

Health

Indians consume twice the recommended WHO guideline on salt/sodium consumption

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The demand for proteins for food and feed, is opening up opportunities for players

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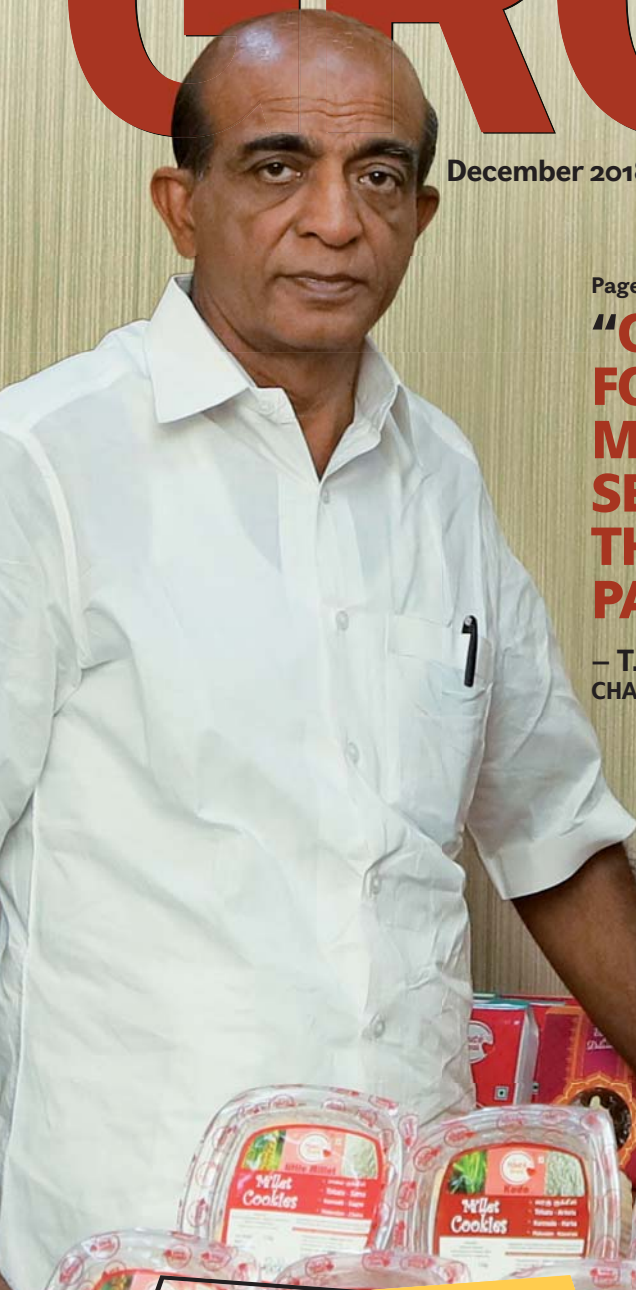
Grocers desiring repeat customers need to make shopping more personalized

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PROGRESSIVE GROCCER

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INDIA EDITION



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“OUR STORE SIZE, FORMAT, PRODUCT MIX IS DECIDED AFTER SERIOUSLY STUDYING THE CONSUMPTION PATTERNS”

– T. THANUSHGARAN
CHAIRMAN, KANNAN DEPARTMENTAL STORE



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CHOCOLATE & CONFECTIONERY

There is a growing demand for functional chocolates that are high on nutritional value.





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Editorial Director: **R S Roy**

Publisher: **S P Taneja**

Editorial

Editor in charge: **Sanjay Kumar**

Reporter: **Aliya Jamal**

Creatives

Art Director: **Pawan Kumar Verma**

Dy. Art Director: **Deepak Verma**

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Production

Sr. General Manager: **Manish Kadam**

Asst. Manager: **Ramesh Gupta**

Support

Sr. General Manager - Administration: **Rajeev Mehandru**

Subscription

Deputy Manager—Subscriptions: **Kiran Rawat**

ADVERTISING

Business Head & Associate Publisher

Lokesh Arora, Sr. Vice President

lokesharora@imagesgroup.in | Mob: +91 9999033612

DELHI	Ridhi Sood , Asst. Manager
MUMBAI	Santosh Menezes , Regional Head Savita Vasandi , Sr. Manager
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CONSUMER CONNECT

Anil Nagar, Vice President

anilnagar@imagesgroup.in, Mob.: +91 9811333099

Membership Team: Priti Kapil Sarika Gautam

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It's that time again: the exciting transition of embarking on the unknowns of a new year while one reflects on the accomplishments of the past 12 months.

