India is second in seafood production throughout the world, our per capita consumption of fish is at 10kg/ person/ year. In China, the per capita food consumption of fish has increased from 30kg/ person/ year in 2007 to 42kg/ person/ year in 2016. The global OECD average of fish consumption is at 25kg/ person/ year. Over the next decade, Chinese per capita consumption of fish is projected to grow further to 50kg/ person/ year. (Source: OECD-FAO Agricultural Outlook 2017-2026).

Meat, seafood and poultry products are nutrient dense and rich in protein, vitamins and minerals. A three-ounce serving of meat or poultry contains between 160 and 200 calories and has all the nine essential amino acids, which is why meat is considered a 'complete protein.' Meat provides more protein per serving (25 grams per 3 ounces) than dairy (8 grams per cup), eggs (6 grams each), legumes (12 grams per ¾ cup), vegetables or nuts (2 to 5

grams per serving). Protein is critical for developing, maintaining and repairing muscles and is needed to make enzymes and hormones besides being a basic building block of bones, cartilage, skin, and blood.

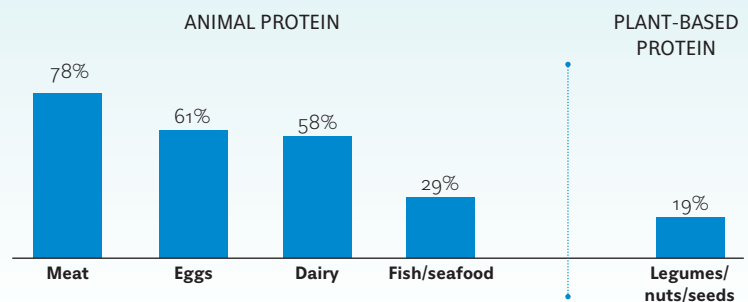
With incomes rising, protein consumption will continue to grow and will intensify even further with increased use of bigger home refrigerators, which will spur an increase in the ticket sizes. Our country's growing middle-class will push the growth of the meat sector by showing a preference for high-protein food like meat. This is evident from India's largest household consumption survey conducted by the National Sample Survey Office (NSSO), with a sample size of over one lakh households. In fact, a recent survey has busted the myth that India is a vegetarian country; 72% of Indians have non-vegetarian dietary habits with south India being a heavy meat consuming region compared to central & north India. So, while vegetarianism is often believed to be widespread in India, influenced by religion and other factors, the data seems to suggest otherwise. Rather, India is projected to be one of the largest growth areas for consumption in chicken, beef, and mutton. According to the sample registration system (SRS) baseline survey 2014 released by the Registrar General of India, 71 per cent of Indians over the age of 15 are non-vegetarian.



“
Chicken consumption has grown the most with India becoming the fourth-fastest growing market for the product in the world. The proportion of households consuming chicken has shot up significantly, while that of the fish-eating households has increased marginally.

— Yogmaya Chatterjee
Food and Drink Analyst,
Mintel

Meat, Eggs and Dairy are consumer's primary sources of protein
(Top five protein sources via consumer survey)



Source: Nielsen



Launching meat and fish section at traditional grocery stores is not an easy business and such products can be made available only if traditional grocers have a full-fledged cold storage or a tie-up with a vendor who has such capabilities.

— Avinash Tripathy
Buying and Merchandising Head,
Godrej Nature's Basket

It means that 330 million of India's 1.2 billion people are vegetarian but it obscures the fact that many are rapidly abandoning their vegetarian diet due to an increased desire for meat. The figure is interesting in the sense that meat consumption is a good marker of economic development. The economic gap between developed and developing countries is often reflected in their meat consumption. While people in developed countries meet more than half (56 per cent) of their protein needs from animal sources, it is only 18 per cent in the case of people in the developing countries like India. Protein foods are linked to attributes like satiety, weight management and energy, all of which enhance the appeal towards its consumption. As a result, the volume of processed meat and fish consumption in India is set to grow at an annual rate of 15.9 per cent and 14.3 per cent respectively.

Research shows that there will be about 80% growth in meat demand by 2022 driven by convenience. This will bolster the adoption of processed meat, fish, and poultry products. Higher meat consumption in India is not entirely surprising, as meat-heavy diets are often correlated with an increase in wealth. As the emerging market countries like India gain a larger share of the economic pie, the trend is likely to continue.

As per a new research from global market intelligence agency Mintel, India is currently second fastest growing processed meat and poultry market globally with a CAGR of 22%. Indonesia stands first in this category with 26.7% CAGR between 2011 and 2015 followed by Vietnam at 15.5%, China at 13.9% and Brazil at 10.9%. As per the report, India is one of the fastest growing retail markets for processed fish and seafood globally,



WAYS TO INCREASE RETAIL SALES

- For grocers looking to boost their meat case's role as a profit center, variety, value and education are going to be among the most influential factors. One of the most important things retailers can do is educate consumers on how to prepare fresh meat. They need to educate customers on the various cuts of meat available to them, and the best preparation methods. Making sure they have positive eating experiences ensures repeat purchases and long-term loyalty.
- More consumers are looking for value from grocers. Strategic partnerships with meat suppliers will help retailers bring customers the greatest value.
- To offer greater value to customers, grocers should be savvy enough to deliver mealtime solutions.
- Value can be expressed or perceived by customers in many different ways. While actual price can have an effect, but more consumers are also looking at other factors: appearance (buying with their eyes) and benefits (like shelf life, easy-open, no mess, no leaking packages, etc.).
- Retailers must make sure to stock their case with a variety of choices to give consumers the option of moving up to the next tier of quality, which will also be an opportunity for the retailer to gain higher total sales.
- Retailers may use a dual price strategy, with a product offering that might be better than a competing product, and then a best or premium brand in the same protein category at a more limited SKU set.
- Highlight variety: Research shows that consumers need to feel like there is enough of a variety in the case, and consumers relate variety in the meat case with the number of packages available, not the number of SKUs. Retailers should be stocking at least four packages of each item on display, especially during holidays and seasonal times, when meat department traffic is highest.
- The meat case can become the anchor for lucrative cross merchandising. Grocers need to move toward selling meals rather than just ingredients. Whether it is merchandising with refrigerated mashed potatoes or pastas or vegetables, promoting meat with products that help consumers with their daily dinner dilemma can be beneficial to multiple departments across the store and boost overall sales.
- Design a meat case that appeals across demographic groups. Expand your convenient cuts assortment. Harness health and wellness as a growth driver.

growing at a CAGR of 24.9% between 2011 and 2015, while Indonesia has seen a CAGR of 19.5%, with Turkey 11.8%, South Africa 11.2% and Russia 10.8% rounding out the top five growth markets. Global innovation within the processed meat, poultry and fish categories has increased over the years and many markets with the highest growth potential are from the Asia Pacific region, the report said.

“The need for convenience is the key driver behind Asia’s growing processed meat, poultry and fish retail markets in Indonesia, Thailand and India. Demand for processed and ready-to-eat foods, particularly frozen foods, is growing across Asia as increasingly time-pressed consumers have embraced the convenience of the freezer and of microwave cooking. Aligned with consumer interest in the region, processed meat, poultry and fish product innovation in 2016 saw strong focus on convenience claims, such as ease of use and microwaveable,” says the Mintel study, adding that convenience is at the heart of adoption of processed meat, fish, and poultry products as time-pressed urban consumers are looking for easy to prepare meals, fuelling the demand for processed food products.

India’s meat production registered an increase of nearly 9% in the 2016-17 monsoon over the previous year. According to the latest government data on India’s meat production, total meat production increased to 2.43 million tonnes between July-October 2016-17, as against 2.24 million tonnes for the same period during 2015-16, registering a growth of 8.74%. According to an official statement as per the Integrated Sample Survey 2016-17, about 47.86 per cent of the meat output is contributed by poultry and over 20 per cent from buffaloes. Uttar Pradesh, Maharashtra, West Bengal, Andhra Pradesh, and Telangana are key meat producers. In case of eggs, the total output in 2016-17 was estimated to be 55.11 billion of which 29.09 billion eggs was from monsoon season. The production of eggs is largely contributed by commercial poultry farms at nearly 75.75 per cent and the remaining production coming from household/ backyard poultry. Tamil Nadu, Andhra Pradesh, Telangana, West Bengal and Haryana were five largest producers of eggs. India currently stands as one of the largest exporters of poultry meat alongside China, Brazil, EU, and Mexico.

Trending meat products

In India, the growth in the meat sector is led by poultry whose market size is expected to grow tenfold by 2050. Poultry’s share in total meat

consumption stands at 28 per cent currently, as against 14 per cent ten years ago. “Chicken consumption has grown the most with India becoming the fourth-fastest growing market for the product in the world. The proportion of households consuming chicken shot up from eight per cent in 1993-94 to 38 per cent in 2011-12, while that of the fish-eating households increased marginally from 30 per cent to 32 per cent over the same period. The proportion of goat-meat/mutton-eaters has fallen significantly — from 30 per cent in 1993-94 to 15 per cent in 2011-12. The population of beef and buffalo meat-eaters has remained more or less constant at about six per cent over this period according to NSSO 2011-12,” says **Yogmaya Chatterjee Food and Drink Analyst, Mintel.**

According to Mintel Global New Products Database (GNPD) estimates in 2016, in retail processed fish products (frozen fish, seafood and seaweed, and also meal centers and ready meals), 57 per cent launches were in the frozen segment while the rest were in chilled fish products (this includes all packaged fish, seafood and seaweed, which have been further processed in some way). It also includes smoked and salted fish but not plain filleted or portioned products, which have also started to



““

Customers are shifting from buying non-veg from unorganized / open market outlets to modern retail stores where products are handled in a much hygienic way.

— **Dnyaneshwar Phadtare**

Merchandising Head – Meat, Fish and Frozen – at HyperCITY Retail



Convenience of shopping, availability of a wider range under one roof, assurance of correct weight and quality, right pricing are the key differences over the wet market, which encourage shoppers to buy meat products from organized retailers.

— **Shashwat Goenka**
Sector Head –
Spencer's Retail Ltd

emerge with a 26 per cent share in new launches compared to 31 per cent launches in frozen fish and a 1 per cent launch in the chilled fish segment in 2014. Private label launches are gaining momentum and they are likely to gain owing to the strong preference for fresh food consumption. On the other hand, in meat and poultry products, frozen meat products that include meat patties, kebabs, and meat balls take the greater share of 81 per cent launches in 2016 compared to a 64 per cent share of new launches in 2014. For poultry, in the chilled segment that includes pre marinated chicken and smoked products, new launches have grown from 16 per cent in 2015 to 28 per cent in 2016.