With competition in the grocery space becoming more fierce than ever before, retailers will be duking it out over how best to deliver on shopper need states. Stores are going to be reconfigured, new services created. From home delivery and meal kits to prepared foods and in-store experiences, grocers will be focused on innovating the best means to the shopper's end. Mergers and alliances will be less about expanding market share and more about leveraging complementary competencies to better bring consumers what they want, how they want it.

The largest traditional grocers and the industry's usual pacesetter will be looking more concerted at the expansion of private labels, meal kits, digital, home delivery, new stores, price cuts, new sustainability initiatives, and courting of local suppliers. They will be relying increasingly on investments in insights to make their customer-first elements faster and more aggressive.

As a new year looms ahead, grocery retail has a responsibility to offer potential products and services that aligns with its customers' goals. It's a surefire way to build trust with your shoppers that will last, regardless of whether the New Year's resolutions are achieved.



Amitabh Taneja
Editor-in-Chief

All feedback welcome at editorpgindia@imagesgroup.in

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COVER STORY

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Shri Kannan Departmental stores powers ahead with a customer-centric visionary approach

"Retailing is a tough and competitive business but we have been able to reap good profits," says T. Thanushgaran, Chairman, Kannan Departmental Store, which operates 32 stores in Tamil Nadu spanning 7,67,452 sq. ft. of retailing area across convenience, supermarket, hypermarket and wholesale formats.



CATEGORY WATCH

Confectionery

30



A sweet business, full of beans

India's love for all things sweet is expected to push the demand for chocolate products even higher in the coming years. With the increasing health awareness levels among consumers, the confectionery sector is expected to witness a growing demand for functional chocolates that are high in nutritional value. Health consciousness has certainly caught the attention of manufacturers as a result of which the market is seeing cereal bars being introduced, which are currently amongst the fastest growing category in the Indian confectionery market, even while toffees, candies, caramels and nougat continue to record faster growth.

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Market Update

Foodhall opens its biggest store in Mumbai



Future Group's premium lifestyle and food superstore, Foodhall, has launched its sprawling second outlet at Mumbai's Linking Road, spread across 25,000 sq. ft. The new store enjoys the privilege of being the largest yet in the country and is designed to offer exclusive concepts and an unmatched experience through its four levels, each offering novelty from across the globe. The experience starts at the Lower Level that houses Café by Foodhall, the Cake Shop, the Meat Market, the World of Cheese, Antipasti; Oliveology, ARQA, World of Nuts, the Blue Ribbon Gift Shop and the Chocolate Library, the Cheese Cellar and the Wine Cellar. The Cafe at the Lower Level is a 60 seater chic space with an eclectic curation of dishes made with the finest hand-picked ingredients, including salads, sandwiches, meal bowls, waffles, churros, pancakes, sushi, tempura, donburi and much more with a special focus on artisanal coffees. The Cheese Cellar is dedicated to over 100 varieties of cheese spanning 20 countries with experts who will help you assemble cheese and antipasti platters paired with wines and charcuterie for your parties. Oliveology, an exclusive selection of

artisanal oils from reputed producers across Italy, from Liguria, Puglia, Tuscany, Umbria, Calabria and Sicily and a select range of antipasti such as olives, artichokes, sun-dried tomatoes, capers, gherkins and more to complement the oils. The Nut Roaster is a live station for panning, roasting, and caramelizing local and imported nuts. The Meat market stocks everything from cold cuts and varieties of eggs to include exotic meats such as whole peking duck prepped and cut in-store, Japanese quails, farm rabbits, and guinea fowl. ARQA offers spices sourced from their country of origin that are organic and stone-ground and the option to personalize blends and have them stone-ground. The Wine Cellar stocks globally renowned wines.

The Ground Level has The Bakery, the Juice Bar, the Farmer's Market and The Fresh Garden. Here, you can find the cultivation of Mumbai city's first Hydroponic Wall at The Fresh Garden at the Farmer's Market, which can improve and elevate the quality of salads and a market with the freshest produce of fruits and vegetables. Moving further, you could shop from a comprehensive list of fresh and artisanal breads from sourdough

to ciabatta and from a variety of healthy alternatives like quinoa bread and keto-friendly loaves made with alternative grains at The Bakery and have the healthy juices and smoothies curated by Sequel at The Juice Bar.

Level One has The House of Tea Salon, The Pantry, Freezer, YOKU MOKU and the La Folie Lab, the Coffee Roastery and the Coffee Lab and Xocolatl 57. It brings to you a one of its kind traditional British High Tea Ceremony with a menu of over 40 loose leaf teas to choose from and also a tea tailor experience where patrons create their own infusions at The House of Tea Salon. The Coffee Lab presents an opportunity to taste different variants while you roast top quality coffee beans. Craft your own chocolate bark at Xocolatl 57 which offers hand-picked range of pure and distinct, single origin chocolates scoured from the world's best producers from Ghana and Madagascar to Saint Dominique and Venezuela. Also savour delicious cookies and desserts from Japan's distinguished confectionary brand 'Yoku Moku' and India's 'La Folie'.

The Second Level consists of Foodhall's first platform for cooking enthusiasts – The Foodhall Cookery Studio and its first Italian restaurant called 'Sorrentina'. The Foodhall Cookery Studio is a one-of-its kind experiential kitchen that brings culinary experts together to offer interactive cooking classes and certification courses. Cooking aficionados can look forward to excel in courses that deliver on Baking, Wine Ambassador Certification Course, cuisine specific classes, Diet Cooking, Food Styling, Food Photography and so much more. A variety of pop-ups and Chef's tasting events will also be a part of it.

'Sorrentina by Foodhall', derived its name from Sorrento region is about all things Italy. 'Sorrento', a picturesque coastal town in the South

West of Italy is known for conventional Italian dishes. Sorrentino brings to the table modern Italian albeit rooted in tradition.

Avni Biyani, Concept Head, Foodhall, says, "It's our privilege to live in a world obsessed with and unified by food. Establishing in 2011 in Mumbai was our attempt at being part of the food dialogue that has become integral to contemporary culture. What started as a single, ingredients-driven store is now a store chain with branches in Bangalore and Delhi." With the new superstore, Foodhall aims to be India's answer to the likes of globally renowned stores in cities like London, LA and Dubai with only one main aim which is to make all its urban well-travelled patrons romanticize the idea and ingredients of a dish than just enjoy the final result.

Simon George is Cargill's President in India

Cargill has appointed Simon George as its President in India. George already leads Cargill's Starches, Sweeteners and Texturizers business in India. The appointment comes as Siraj Chaudhry, formerly Chairman and Country Representative for Cargill in India stepped down from his role, after being at the helm for 12 years. Chaudhry was associated with the company for the past 24 years and was instrumental in building the consumer and institutional food business for Cargill in India, working with customers and other external stakeholders that are critical to the company's operations and growth in India. Chaudhry will continue to be associated with Cargill as a senior advisor to the organization.



Simon George

New incumbent George has over three decades of experience in running various businesses in the food and beverage industry and has handled numerous senior level positions across regions. He has worked on developing business strategy, new markets, mergers and acquisitions, providing turnkey solutions and establishing business tie ups. He re-joined Cargill in late 2017 to lead Cargill's starches and sweeteners business. Earlier, he held a leadership position in Cargill's flavour business from 2007 to 2011. Speaking on his appointment as President, George, said, "I am honoured to take up this new role. I strongly believe in the India growth strategy set out by our global leadership. Working together with all our partners, I am sure Cargill will take an even more prominent position in the Indian market in the near future."

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Zebra Technologies study reveals that the number of “Intelligent” APAC Enterprise companies are 10 percent more than 2017

The research conducted by Zebra Technologies, over two months of time period, revealed that there was an increase in “Intelligent Enterprise” Companies. Companies that scored more than 75 points on the overall Index were defined as an “intelligent enterprise” which doubled to 10 percent in 2018. In Asia-Pacific, there was a spike in the number of companies that were rated as truly “intelligent” – moving up from 20 percent to 22 percent this year. The average Asia-Pacific score increased from 49 points in 2017 to 63 points in 2018, underscoring the rapid adoption of Internet of Things (IoT) solutions in the region. The Index measures to what extent companies today are meeting the criteria that define today Intelligent Enterprise. Overall, the Index reveals year-over-year growth of Internet of Things (IoT) deployment and investment, highlighting new momentum as enterprises expect less resistance to adoption and increasingly acknowledge IoT solutions as a core component for driving future growth across their organizations.