With foodies inventing ever-new ways to create and consume food, it's natural that more grocers are paying attention to a core of their store: the meat case. According to studies on the Indian meat market, while meat and meat products, especially the poultry industry, is growing at 8% to 10% CAGR since the past few years, the value-added products are growing faster, estimated at 20%. It turns out that increasing the number of meat options for shoppers may be one of the secrets to increasing meat sales and overall category sales. It's a formula that is followed scrupulously by gourmet food retailer Godrej Nature's Basket, which stocks an array of value-added meat products comprising chicken, turkey, duck, lamb, pork and seafoods. This range can be further divided into subcategories such as Fresh Chilled (raw and processed), Frozen & Cold Cuts and Canned Non-Veg, which is mainly driven by imported brands like Zwan, Ayam, John West, among others. GNB also has a reputation for carrying a very distinctive meat range – lamb meat from Australia and New Zealand, turkey meat from Spain, raw pork from Belgium, German sausages, fresh seafoods (Salmon and Basa), and imported cold cuts from Austria, Spain and Germany.

The sales figure for the frozen and refrigerated food category is also much higher at gourmet food chain Godrej Nature's Basket than at many other big-box retailers, at 28 per cent of the overall sales. Also, sales from the category have been growing steadily and impressively, at over 20 per cent year-on-year. Says **Avinash Tripathy, Buying and Merchandising Head, Godrej Nature's Basket:** "Imported salmon is the top selling SKUs in the frozen portfolio followed by imported basa, prawns, seer fish, crab stick and pomfret. Chicken seekh kebab, chicken nuggets, smoked chicken, chicken tikka, chicken popcorn, chicken burger patty, shammi kebab, chicken fingers, green peas, cheese corn nuggets and potato-based SKUs are also top sellers. These apart, boneless pork chop, boneless goat meat, pork loin steak, and minced goat meat are the other hot-selling products in the frozen category." Typically, top gourmet retailers allocate 18-20 per cent of the shelf space to the meat category within the overall store space. Inventory turnover time varies from one day to 35 days and the typical average inventory turnover time for this category is about 17 days.

"Today, a majority of Modern Trade food and grocery retailers are inclined toward selling frozen meat as compared to fresh meat," points out Tripathy. Over the years, a lot of people have come to accept this category though it's still on a growing stage of the industry life cycle curve. The category has some established players who have

Meat: A superfood rich in essential nutrients

Nutrient	Function
Choline	Supports nervous system development
Niacin	Supports energy production and metabolism
Riboflavin	Helps convert food into fuel for lasting energy
Thiamin	Promotes energy production and supports the nervous system
Vitamin B6	Supports brain and nervous system health, normal metabolism, and production of red blood cells
Iron*	Promotes cognitive health and enhances oxygen delivery
Phosphorous	Helps build bones and teeth
Potassium	Maintains normal blood pressure
Selenium	Protects cells from damage
Zinc	Helps maintain a healthy immune system

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| Exotic Cookies & Choconut | Premium Assorted Cookies



“We have an end-to-end cold chain management from the source till the consumer’s home. We operate on a hub and spoke model, which means that each city has a processing center where the entire processing (cleaning, butchery, storage and marination) happens.”

— Abhay Hanjura
Co-founder, Licious

been there for over two decades and have worked to build this category. McCain Foods, Venky’s, Sumeru, Red Lobster, Godrej Real Good Chicken and Godrej Yummiez are some of the major brands that have been there in this segment for quite some time now. As the industry grows, more and more players will try and enter the market. And as consumer preferences are changing, only those companies will grow and thrive that will work on product innovations. Consumers are experimenting more and more today and they are ready to spend on good and differentiated products, which stand apart in taste and experience and companies with a wide product range to offer will corner a greater share of the market. On the product front, taste and quality are the most profound factors coupled with the availability and visibility of the product to the consumers, which will drive the category performance.

According to Tripathi, there are very limited chains even in Modern Trade that have an in-depth assortment in the meat category. The other Modern Trade players to have a meat section across all their stores are Star Bazar, Foodhall, HyperCITY and SPAR. These grocers ensure that they have the best in class assortment of premium, International and gourmet range of meat and seafood products at their stores. “HyperCITY stocks meat products that include raw chicken, mutton, fish, different cuts

of chicken, mutton, marinated chicken/ mutton, all major varieties of sea water and fresh water fish, marinated fish, fillets of fish, prawns, lobsters, dry fish, all kind of cold cuts of local and international brands, fresh chilled imported salmon, New Zealand lamb, different varieties of eggs – Omega 3 enriched, herbal, brown, free range, duck, quail; season based SKUs like turkey and many more,” says **Dnyaneshwar Phadtare, Merchandising Head – Meat, Fish and Frozen – at HyperCITY Retail**, which boasts of having one of the finest and premium range of meat / seafood / cold cuts.

He reveals that the assortment and range at HyperCITY includes raw frozen seafood – salmon fish, basa fish, prawns, surmai, pomfret, etc – to breaded value-added chicken and seafood SKUs comprising chicken nuggets, fingers, popcorn, burger patty, etc. Seafood SKUs include fish fingers, fish popcorn, samosa, frozen cold cuts, frozen kebabs, tikka, etc. The refrigerated or fresh chilled category SKUs extend to raw fresh chicken SKUs, raw fresh seafood SKUs, raw fresh mutton SKUs; fresh chilled cold cuts and fresh chilled marinated SKUs. At HyperCITY, non-veg products contribute about 6 per cent of food sales and are one of the most important drivers of footfalls.

Players like Big Bazaar, More, Spencer’s carry a selective range in their stores at some locations as per the catchment. Then there are some standalone stores like Dorabji and Haiko that also keep a good assortment of meat products. “Our major business in meat products comes from the hyper and super formats. At the same time, frozen and chilled packed meat ranges are also gaining traction in our small stores but it is seafood that is clocking the highest growth, primarily due to the stores offering a superior level of convenience over the wet market,”

Market size | Historical | Total Volume | mn tonnes
(Market size in total volume)

India	2015	2016	2017
Fish and Seafood	8.0	8.4	8.8
Meat	7.2	7.4	7.6

Source: Euromonitor



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The trend of buying through modern retailers is expected to increase in the future as the price difference between modern and traditional retailers decreases. Hygiene factors and changing lifestyles will also hasten the shift to increased purchase of meat products from modern retail.

— Dilip Radhakrishna
Research Analyst
at Euromonitor
International

says **Shashwat Goenka, Sector Head – Spencer’s Retail Ltd**, whose stores offer close to 400 products in fish and meat, including fresh chilled, frozen non-veg and delicatessen offerings.

Like meat and poultry products, seafood consumption has been constantly increasing over the past few years and will play an important role in contributing to the overall turnover of the meat industry. Fish, which used to be eaten mainly in the coastal regions of our country, is now finding takers all across India. The country is a huge market for seafood products and, in the next 10 years, India is expected to become one of the most significant markets for seafood. Until now, the frozen seafood market in India has been dominated mainly by raw frozen food. But the trend in seafood has now shifted to RTC and RTE segments and this is especially true in urban India where couples work and have very little time to cook. So they are constantly looking for something that requires very little cooking time and is also healthy.



As frozen food comes to get increasingly accepted across India with people believing in the quality of RTC and frozen foods, good quality and availability of frozen products throughout the year is a critical factor that will influence consumers. There is a growing demand for good quality frozen seafood and in recent years quite a few seafood companies have started selling exotic surimi line of products like crab sticks, crab claws and lobster bites. The best thing about frozen food is that there are no chemical preservatives used. And advances in freezing technology has now made it possible to add value in terms of convenience and reduce kitchen time than just be a technique used more for preservation.

Today, as more shoppers consume seafood, the more willing they are to purchase it raw and prepare it at home. But lingering preparation trepidation may be preventing some potential buyers from approaching the fresh seafood section. To surmount this particular barrier to increased seafood sales,



Market size Historical Retail Value RSP INR bn Current Prices (Market size in retail value sales)			
India	2015	2016	2017
Fish and Seafood	2,465.1	2,797.3	3,163.1
Meat	1,744.3	1,902.3	2,330.4

Source: Euromonitor

various grocers and suppliers are adopting solutions that encompass both in-store and digital elements. Retailers and suppliers say that the best way to support consumers and dispel any myths around seafood is to share simple recipes, educate them on how to purchase, and articulate the differences in the wide variety of species they have to offer.

Seafood in modern retail

Fresh seafood is an important category in the perishables division of any Hypermarket, Supermarket or Cash and Carry chains. Modern chains are taking extra care to keep the products fresh by following appropriate standards of quality, as per norms. Though the price may be higher sometimes for the same fish of same size compared to what customers are getting on streets or in local markets, but it’s worth paying higher as it assures many times the quality, hygiene and traceability of the products. Top brands in frozen seafood in Modern Retail include Gadre Marine, Cambay Tiger, Big Sams, Empire, Sumeru, IFB, Buffet, etc.

Many of the leading Modern Trade and/or Cash & Carry players follow the HACCP standards, which are usually being adopted for export of seafood products. It implies that the Indian consumer is more aware of eating healthy & safe seafood. Equipped with freezer capacities, Modern Retailers given an option to consumers to buy appealing frozen seafood. Packaged and frozen seafood provide a quick and convenient meal option. An added advantage of frozen seafood is the shelf life of the product. Many of frozen seafood packs come with an average shelf life of one year. Busy lifestyles and convenience for food have supported



Retelling retail with self-checkout



- ⦿ **Mobile App**
- ⦿ **Handheld POS**
- ⦿ **Self Checkout Kiosk**





Imported fresh/ chilled seafood

In India, though there is less focus at the moment on import of fresh seafood, the trend is slowly increasing since the past three years. With an increasing number of Indians travelling across the globe, the benefits of eating healthier seafood (e.g. Atlantic Salmon) is fast spreading and in turn growing the market. Atlantic Salmon is the lead commodity among imported seafood products. Norway is exporting its seafood to more than 140 countries in the world and a major portion of Atlantic Salmon in India is coming from Norway though the volumes are comparatively lower. There are very few players operating as importers of Fresh Seafood in India, namely, Indepesca (Big Sams), West Coast Fine Food, Leo Gourmet Private Limited, Fortune Gourmet Private Limited, Catch of Norway, Fiske Fresh, etc.

Leo Gourmet Private Limited is the only company in India that follows ‘Friend of the Sea’, a global sustainable sourcing standard for procurement of its seafood. They have plans to make available various ranges of European imported seafood to consumers in India, which mainly will include Atlantic cod, Chilean seabass, halibut, scallops, turbot, sole, blue mussels, etc. This range of fish is in high demand already at many leading hotels and in gourmet retail stores. With the recent entry of Mumbai-based Fiske Fresh, the brand is trying to set its foot in imported fresh chilled category with Atlantic salmon, which it is catering to a small set of customers. Heavy import duties are a major constraint in the development of imported seafood business in India. Presenting solution towards this will boost the imported seafood segment which, in turn, will help the gourmet industry to grow further.

As consumers in India move towards brands that can guarantee them a certain standard of quality, there exists a tremendous scope to build a brand with trust. This is where modern trade retailers and branded products have a key role to play.

Market size Forecast Retail Value RSP INR bn Constant 2017 Prices Period Growth (Forecast CAGR % growth in retail value sales)	
India	2017 - 2022 CAGR %
Fish and Seafood	3.0
Meat	2.6

Source: Euromonitor

the growth of processed seafood in 2016. Frozen processed seafood was one of the fastest growing categories in 2016, worth INR 2000 million in value.

A recent development is of online players getting into this business with a keen interest being shown by online giant Amazon in food in general and fresh categories in particular. Fresh seafood is one of the last frontier categories for them as it is globally. A few local India online players like Licious, with a fresh to home proposition, have established fish & seafood online business in a few urban cities, which started at a small scale with limited infrastructure but are growing fast now. This segment, with its additional services and convenience, is expected to grow very rapidly in the coming years. Flexible plastic option for packing is slowly increasing its importance in frozen processed

seafood. 200 gm flexible plastic packs in frozen processed seafood saw a notable growth of 18% whereas 500 gm packs saw the strongest growth of more than 25% in 2016. Zip/Press closure flexible plastic could be seen as offering greater convenience to consumers and may see an increase in such packaging for more gourmet products.



Building the trust factor in meat products

“Launching meat and fish section at traditional grocery stores is not an easy business and such products can be made available only if traditional grocers have a full-fledged cold storage or a tie-up with a vendor who has such capabilities,” explains Tripathy of GNB. In India, the food processing industry has its inherent challenges, of which, food safety from farm to fork is at the top. This is followed by cold chain infrastructure across the extended supply chain in our country, which is critical to processed food industry and more so as food products are perishable and temperature sensitive. Inefficient infrastructure, high energy costs, rising real estate prices and uneven distribution capacities increase the cost of production, thereby leading to higher product prices. Although government

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India Food Retail Tech (IFRT) is a tailored platform for technology solution providers to showcase the latest products, innovations, services, tools.



Consumers today are looking for more options in products in different categories like fry and serve, grill and serve, heat and serve and cold cuts, and these are some of the most popular products in the youth segment.

initiatives in this sector have been encouraging, it will take time to reach a state of developed cold supply chain.

In addition, the cold chain infrastructure still does not attract many private entrepreneurial interests, in taking up the challenge to provide a seamless service from farm gate to retail point.

“We have an end-to-end cold chain management from the source till the consumer’s home. Our processing center, delivery centers, etc. are all cold-chain powered. We operate on a hub and spoke model, which means that each city has a processing center where the entire processing (cleaning, butchery, storage and marination) happens. From the processing center, the meat is transferred to our delivery hubs. Once a customer orders, the product is delivered from the nearest delivery center within 90 minutes in a uniquely formulated temperature-controlled box, which ensures fresh delivery at the doorstep. In fact, this cold chain remains unbroken at every step of the way right from sourcing, processing, transfer and delivery,” says **Abhay Hanjura, Co-founder, Licious**, which offers fresh poultry, lamb and a fairly exhaustive range of sea food as well as a whole range of delicious pre-marinated meat for gourmet meat lovers.

Hanjura says that Licious is India’s only absolute fresh meat brand unlike other brands that operate in silos of poultry, seafood, etc. “This means we are a single window solution for all fresh meat cravings backed by an impeccable technology platform. To set us apart, we are taking a ‘brand’ route, which means we don’t act as a mere platform that promises time-bound delivery but take complete ownership at every step of the way with eyes fixed on the ‘quality & source’”. Further, we have diversification in categories like marinates, which gives us a very unique identity among all meat lovers. We have a dedicated team of expert international chefs who

are constantly innovating and will be adding new categories in the coming days.”

As consumers in India move towards brands that can guarantee them a certain standard of quality, there exists a tremendous scope to build a brand with trust. This is where modern trade retailers and branded products have a key role to play. “Our understanding is that the problem/ gap doesn’t lie in the availability. The pain point really is hygiene, safety and freshness of meat, which eventually ties into the “trust” factor! It’s an interesting problem and we have decided to disrupt a very exciting market. In the coming years, we aim to organize this space systematically by adding value at every step of the existing ecosystem. We have been ahead of the curve by bringing on board the best team that understands the intricacies of consumer business models and the importance of scale,” says Hanjura.

“Customers are shifting from buying non-veg from unorganized /open market outlets to modern retail stores where products are handled in a much hygienic way – products are stored at the right temperature, staff gives you the right product information, and they come with the experience of buying and prompt customer service. Our customer promise and brand positioning of ‘something fresh every day’ ensures that we bring fresh products to the customers as soon as possible and reduce whatever time we can from sourcing to selling. This way our customers are able to get a wide range – be a normal lamb or New Zealand lamb, Catla fish to smoked salmons – under one roof. Another aspect is that we understand the catchment and make the products available as per the requirements of specific regions. For example, the HyperCITY store in Janakpuri, Delhi, sells more chicken than fish – the reason being that the locality is dominated by Punjabis. On the other hand, our Noida store sells more fish as it has a strong Bengali catchment. Hence, assortment must be planned as per the requirement of the customers in the catchments. We study and





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cater to the needs of our customers in the areas and catchments where we operate our stores,” says Phadtare.

“Convenience of shopping in a hygienic and comfortable environment, availability of a wider range under one roof, assurance of correct weight and quality, right pricing, cutting, cleaning of choice free of charge are the key differences over the wet market, which encourage shoppers to buy meat products from organized retailers,” says Shaswat Goenka. Apart from offering a wide and varied assortment, there is also a much higher level of convenience that Modern Trade retailers have to offer vis-a-vis the open/ wet market.

Innovate and differentiate

The opportunity for growth that the market is capable of and the newness that manufacturers and retailers can offer to the consumers in the meat category is immense. But brands need to differentiate and offer value-added products to the consumers. Value-added meat products like pre-seasoned/ pre-marinated meat products make it easy and convenient for consumers to get dinner on the table, for which they are often willing to pay a premium. Brands need to constantly innovate on the product front and price their products in a manner that makes the consumer appreciate the value that is charged. For adding value in terms of product's taste and flavor, convenience, and for reducing kitchen time, manufacturers need to take to delivering high value, technology oriented, branded packaged products in a fast emerging organized segment.

As manufacturers and retailers take to catering to a class of people (youth) that is constantly looking

Consumer eating habits — particularly around meat — are steadily evolving, and retailers opine that sales of smaller, less expensive and perceived-as-better-for-you options would be higher in the future.



TOP MEAT CONSUMERS IN INDIA

STATE	MEN	WOMEN
Telangana	98.8	98.6
West Bengal	98.7	98.4
Andra Pradesh	98.4	98.1
Tamil Nadu	97.8	97.5
Kerala	97.4	96.6
Odisha	97.7	97.0
Jharkhand	97.2	96.3
Bihar	93.2	91.7
Chhattisgarh	82.7	81.4
Assam	78.6	80.2
Karnataka	79.1	78.7
Uttarkhand	74.5	70.8
Jammu & Kashmir	69.0	68.1
Delhi	63.2	57.8
Maharashtra	59.0	60.6
Uttar Pradesh	55.0	50.8
Madhya Pradesh	51.1	47.7
Gujarat	39.9	38.2
Punjab	34.5	32.0
Haryana	31.5	30.0
Rajasthan	26.8	23.4

*Figures in percentage

Source : National Sample Survey on Household Consumption, Govt. of India, 2014

for something new in an already saturated frozen food market, quality, variety and specifications based on consumer needs will be the growth drivers of the category. As consumer preferences are changing, only those companies will grow and thrive that will work on product innovations. Consumers are experimenting more and more today and they are ready to spend on good and differentiated products, which stand apart in taste and experience.

Apart from the regular nuggets and fingers and shots, the demand for unique products like chicken jalapeno salami, Italian herb sausages, chicken rings, which not only sound exotic but taste fantastic too, will continue to climb. Consumers today are looking for more options in products in different categories like fry and serve, grill and serve, heat and serve and cold cuts, and these are some of the most popular products in the youth segment. So companies need to blend both Western and Indian tastes for catering to a well-aware target, which has developed a distinct taste for European and American aromas and flavors. Almost 65% of the Indian population is below the age of 35 years and the products should be aimed at offering convenience food to this consumer segment.

Brand awareness about the product, nutritional balance and health awareness, hygiene and quality will be key parameters in shaping the category's performance. Also, people are more inclined toward convenience foods like ready-to-eat products, and their availability will play a major role in the



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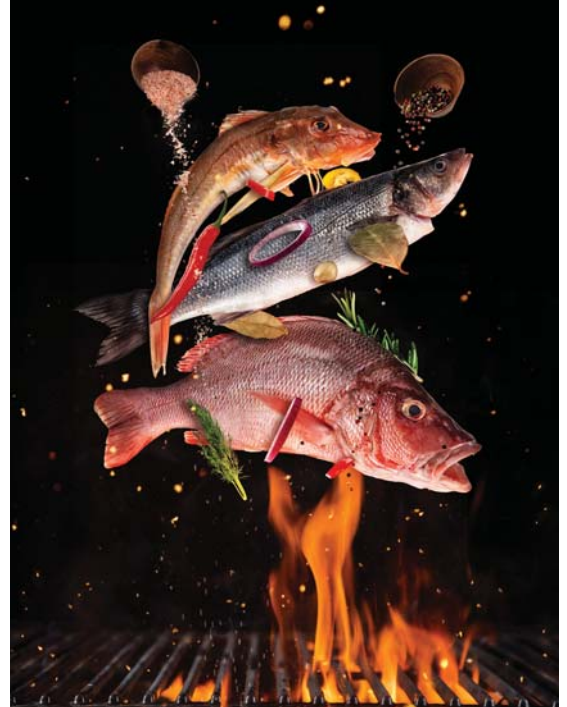
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With convenience and portability a trend across the food and beverage industry, consumers are seeking high-protein meat snacks. Going ahead, the market for products like meat jerky, meat snack bars, and meat sticks is set to grow.

category's performance. Most manufacturers and retailers agree that exciting products and great taste will drive the category, provided the products are showcased well and the consumer is in a position to taste the same before making an informed purchase decision. Keeping this in view, in-store sampling is one of the key initiatives that brands and retailers can take up and this is an area where they need to strongly focus on.

Packaging and labeling

Today's youth is looking for a value proposition. They don't mind spending a rupee more if they feel they are getting something more out of their money. Exciting and innovative looking packaging is part of the overall value proposition. One way, companies can do well at cracking the market is to have their in-house team of food experts who constantly study the market and strive to keep up with the times, tastes and value for money proposition. The products should be tried and tasted by internal food panelists first and only then sold to the TG.

When great care has been taken to develop the product, the same should go into the packaging and labeling as well. Not only do the products meet the FSSAI's labeling regulations but they also need to convey the details of the products to the customers as well. At the same time, processed and frozen meat products should have the right packaging that can handle temperature fluctuations by ensuring that the packs are of high quality, freezer-safe, and can prevent damage of the products. Products should be packed in high quality cartons, which can handle the stress put on them. At the end of the day, product packaging is the first thing that attracts a customer before they even try a product.

Today, packaging is being taken to a different level where it is not merely the gelling of colors and visual appeal. Surveys are conducted to understand

what the TG is looking for. Which are the colors that appeal to the youth most? All this has led to out-of-the-box packaging themes and concepts. Target-audience-based packaging helps keep up with the market trends and ensures that customers eat "with their eyes first!". Besides, pack size need to be convenient - products in one-time consumption packs and family meal packs are the trend today. Products that come in 250 gm, 500 gm and 1 kg packs offer customers more options to choose from. With inflation rising in all sectors, customers are increasingly looking for a value proposition in everything they purchase.

Trends to watch out for

Consumer eating habits — particularly around meat — are steadily evolving, and retailers opine that sales of smaller, less expensive and perceived-as-better-for-you options would be higher in the future. In other words, make your meat offerings more convenient, cheaper and what consumers consider healthier or shoppers may look the other way. In terms of key consumer segments, convenience-seeking Millennials seem to want it all in the meat department. For this segment, demand for smaller portions of meat takes a front seat to just about every other trend in the department. The smaller portions are the result of two evolving trends. For one, some folks aren't ready to give up meat, but are simply trying to eat less of it, so they're purchasing smaller portions. At the same time, aging Baby Boomers tend to eat less of everything — including meat — and often prefer to purchase it in smaller amounts.

And let's not forget about the fact that consumers are increasingly seeking value-priced meat. Consumers short on time, but long on the need to quickly feed their families, are increasingly rewarding retail meat departments that play up value. The value-added category, which includes




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With supermarkets spreading to even Tier II and III towns, there will be greater support for growth in the retailing of chilled/ frozen meat products. New players have been emerging regularly, which indicates that the market size is expanding and a lot of MT stores have started selling chilled meat as well.

offerings like kabobs and marinated meats, are enjoying a jump in sales. But perhaps the fastest-growing category of meat eaters is the consumer whose chief concern is perceived safety and improved nutrition. In a world where there is an increasing clamor to sell antibiotic-free chicken, supermarket chains find themselves under the very same pressure. That's why meat executives say that they see an increased consumer demand for meat that is free of antibiotics, hormones, MSG and additives. Meat producers are keenly aware of this, and misperceptions are driving some to address the issue head-on. As an industry, producers and retailers need to do a better job of providing more information of how food gets from farm to table.

Then there's the ongoing national obsession with all things organic, with rising sales of organic meats in tandem with the category's overall growth. Demand for pricier organic proteins will most likely see an appreciable jump in the future. Market research firm Nielsen notes on consumers' growing appetite for "clean" meat labeling: Though natural, minimally processed, antibiotic-free, hormone-free and organic meat products today account for a relatively small piece of the total meat department, but these products will represent a significant amount of sales in the future. Sales growth for some of the meat label claims with the highest shares (natural, antibiotic-free and hormone-free) will outpace that of conventional meat in the years ahead. With convenience and portability a trend across the food and beverage industry, consumers are seeking high-protein meat snacks. Going ahead, the market for products like meat jerky, meat snack bars, and meat sticks is set to grow.

Conclusion

Players in the meat industry believe that there is a huge opportunity for branded players and for the organized retail to grow and expand the market because in India, people have until now preferred fresh meat and so open and wet markets in meat and live bird



markets have played a major role in meat retailing. But now people are becoming aware of the hygiene and quality of processed meat and this segment is picking up wherein a huge demand is waiting to be tapped and there is plenty of scope to expand. With rapid urbanization across the country, wet meat markets will shrink and live bird slaughtering will get restricted, opine these industry players.

With supermarkets and shopping malls spreading to even Tier II and III towns, it is expected that there will be greater support for growth in the retailing of chilled/ frozen meat products. In recent years, new players have been emerging regularly, which indicates that the market size is expanding and a lot of MT stores have started selling chilled meat as well. "Modern retailers offer convenience, a wide product range and fresh products. The trend of buying through modern retailers is expected to increase in the future as the price difference between modern and traditional retailers decreases. Hygiene factors and changing lifestyles, mainly in rural India, will also hasten the shift to increased purchase of meat products from modern retail," opines **Dilip Radhakrishna, Research Analyst at Euromonitor International.**

In the pages to follow, we bring you the profiles of some cutting edge brands in the meat and seafood category and what they are doing to offer high value, technology oriented, branded packaged products that deliver convenient meal solutions to consumers.

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Creating ripples with its innovative product offerings

→ Company & Brand Profile: Chevon Agrotech, founded in 2011, is an integrated frozen food company with its Headquarters in Mumbai since 2014. Chevon Agrotech offers two brands under its umbrella: Brand ‘Chevon’ is the signature line of the products with world cuisine offerings focused on health aspects. Brand ‘Kuzo’ is a soul food and a value-for-money product range. The brands offer a wide range of products in the goat meat segment, particularly Osmanabadi goats, which are known for their superior taste and quality and preferred by meat connoisseurs.

Thanks to its innovative offerings, the brand has won several prestigious awards and accolades: It was awarded by *The Economics Times* as “Best Brand of the Year” for Retail Excellence in the Frozen Food category in 2018; Awarded by *Times Now* for being “Best Brand of the Year” for Marketing Excellence in Frozen Food in 2018; Awarded at Super Start-up Asia 2018 for “Best Start-up of the Year”.

Vision and Purpose: Chevon aims to be the preferred food company of global consumers by providing healthy and great taste experience. Its goal is to produce quality and healthy meat products and make it conveniently available to the consumer. Chevon’s processing and cold



Goat meat has emerged as the new superfood across global health food circuits. It is a healthier and tastier meat as compared to other red or white meats, offering great nutritional value to the consumers. Our products are created keeping in mind both the health and taste preferences of Indian consumers.

— Rizwan Thakur
CEO, Chevon Agrotech Pvt. Ltd.

storage facility is approved by APEDA and FSSAI and is equipped to undertake processes such as blast freezing, plate freezing, chilling, packing, and cold storage. Chevon’s supply back-end is secured by its livestock farms in Solapur, Maharashtra, where it undertakes large-scale rearing and breeding of Osmanabadi goats.



Brand’s USP and Differentiator: The United States Department of Agriculture (USDA) considers goat meat healthier than most other meats, including chicken and even turkey. To bring more value to its products, Chevon follows a signature process (PCQ) to ensure the maintenance of Chevon’s high brand standards. The PCQ process begins with the selection of the finest breed of Osmanabadi goats, with halal-certified processes followed diligently at all stages across the company’s state-of-the-art processing facilities.

The goats are farm bred and provide lean and tender meat. The meat is fat stripped to make it leaner and healthier and freshly frozen to preserve freshness. It is then vacuum packed for quality maintenance and comes with triple layer packing. Besides, the meat also boasts of convenience packing – in two individually frozen 215 gm tray packs. The product is halal meat and meant for universal consumption.

Category and Market Forecast: The Indian goat meat market is an INR 50,000 crore opportunity currently and is growing healthily. On the other hand, the frozen foods market in India has been clocking a double-digit growth in recent years and growing at a CAGR of 15-20% in the last four years (*India Frozen Food Market Outlook, 2021*). With growing consumer awareness, a large section of consumers is moving beyond the basic functionality associated with food products. They are seeking food products with incremental



nutrients and chemical free products. As such, the gourmet food market, which took its time to establish, is now soaring in India. The market, which is characterized by distinctly flavoured, high quality, fresh and beautifully packaged food products, stands at INR 15,000 crore and is growing at a CAGR of 20%.

Though the infrastructural limitation of cold chain poses a formidable challenge in an already space-starved retail place, changing lifestyles, food habits and work environment, widening palate, the rise of convenience foods, are driving the demand for frozen foods.

The customer adoption of frozen products has begun its journey from Sec A&B, towards multiple categories and is already the norm in a few categories like French fries, etc. There is also a growing shift toward global brands (due to the look and feel factor) across a majority of categories. However, when it comes to fresh and local delicacies, local brands enjoy a strong preference over global brands. Strictly speaking, there is no 'perishable' barrier



impeding the growth of global brands in these categories but still local tastes play an important part in consumers' preference for local or global brands.

Demand for the category is likely to rise from significant changes in consumer preferences such as: Greater demand for branded packaged products; willingness to pay more for healthier food; time constraints; culinary skills leading to the demand for ready-to-cook products; unwillingness to visit traditional wet markets leading to the growth of Modern Retail; increased power purchasing parity leading the demand for protein-rich foods; bold and ever-changing palate of consumers. Keeping these factors in mind, Chevon's ready to cook range with an extended shelf life is anticipated to drive future growth for the brand.

Markets and Consumer Segments: Brand Chevon's current area of focus is Metro towns and the brand is mainly targeted towards SEC A, B class of customers. Modern trade outlets and A class outlets of general trade act as point of sales.

Brand Kuzo is a pleasure food category product and hence targeted at mass non-veg eating population through general trade outlets.

Consumer Connect Initiatives: In keeping with its objective to get into

more and more households to drive up consumption, the brand is focusing on experiential marketing (taste sampling). It is also investing in driving awareness through social media engagements. It is making the products available at POS and promotes deployments inside the stores to educate consumers about the product and category.

Challenges: With limited infra at retail point and cold chains, this category has seen its share of challenges. But recent investments in this industry by larger players and support through government schemes are helping to reduce the intensity of problems. But limited infrastructure at the retail point and shortage of cold chains has been a major challenge for this category. The resistance of retailers to treat raw goat meat as a commodity product and expectations of high trading margin is making this product costlier and making it inaccessible to the majority of people.

Roadmap Ahead: Currently, the company's objective is to set up a robust distribution network across the country so that it can make its innovative products available to more consumers. To this end, the company is looking to set up distribution networks across top 500 towns by 2022. To further expand its product line and distribution for the Indian market, Chevon has now launched its brands and products in the Middle-Eastern and Southeast Asian markets to capitalise on the vast opportunities in these geographies for premium frozen foods. It also has plans to innovate its product range to satiate local appeal and taste palates considering that food taste changes every 300 km in India.

“



We are not only focusing on our products or category but also on creating awareness about frozen V/s fresh, why frozen is better, and goat meat is healthier than other meats. To create the demand for products, we are positioning ourselves as an innovative food manufacturer and making inroads in the ready to eat / ready to cook segments.

— Chandrakant K
Head-Sales & Marketing,
Chevon Agrotech Pvt. Ltd.

A one-stop solution for all canned seafood needs

→ **Company & Brand Profile:** M/s. Ashokasha Exim Pvt. Ltd operates Golden Prize, a leading brand of shelf stable seafood products in India. The company's mission is to offer the discerning Indian consumer the best canned seafood product at reasonable and affordable price points. Golden Prize is the only seafood brand to carry the whole range – tuna, sardines, mackerels and salmon – and it strives to be a one-stop solution for all canned seafood needs.

Vision and Market Philosophy: Brand Golden Prize believes that consumers should have easy access to food that is healthy, tasty, convenient and affordable. Its goal is to provide market-driven change in global harvest practices as well as impact consumer choices in seafood consumption through education.

Brand's USP and Differentiator: (a) Follows the safest and highest quality standards: All products are manufactured at world class manufacturing facilities

“



Golden Prize enjoys great patronage among seafood consumers in India – we are ranked among the best sellers on Amazon India consistently for the past two years. Our products are enjoyed by all seafood lovers across India. However, our strong consumer base is the local population in northeast India who have fish in their staple diets.

— Amit Agarwal
Director, Ashokasha Exim Pvt. Ltd



accredited and audited to the ISO and BRC global standards as well as HACCP. A can of Golden Prize tuna assures you of the purest tuna meat preserved in natural mediums without the use of any artificial preservative, colours or MSG. You are getting premium tuna that is traceable from sea-to-plate and swimming its way to your kitchen. (b) Responsible fishing: Golden Prize tuna is caught without the use of fish aggregating devices. Sourced FAD-free to minimise the by-catch effect on oceans. The catch is delivered direct to its canning and processing plants. The wild tuna catch is certified “Dolphin Safe”. (c) Meeting sustainability standards: The biomass of fish is healthy and not overfished; the habitat is not damaged by the fishing method; the catch method is free from excessive by-catch of juvenile fish and other non-targeted species; (d) Exceptional packaging: Golden Prize tuna can be easily spotted when you shop because of its lithograph-printed cans; the easy-open tab is located at the bottom to reduce the exposure of the lid to dirt and pollutants.

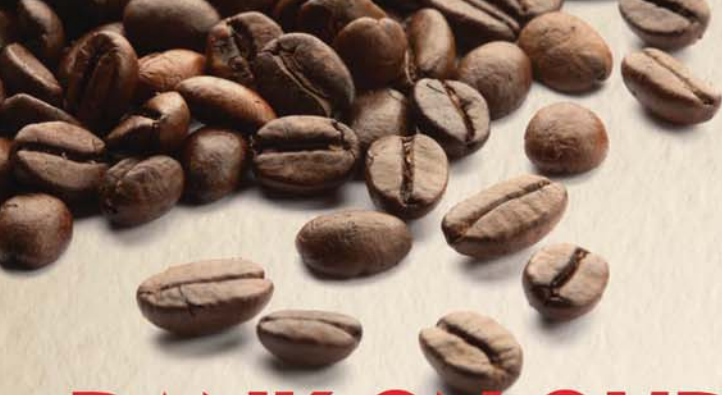
Markets and Consumer Segments: Golden Prize products are targeted at all fish eating consumers cutting across socio-economic divides. Most of the products are available nationally at various retailers, wholesalers and club stores. The brand is also present across all major e-commerce platforms that cater to demand from all across the country. East and northeast India (West Bengal, Assam and six sister states), north India

(New Delhi, Punjab, Himachal Pradesh and parts of Rajasthan) and Mumbai & Goa in the west are the strong markets for the products. The brand is already leading the category in several modern trade accounts.

Category and Market Forecast: Steady growth and growing demand for the category due to the growing awareness of the health benefits of consuming fish and fish products. Consumers are increasingly becoming aware of the benefits of Omega 3 fatty acids found abundantly in tuna and other fish. Demand for the category is likely to rise due to increased product consumption owing to health benefits coupled with the adoption of sustainable fish farming techniques by manufacturers globally.

Consumer Connect Initiatives: In keeping with its commitment of offering a strong and VFM product to the customer, the brand is focussing on BTL activities (strong presence in the modern trade, good displays and free tasting/sampling sessions). Also investing in digital marketing – initiatives include having its own Facebook page, recipe channel on YouTube, wet tasting and sampling stations at retail stores as well as tie ups with masterchefs across India to promote use of seafood in daily cooking.

Roadmap Ahead: The brand is working towards adding anchovies, oysters, shrimps, herring and catfish (all in shelf stable cans) to its portfolio by mid-2019.



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The relish of natural flavors

→ Company Profile: The Amalgam Group has been in the seafood industry for over 30 years. The company has clocked many “firsts” in the industry – from the setting up of first Freeze Drying unit in the country to the launch of the first Cold Chain logistics and one of the first Frozen Food retail brands.

Product Portfolio: Has products in the ready to cook, ready to fry, and heat & serve categories. The frozen seafood offered by its brand Buffet covers four different sizes of prawns, breaded seafood items like fish fingers, breaded fish fillets and breaded squid rings, all of which are coated with imported Japanese Panko Breadcrumbs. The same products are exported to countries like the US and sold under the Buffet brand.

For its meat products, the company works with third party manufacturers and products are sourced from Sri Lanka and Europe. The Buffet brand’s largest selling SKU (in terms of volume) is Malabar paratha. Its sausage and meats and the newly introduced chicken nuggets and chicken popcorn have also been very well received.

Brand’s USP and Differentiator: The products are absolutely free of any preservatives, additives or artificial flavors. The products’ natural flavor profiles give consumers a home-made product experience.

Markets and Consumer Segments:

The products are available Pan-India from Cochin to Delhi and all the way to Kolkata and the North-East. Although the SKUs that move well in each region varies, the Malabar paratha, sausage and meats are growing steadily and evenly throughout. The products cater to all demographics.

Category and Market Forecast:

The demand for frozen food is growing. With customers increasingly looking for a quality product that is consistent and available throughout the year, frozen food is emerging as the preferred go-to food source. Consumers are becoming aware of the quality that most frozen food brands offer and how they are more hygienically processed than what is available in ambient conditions.

“

Our biggest USP is that we do not add any preservatives, additives or flavors to our products. We work with completely natural flavor profiles, thus giving the consumers a homemade product experience.

— Sundeep Kurian
Manager Commercial - Amalgam Group

Consumer Connect Initiatives: The brand strives to drive customer loyalty through its quality offerings and the use quality ingredients. The aim is to get more and more customers try its products first and the focus in on wet sampling at the store level. It also leverages the power of social media and is currently working on launching a Pan-India level e-commerce delivery system for its range of frozen foods. The facility is limited to Cochin and Bangalore at the moment and will soon be extended across the country.

Challenges: The category faces operational challenges in terms of cold chain management. At times, distributors have been at fault for delivering the products in open boxes where the product reached the freezer almost thawed. Retailers have been found to switch off the freezer at night in order to save electricity, which creates a severe quality issue for frozen products. To prevent such mishandling, the company educates the distributors on efficient cold chain management and ensures that those with a frozen food background are the only ones handling its products. Though the operations in most metros are adequate, it is the suburban areas where such deficiencies take place.

Frozen foods brands are competing to place their products in the limited freezer space available. Also, retailers and distributors find it hard to provide adequate floor space for freezers, manage power consumption charges for running large freezers and the storage of products at a consistent -18C temperature. These factors limit the potential for growth in this sector.

Roadmap Ahead: Plans are afoot on launching stand-alone stores for its products across the country, which will enable it to place its entire range of 85 SKUs in its stores and also act as storage points for its e-commerce delivery system. **PG**





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Good Eggs

Producers, brands get cracking on innovations that appeal to consumers.

By Lynn Petrak

“

There is also a protein story to tell with eggs. Eggs are all-natural, high-quality protein.

— Ashley Richardson
American Egg Board

For a food that doesn't stand upright, the egg doesn't seem to need much help staying on top these days. Per capita consumption of eggs is expected to hit 274.6 in 2017, up from 267.4 in 2016 and 252.9 in 2015, according to the U.S. Department of Agriculture (USDA).

Once associated with breakfast and as an ingredient in various hot dishes and baked goods, eggs are being consumed in more ways and on more days. “What we are finding is consumption across all ages is up, and not just at breakfast, but at lunch and dinner,” notes Ashley Richardson, senior director of marketing and communications for the Chicago-based American Egg Board (AEB).

Despite seasonal volatility in egg prices, the simple fresh egg — once by and large a foam-container commodity at retail — is more diverse and

innovative in form, packaging, merchandising and applications. “The trends in the market are reflected in the mix of products at retail,” says Kristin Herzog, chief marketing officer for San Francisco-based Happy Egg Co. USA, noting the cage-free, pasture-raised, caged, liquid eggs, hard-cooked eggs and egg replacements that are part of the current market.

For Goodness' Sake

The uptick in egg consumption and accompanying product diversity can be attributed to a variety of factors in the marketplace, particularly burgeoning interest among consumers in foods deemed wholesome and healthy.

Those broad descriptors cover a lot of attributes that apply to egg products sold in supermarkets.

Consumer demand for the humane treatment of hens is one major influencer in the current egg marketplace. In recent years, hundreds of grocers and manufacturers have switched to or expanded cage-free egg offerings or production, according to the USDA, with an optimal timetable of 2020-25 for conversion.

Despite the fact that cage-free hens are currently producing about 10 percent of the total egg supply, and that cage-free eggs require considerable investments by farmers and producers to be passed on as a higher price point for consumers, sales of cage-free eggs are continuing to climb, while other product-related claims, like pasture-raised and free-range, are also emerging and expanding.

Earlier this year, Boise, Idaho-based Alberstons Cos. revealed the expansion of its commitment to carry only cage-free eggs by 2025 to include liquid eggs. “Broadening our cage-free commitment will keep the conversation going and, hopefully, continue the industry's work in humane sourcing and corporate social responsibility,” remarked Shane Sampson, chief marketing and merchandising officer, at the time of the announcement.

Fresh Thyme Farmers Market, a Chicago-area-based specialty retailer that focuses on healthy and organic products, pledges to sell 100 percent cage-free eggs by 2022. “My customers are buying more cage-free eggs than ever before. They are ‘voting’ for



cage-free with their purchasing power,” notes Simon Cutts, director of grocery, adding that the company recently updated its own brand packaging to call out cage-free eggs.

For their part, many egg companies are zeroing in on consumers’ interest in, and knowledge of, humanely produced eggs. NestFresh, a Denver-based producer of sustainable, local, humane and natural eggs, recently launched a line of pasture-raised eggs, including organic, non-GMO and soy-free offerings, which has earned Certified Humane Verification from Herndon, Va.-based Humane Farm Animal Care.

From her perspective of working with a brand specializing in free-range eggs, Happy Egg’s Herzog sees a parallel track in demand and education. “Alongside interest in humanely raised eggs, there is more interest in understanding certifications and claims in egg packaging,” she says, adding that consumers seem to link humane treatment and taste. “There are differences in how eggs are laid, but there is also a flavor and quality difference in humanely raised eggs.”

In addition to production-related concerns about wholesomeness, the current market for eggs consumed at breakfast and, increasingly, at other times of the day, is shaped by interest in foods that are naturally high in protein. According to the Washington, D.C.-based International Food Information Council Foundation (IFIC), more than two-thirds (64 percent) of consumers say that they’re trying to consume more protein, compared with 54 percent in 2015.



“Eggs are already a household staple — Nielsen data shows household penetration is at 94 percent — but there is also a protein story to tell with eggs,” asserts AEB’s Richardson. “Eggs are all-natural, high-quality protein.”

In contrast to dietary concerns about eggs in the 1980s and into the ‘90s, today’s consumers recognize their benefits. “Eggs, along with dairy and meat items in the refrigerated case, are well positioned to capitalize on these trends,” says Brandy Gamoning, marketing manager at NestFresh “Featuring a single ingredient or a short list of whole-food ingredients,



these items are seen as inherently natural and an easy step to cleaning up and simplifying diets while providing protein.”

Beyond protein, eggs are rich in other nutrients — some more than others. Eggland’s Best brand claims that its eggs provide 10 times more vitamin E, more than double the amount of vitamin B12, six times more vitamin D, double the omega-3 and more lutein, among other nutrients. “The extra nutrients in our eggs come from special feed given to our hens,” explains Dave Holdsworth, VP, marketing at the Malvern, Pa.-based company, citing the hens’ all-vegetarian diet comprising healthy grains, canola oil, and a special supplement of rice bran, alfalfa, sea kelp and vitamin A.

Health-and-wellness concerns are spurring innovation in various types of egg replacements and alternatives as well. “In addition to the allergy/sensitivity community, we have seen considerable growth in the number of vegans and plant-based consumers, which has reflected positively in the demand for more options and improved alternatives,” says Katherine Franklin, director of marketing for Canoga Park, Calif.-based Follow Your Heart, which offers a pourable liquid egg replacement called VeganEgg.

Meanwhile, given people’s penchant for all-day snacking, the ready-to-eat hard-cooked egg segment is worth watching within the overall egg category. “Although only hard-boiled eggs are overall still a small portion of the market, we are starting to see large growth,” says Richardson. “We’re encouraged by that, especially with consumers who want what they want when they want it.”

“Further changing the way consumers eat, snacking has overtaken meals altogether,” agrees Gamoning, adding that NestFresh now offers a variety of hard-cooked eggs, including organic and cage-free SKUs.

At Eggland’s Best, Holdsworth also points to the spike in demand for convenience foods, which has fueled interest in the company’s hard-cooked and peeled-egg products. Eggland’s Best introduced organic hard-cooked peeled eggs earlier this year. **PG**

“

In addition to the allergy/sensitivity community, we have seen considerable growth in the number of vegans and plant-based consumers, which has reflected positively in the demand for more options and improved alternatives.

— Katherine Franklin
Follow Your Heart



Omnichannel Made Easy

Omnichannel communication connects with customers by placing them at the core of the marketing strategy of a brand or modern retailer. Such an approach delivers personalized conversations via interconnected channels to create a unified experience that synchronizes naturally with the consumer's journey in the marketplace. Progressive Grocer observes one such digital solution offered by online shopping app Fynd and the functional principle it is based on.

Omnichannel seeks to provide customers with a seamless shopping experience, whether they're shopping online from a desktop or mobile device, by telephone, or in a brick-and-mortar store. The term itself may be a marketing buzzword, but it refers to a significant shift: marketers now need to provide a seamless shopping experience, regardless of channel or device. Consumers can now engage with a company in a physical store, on an online website or mobile app, through a catalog, or through social media. The entire process entails viewing the business model through the eyes of the customer, orchestrating the customer experience and rendering it more integrated and consistent. It anticipates that customers may start in one channel and move to another as they progress to a resolution or buying decision. Making these

complex 'hand-offs' between channels fluid for the customer is what omnichannel retailers aim to do. According to research from Vantiv, young adults aged 18-34 are more likely to own a smartphone and are more likely to use mobile devices to cross traditional channel boundaries when shopping. The spending power of Millennials is growing as they enter their peak earning years, meaning that cross-channel interactions from these consumers are expected to grow as well. But it's not just Millennials that are crossing traditional channel boundaries. The research also identifies that a significant number of older consumers are also adopting the attitudes and expectations of omniconsumers. There are pockets of older consumers that have a youthful enthusiasm for mobile payments, while higher-income consumers are also more likely to be interested in cross-channel behaviors. As consumers become more comfortable using their smartphones and tablets, they will become increasingly comfortable interacting with a brand on their devices. A senior citizen looking to buy a smartwatch might be texted a recommendation by a grandchild, then walk into a physical store to purchase. That same grandchild, on the other hand, might spend weeks parsing smartwatch reviews, adding, then abandoning items in their cart on both mobile and desktop, before finally purchasing because of an enticing e-mail offer. It is imperative that brands and retailers realize this erratic browsing and buying behavior and adapt their strategies to accommodate the modern consumer. Marketing approaches must be geared and oiled to enable customers to convert on any channel while interacting with a brand. There are a number of online tools that can assist brands in targeting a vacillating audience via a number of outreach programs to ensure brand visibility.

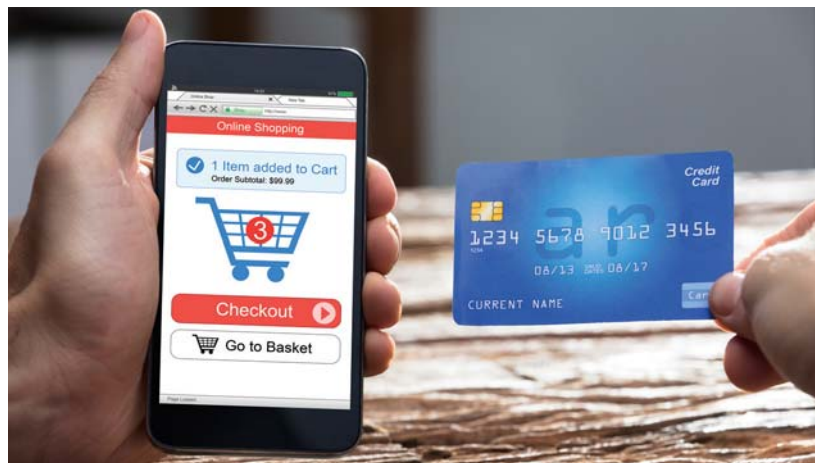
Online fashion startup Fynd follows an online-to-offline model, where it showcases fashion products from a brand's in-store inventory on its app. Essentially, it allows consumers to choose products from a neighborhood store, based on their respective location. The company picks up the product from the stores and delivers them to consumers. Fynd also dabbles in hardware. It also developed Fynd Store, a screen that allows consumers to browse all products sold by a particular brand. These screens are placed inside the brand stores. A variant of a product that is unavailable in a particular store can be ordered on Fynd Store and sourced from the nearest outlet that stocks the product. While acting as omnichannel partner for fashion label AND, Fynd was able to help plug in lost sales due to unavailability of the product and act as a digital catalog for customers to

browse and shop from. This provided 99% catalog coverage and produced a 2% increment in sales while approximately saving 6-8% sales. An impressive tech-platform such as Fynd has tremendous potential to scale within and beyond fashion in India. A store-driven commerce approach, without inventory and warehousing, such as the one used by the innovative app has a unique position in the marketplace and can serve to influence food and grocery retail as well.

An online multi-store platform acts as a promising omnichannel solution as it overcomes the challenge of low brand coverage due to unavailability of product images and enables customers to search for brands on an image less and hidden product catalog. It also addresses the persistent customer complaint related to product search using an item code or human memory. Consumers can use an online channel to scan barcodes or enter key product attributes in an app to locate a product

When retail and wholesale channels are integrated into one omnichannel strategy, system or fulfillment program, retailers and brand merchandisers can better control their purchase orders, stock counts, sales data, shipping fulfillment information from a single platform. Moreover, this new channel to create more innovative work flows and manage more complex systems and this level of visibility would be significantly important to warehouse management. To systematically implement omnichannel customer-touch points, a seller needs to understand the target market and capitalize on group-specific data points. It helps to segment the audience using market automation and build rich profiles about customers and their buying preferences. Marketing teams must develop content/messaging that addresses variable cases and behaviors. For example, if a customer has put something into a cart, but hasn't purchased it yet, targeted marketing content must focus on

Retailers and brand merchandisers can better control their purchase orders, stock counts, sales data, shipping fulfillment information from a single platform.



in their vicinity. An integrated solution using impressive media also solves technical glitches much more efficiently while placing orders and making payments. The omnichannel method enhances customer experience and also enhances the brand performance by providing complete and easy-to-locate product lists in an organized, methodical fashion. An online service partner can also track orders at the store level and link consumers to end-to-end order tracking solutions, thus reducing dependency on consumer support. Another advantage of this strategy is that it brings about a 24-hour access to the customer, which helps build brand loyalty. Retailers also benefit from omnichannel by improving analytics to understand consumer behaviors since building a personalized customer experience is a must in the digital age. Cross-channel inventory visibility truly unlocks the key of a successful omnichannel retail system.

referencing that intent. By adapting a systematic and well-designed omnichannel strategy best suited to a seller's business landscape, both front-end and back-end chains can be better executed to maximize profit.

Technology has wholly disrupted the retail industry and has majorly impacted marketplace interactions. Consumers are no longer loyal to a single brand or type of shopping. They now shop in an omnichannel fashion, sometimes buying on a mobile device while in a brick-and-mortar store, or browsing a marketplace before heading to a category-specific site. Today, India's hyper-connected consumers expect businesses to provide unparalleled and consistent communication and service across all touch points. The mobile revolution, increased digitization and e-commerce have together played a significant role in changing the face of retail as we know it. The result? Omnichannel is growing in popularity and redefining the retail experience. **PG**



Demystifying the hype

Omni-channel has been the retail industry's buzzword for the better half of the last decade. Across boardrooms, investors' calls, business planning meetings and in-store, the term omni-channel comes up as a perennial agenda item for most organized retailers across the world. But the reality is that whether you call it omni-channel, multi-channel, experiential retail or even new retail, very few brands and retailers have a cohesive idea of their physical + digital roadmaps and, more importantly, what this new way of servicing customers can really do for a retail business.

By Premjit Mohapatra



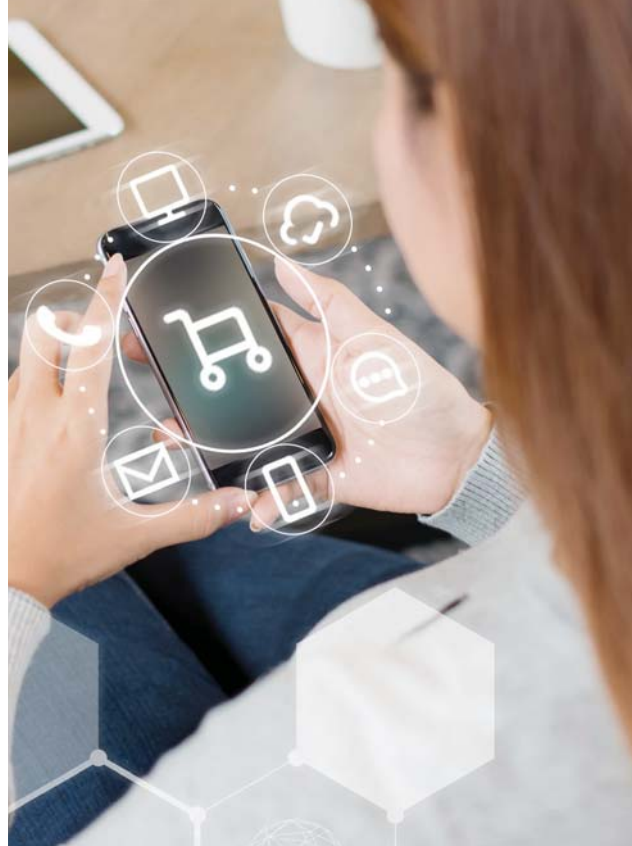
We need a well-sequenced approach to get the ROI from our business. For this, we need to act on the omni-channel playbook. A key principal of the omni-channel model is to keep the business features centred around consumers.

— Mukul Bafana
Co-founder and CEO,
Arvind Internet

While omni-channel visionaries paint the future of seamless, high-tech, intra-session, cross-channel journeys across the purchase funnel, most retailers must still grapple with the brass tacks realities of defining their omni-channel vision and making the right ground-zero decisions to realize it.

Amongst all the noise of new channels, e-tail innovation, in-store technologies, and omni-vanity metrics, retailers who excel in this new way of selling find a balance between the existential reality of doing omni-channel versus getting sucked into a vortex of investments with lacking returns. Against the backdrop of day-to-day realities of hyper competition, rising retail costs of business, and productivity, these retailers are able to draw clear lines between the must haves, nice to haves, and pies-in-the-sky omni-channel journeys to focus their retail transformation efforts. These retailers also look beyond the technology and treat omni-channel as a fundamental change management process in their organizations to achieve the true benefits.

At an industry event, panelists comprising stalwarts of the retail industry, took a hard look at the true essence of omni-channel beyond the buzzwords, hype, and outside-in esoterics. Specifically, the panel addressed hard-hitting topics for retailers and articulated the view points of industry practitioners who have delivered customer delight and ROI on omni-channel. The panelists were: Anshu Dubey, Executive Director, Distribution Sector, IBM; Atul Madan, Director



Retail, SSIPL; Deven Pabaru, Chief Strategy & Implementation Officer, Stellar Value Chain Solutions; Kavindra Mishra, MD & CEO, Pepe Jeans; Uma Talreja, Chief Digital Officer, Raymond; H.S. Sidhu, President, Mufti; Pooran Jaiswal, CTO, Globus Stores; Jaideep Shetty, Co-founder & MD, Minerals Fashion. The session was moderated by Mukul Bafana, Co-founder and CEO, Arvind Internet and Harmeet Bajaj, Fashion Academician, Consultant and Partner, Impresario (Social).

To put things in the context, Mukul Bafana started by talking about how retailers can get their omni-channel strategies right. “We need a well-sequenced approach to get the ROI from our business. For this, we need to act on the omni-channel playbook. A key principal of the omni-channel model is to keep the business features centred around consumers. We need to understand our customers’ needs and build the appropriate channels to help them in their shopping journeys. Omni-channel is a transformation journey, so the playbook needs to be sequenced in a manner that helps us create a futuristic roadmap.” Expanding on the omni-channel theme further, Harmeet Bajaj asked the panelists about their omni-channel journeys and to share their experience.

Atul Madan of SSIPL spoke about Nike’s omni-channel journey and said, “We run close to 170 stores for Nike in India and we are concentrating on maintaining hygiene in inventory and supply chain. We rolled out our omni-channel strategy about 18 months ago, and it has given us incremental sale of around 5-7 per cent even though our omni-channel



We rolled out our omni-channel strategy about 18 months ago, and it has given us incremental sale of around 5-7 per cent even though our omni-channel model is nowhere competing with the e-commerce business of the brand.

— **Atul Madan**
Director Retail, SSIPL



Technology intervention should add to the consumer experience. Within six months, we are planning to come out with e-commerce and omni-channel retail interfaces.

— **Kavindra Mishra**
MD & CEO, Pepe Jeans



Omni-channel is a journey from brick to clicks. The roadmap of a brand needs to be very clear about where you want to lead so that your various formats or alternate channels don't cannibalize each other's business.

— **Anshu Dubey**
Executive Director, Distribution Sector, IBM



A lot of us talk about omni-channel as a supply and fulfillment experience and there are lots of operational efficiencies related to it. But we believe that we need to gauge and regain consumer trust and experience to save the sales.

— **Uma Talreja**
Chief Digital Officer, Raymond



We all are multi-channel and my idea of omni-channel is to navigate between the mediums. Our omni-channel strategy is at a nascent stage but we are focused on making it big. I will lead my omni-channel strategy from my stores.

— **H.S. Sidhu**
President, Mufti



We have been looking to ramp up sales from our shop-in-shops and in a couple of months we will be launching an app that will help us to generate more sales by assuring greater accessibility. It will help drive our sales strategy from online to the store.

— **Jaideep Shetty**
Co-founder & MD, Minerals Fashion

model is nowhere competing with the e-commerce business of the brand.”

Kavindra Mishra of Pepe Jeans talked about how omni-channel adds value to the consumer experience and the importance of inventory turnover operations. “Technology intervention should add to the consumer experience. Within six months, we are planning to come out with e-commerce and omni-channel retail interfaces.” Anshu Dubey of IBM gave his take on omni-channel. “Omni-channel is a journey from brick to clicks. The roadmap of a brand needs to be very clear about where you want to lead so that your various formats or alternate channels don't cannibalize each other's business.” Uma Talreja of Raymond said: “A lot of us talk about omni-channel as a supply and fulfillment experience and there are lots of operational efficiencies related to it. But we believe that we need to gauge and regain consumer trust and experience to save the sales.”

H.S. Sidhu recounted his experience of how Mufti is marrying the omni-channel strategy between COCO and FOFO stores. He said: “If any franchisee is serving on behalf of other franchisee, I have no problem in giving extra margins to them.



We all are multi-channel and my idea of omni-channel is to navigate between the mediums. Our omni-channel strategy is at a nascent stage but we are focused on making it big. I will lead my omni-channel strategy from my stores.” On his part, Jaideep Shetty spoke of the omni-channel strategy of Minerals Fashion. “We have been looking to ramp up sales from our shop-in-shops and in a couple of months we will be launching an app that will help us to generate more sales by assuring greater accessibility. It will help drive our sales strategy from online to the store.” **PG**

Listen and Learn

Grocery retailers must understand deeper motivations behind purchasing behavior.

By Pete Killian and Linda Deeken

As one looks across this year's Consumer Expenditures Study, one can certainly be tempted to focus more energy on the "what" than the "why" of the data.

Clearly, there are useful learnings to be gleaned from the trends of specific channels, for example, the continued growth of other retail channels at the expense of traditional supermarkets. But far more important and, frankly, actionable is the "why" behind the trends that are uncovered by a review of the data.

At a category/product level, the insight when reviewing expenditure data is quite straightforward: Categories that align with consumer demand are growing, and those not aligned are declining.

Five key areas specifically caught our attention, and underscore deeper consumer motivations that will only continue to impact the competitive landscape:

- **Fresh is foremost:** Fresh produce and proteins continue to account for the majority of supermarket growth, while categories dominated by canned/shelved/boxed items are struggling. As consumers continue to gravitate to "real foods" and

easy-to-understand ingredient lists, this trend will continue. Making different choices with key center store items while simultaneously driving private brands will be necessary to capitalize on this trend.

- **The health halo:** Health perception is reality, and health-driven categories are growing (fresh, organic, healthy snacks), while products with perceived compromises lag. Meeting shoppers' demand for a health "intellectual alibi" is critical, but overstepping on maximum health credentials will not pay dividends.
- **Excellent experiences:** Alcohol and party foods won out over pantry-filling items last year, a continuation of the consumer's appetite for new "experiences." Supermarkets that note this need, and assort and merchandise around events/parties/celebrations, will enjoy a warm reception from consumers.
- **Instant gratification for the win:** What used to be a need for convenience has evolved into demand for instant gratification on the go (e.g., meal kits or cereals), continuing to win out over time-intensive foods tied to a place. Many supermarkets are quickly moving to this offering, but being first to market convenient products, highlighting



Fresh produce and proteins continue to account for the majority of supermarket growth, while categories dominated by canned/shelved/boxed items are struggling.



prepared offerings and even innovating private-brand packaging to be ever more convenient will all add marks in the “W” column.

- **New is nice:** Interestingly, categories driven by small/new brands are driving growth, while those categories dominated by national brands are often in decline. While some might argue the correlation with the less loyal Millennial population, the trend is more pervasive than that, and consumers, as noted above, are fundamentally seeking new experiences, new products and new brands with which to foster relationships they can be proud of. Investing to prominently display new brands and products ensures that retailers are seen as on the leading edge as well.

At a more aggregate channel level, it should come as a shock to no one that the “Amazon effect” has made an impact on the traditional grocery channel this year, with the e-commerce giant stealing share in the predictable stock-up, bulk and subscription-potential categories.



The truth – and, arguably, staying power – of this trend has brought about such industry moves as Walmart’s purchase of Chewy.com for \$3.4 billion. Yet traditional grocers, fear not: Grocery will most certainly remain, but increased focus on impulse purchases and destination categories will be critical to grocers’ long-term financial health.

In addition, traditional grocers must also appreciate the losses coming from growing nonfood categories such as personal care and cosmetics. While Amazon has not as significantly impacted these categories, the explosion of points of distribution (drug/c-store/dollar formats) and growth of specialized competitors (e.g., Dollar Shave Club) certainly have. The reality is that while supermarkets have temporarily slowed losses against others via heavy promotions and similar tactics, this is not a sustainable strategy.

In the face of these category and channel pressures, we offer five key strategies around which traditional grocers must innovate to get ahead of accelerating customer demand:

- **Prioritize categories to win – and optimize others for profit:** Develop and execute category roles to sharpen what to stand for (e.g., fresh, convenience) and what to drop (e.g., general merchandise).
- **Specialize with smaller formats:** Niche formats are 75 percent of supermarket footprint growth, and dollar/c-store/drug/discount drove most of the overall retail footprint growth in the past decade. The reality is that grocers can no longer win with a “big and generalist” proposition.
- **Localize:** Small grocery operators know their customers better than massive players do, but ownership and/or systems need to be in place to respond with sensitivity and speed to customer demand. Vendor partnerships are critical to localize effectively.
- **Build a moat on experience and service:** Lean into the inherent advantages of the grocery format by making statements and experiences across the store with superior merchandising and service. For example, health and beauty and pharmacy are experiential, service-intensive and growing, but grocery isn’t meeting customer expectations – yet.
- **Partner on digital:** Smaller grocers should partner with established digital players to get ahead of customers’ accelerating expectations and maximize the experience for customers.

Small grocery operators know their customers better than massive players do, but ownership and/or systems need to be in place to respond with sensitivity and speed to customer demand.

Progressive Grocer’s Consumer Expenditures Study once again highlights both successes and opportunities for the mindful and diligent reader. Consumers speak clearly with their dollars – the real question is, are we truly listening? **PG**

Pete Killian is a principal and Linda Deeken is CMO of The Cambridge Group (www.thecambridgegroup.com), a growth strategy consulting firm owned by Chicago-based Nielsen.

“Our seafood products are seeing higher growth due to our omnichannel retail presence”

Cambay Tiger, the flagship brand of the WestCoast Group, is a leader in seafood across the country with a presence across all channels of trade. The brand caters to both fresh and frozen categories, and aims to become the largest player in seafood e-commerce space. **Rajesh Srimalani, CMO, Cambay Tiger**, spoke to *Progressive Grocer*, about the trends in the domestic seafood market, his company's product offerings and strategy to expand its footprint.



There is a growing awareness in favour of seafood, and greater acceptance of marinated and ready-to-cook formats of foods. Our e-commerce launch and its expansion are designed to meet this changing reality.

—Rajesh Srimalani
CMO, Cambay Tiger



Describe your company and its business in the meats and seafood trade.

Cambay Tiger is the leading brand for seafood across the country and the only seafood brand present across all channels of trade. Our frozen products are available through modern trade, general trade and HoReCa across 15 cities. Our direct-to-consumer channels, through our own stores and e-commerce, cater to both fresh and frozen categories and have been growing quite rapidly.

What are your product's USP and features that consumers strongly identify with?

As India's only vertically integrated seafood company, we have immense control over the quality of our products. We grow our own seafood and follow sustainable practices that minimize our environmental impact. We retail seafood such as prawns, tilapia and basa, reared in our own farms in a well-monitored environment. By investing in state-of-the-art tankers to transport live fish from our farms to customers directly, we give them a true



farm-to-fork experience with guaranteed traceability. This builds the confidence of consumers in the freshness and quality of our products.

What is your opinion about the growth potential of the domestic seafood market?

India's Rs. 2.84 trillion seafood market is estimated to grow at a compounded average rate of 8% between 2016 and 2021. There is a paradigm shift in people's preferences in metro cities as they prefer buying seafood from modern retail outlets due to hygiene, quality, and convenience factors. Our formidable presence in metros such as Mumbai, Delhi, Kolkata, Pune, Bengaluru, Chennai and Hyderabad means that we enjoy higher growth rates owing to our omnichannel presence through retail. Also, the high-quality protein is currently not affordable for a large section of the population, and we see enough scope to increase its accessibility in smaller towns surrounding the metros through distribution techniques and make the product more affordable.

Which factors are responsible for demand in your product category picking up?

There is a growing awareness of the health benefits of seafood. Stringent food labelling laws by FSSAI and government initiatives to standardize food quality and regulation inspires confidence in consumers to move to healthier choices. The rapid growth of e-commerce across categories in India, which makes seafood readily accessible, has drawn interest to the category and is driving demand.

Tell us about your future plans?

To make seafood easily accessible, we are investing in our direct to consumer channels and innovating a new line of products for hassle-free, quick, ready-to-cook meals (marinated and breaded). Our new range of marinades reduces the preparation time by 50%. As for the promotional strategy, we rely on on-ground activations such as retailer events and community events and engage and educate the customers on how to buy, store and cook seafood using tools such as chef workshops, videos, recipe booklets, SMSes and e-mailers. **PG**



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what's next



▲ Terra Chips' new healthy snacking range

Adding to its list of healthy snacking, The House of Terra Chips has put together a great range of snacks menu – Rainbow Chips Platter, Ditch your Regular Soda, Fruits for the Fitness, Nutty Affair, Dessert to Devour – to turn any gathering into a guilt-free gala. The visually appealing chips platter is high on both taste and fitness factor. This appealing menu is high on nutrition and is sure to win you praises.

► Noodles from Thai Chef

Thai Chef, a brand operated by M/s. Thai President Foods PCL (the largest instant noodle manufacturer in Thailand) offers Oriental style instant noodles in exciting flavors such as Chicken Curry, Shrimp, Duck, Tom Yum, Seafood, Chicken+Mushroom and Yellow Curry. These are available in 70 gm packets as well as 100 gm Jumbo packs. The range is available at all major e-commerce platforms and select retail stores in the states of Delhi/ NCR, Maharashtra, Goa, Karnataka, Kerala, West Bengal and the North East. Thai Chef products are exclusively imported in India by M/s. Ashokasha Exim Pvt. Ltd. and retails at two price points – Rs. 39 and Rs. 59.



◀ Chocolate for festive gifting

Pee Pee Group, a leading manufacturer of coin chocolates under the Nature 'N' Nature brand, has launched new varieties in their chocolate coin range for the upcoming festive season. The two new variants feature Strawberry and Caffe Coin made from premium milk chocolate. These product additions are rich in taste. Caffe has natural coffee bean powder, which is ideal for festive and wedding gifting. The products are suitable for consumption by children and adult alike and are available at all major retail stores in India.



► Festive gifting with Typhoo tea

Those looking for an assortment of fine organic herbal tea need to look no further than Typhoo's Organic Herbal Box. It comes in four variants – Night Time; Root Remedy; Slim Tea; and Peppermint. The box is priced at Rs. 650. Typhoo's Green Tea Gift Box is another excellent product for celebrating the goodness of green teas. The Green Tea Gift Box comes in six variants – GT Lemongrass; GT Tulsi; GT Lemon & Honey; GT Jasmine; GT Natural; and GT Moroccan Mint.



▼ Sleepy Owl launches two new coffee flavors

Sleepy Owl, India's leading cold brew coffee brand, has introduced two brand new flavors – Dark Roast and Light Roast – to their expanding range of cold brew coffees. The Dark Roast is a bittersweet heavy-bodied coffee with low acidity. The Light Roast caters to consumers who prefer light, fragrant, floral or fruity coffee notes. The Light Roast will be a pure flavor mellow-bodied coffee with crisp acidity and bright flavors. The products will be available across the country at major modern outlets such as Modern Bazaar, Le March, Foodhall, etc.



▼ Lip smacking flavors of makhanas

Nutty Yogi, a natural and organic food brand, has launched four unique flavours of makhanas high on flavour and texture. Nutty Yogi has over 150 products from home-made pickles to wholesome flours, alternative sugars to asli spices, healthy munchies to breakfast muesli's and much more in the pipeline. When hunger strikes, you can enjoy this crunchy little seed in four flavours: Minty Peppery Zesty Makhana, Sour Cream & Onion Makhana, Smoked Caramel Makhana and Himalayan Black Salt & Pepper Makhana. The product is priced at Rs. 79 per 40 gm and available at www.nuttyyogi.com



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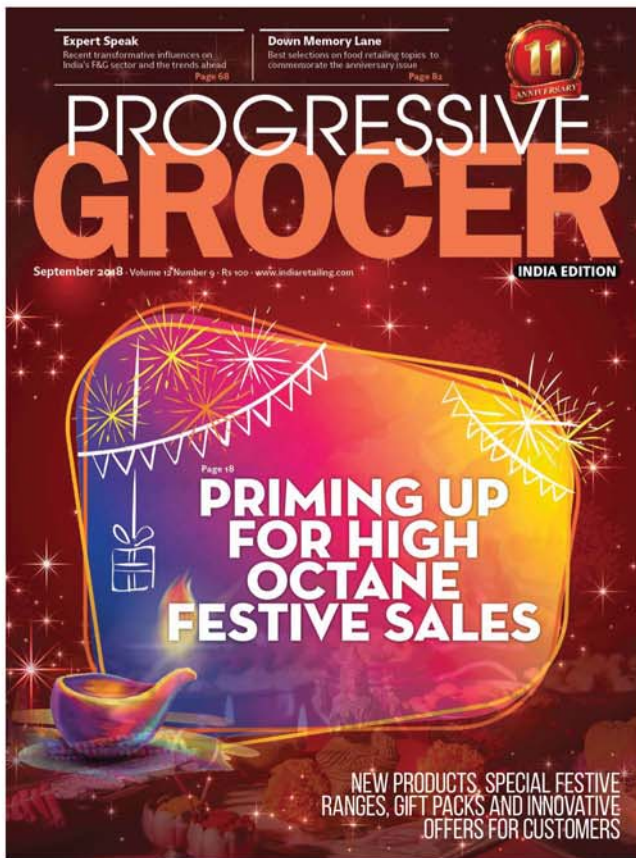
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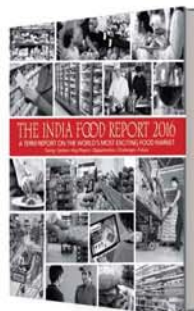
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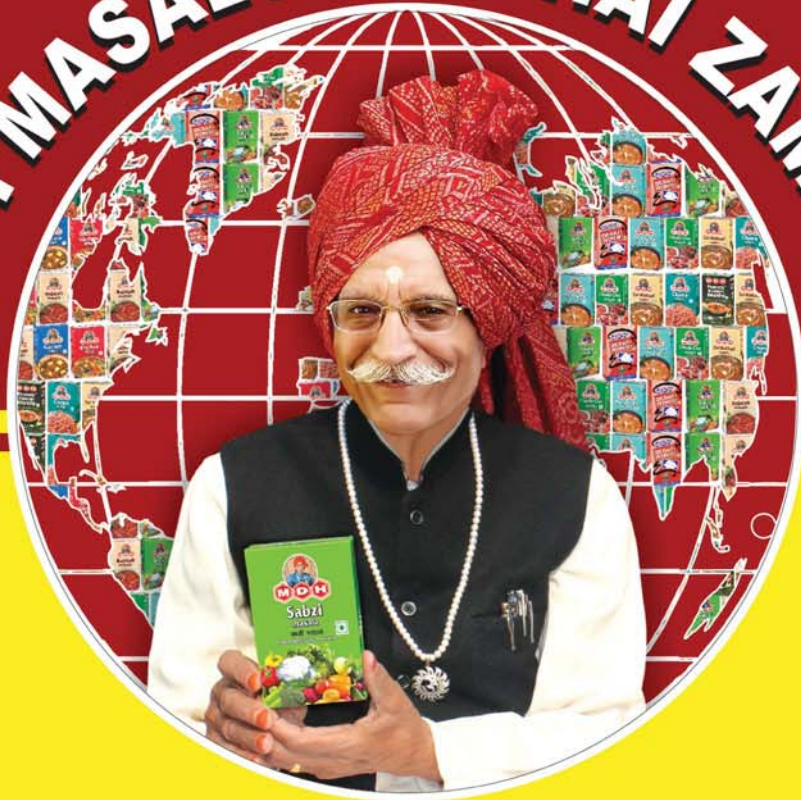
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