The online survey was conducted from Aug. 6 - Sept. 14, 2018 across different sectors, including healthcare, manufacturing, retail and transportation and logistics. In total, 918 IT decision makers from nine countries were interviewed, including the U.S., U.K./Great Britain, France, Germany, Mexico, Brazil, China, India, and Japan.

Eleven factors that determined a company as an Intelligent Enterprise were: IoT Vision, Business Engagement, Technology Solution Partner, Adoption Plan, Change Management Plan, Point of use Application, Security & Standards, Lifetime Plan, Architecture/Infrastructure, Data Plan and Intelligent Analysis. These

UNDERSTANDING OF AN INTELLIGENT ENTERPRISE

Intelligent Enterprise is based on technology solutions that integrate cloud computing, mobility, and the Internet of Things (IoT) to automatically “sense” information from enterprise assets. Operational data from these assets, including status, location, utilization, or preferences, is then “analyzed” to provide actionable insights which can then be mobilized to the right person at the right time, so they can be “acted” upon to drive better, more-timely decisions by users anywhere, at any time.

criteria were identified by executives, industry experts and policymakers from different industries at the 2016 Strategic Innovation Symposium, The Intelligent Enterprise was hosted by Zebra in collaboration with the Technology and Entrepreneurship Center at Harvard (TECH).

Key Findings were:

- IoT investments are boosting, and resistance to adoption is at a low.
- 91% expect that the numbers will increase in the coming years
- 48% are of the opinion that their IoT investments are going to increase by 11-20%.
- 69% have visionary approach for IoT and are executing IoT plans
- 32% of the respondents provide insights to the front-line workers of their companies. In Asia-Pacific, this stands at 41 percent and has increased by 7% from last year's index.
- 52 percent of respondents globally say information from their IoT solutions is shared with employees in real or near-real time.

Real-time analytics (66 percent) and security (63 percent) were reported as the most prevalent elements of a company's data management plan.

Security is a top priority across the enterprises. The Index revealed an 18 percentage increase in the number of companies that are constantly –monitoring their IoT security to ensure privacy and integrity. In Asia-Pacific, it has increased by 20% as compared to last year.

On the basis of data derived from the survey and the constant need of technology that adapts to IoT, Zebra has launched its new technology called Zebra Savanna. This technology platform aggregates and analyzes raw edge data from devices to deliver real-time insight. Integrates into current infrastructure, leveraging existing hardware, software systems of record and data ecosystems to create a holistic enterprise perspective, making businesses smarter and more profitable.

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Why investing in front-end store staff is the best brand marketing strategy

Brands tend to ignore the front-end retail staff and instead focus exclusively on investing in marketing not realizing that customer touch points are vital to marketing success.

By Udit Mittal

SOME PEOPLE MIGHT SEE MY EMPLOYEES AS A COST TO BE MANAGED BUT I SEE THEM AS POTENTIAL PASSIONATE BRAND AMBASSADORS.

— Richard Branson
Virgin Airlines



Retail operations include many aspects such as store design, display management, customer service, staff management and inventory optimization. All these combine to make a major part of the shopping experience but the key to a store's success depends on exemplary customer service.

The Indian retail industry is the fifth-largest retail destination globally and the fastest growing in the world. Today, as brands – both home-grown and global – vie with each other for a larger share of the customer wallet combined with the rise of e-commerce, the retail industry has its fair share of challenges. Today's increasingly disruptive environment has forced brands to stand up, relook their strategy and adapt to the changing times.

Successful retailers agree that the key to success in e-commerce or brick and mortar retail is to offer amazing customer service. In times to come, this aspect will become even more vital. In spite of this known paradigm, brands tend to ignore the front-end retail staff even as they invest heavily in brand marketing, not realizing that your customer touch points are vital to marketing success.

Retail operations include many aspects such as store design, display management, customer service, staff management and inventory optimization. All these combine to make a major part of the shopping experience but the key to a store's success depends on exemplary customer service. It helps stores increase their competitiveness and helps the little guys compete against the big guys and also withstand the pressures arising from growing online retail.

Here, it becomes imperative for brands to invest in talent. Companies tend to skimp on the front-end whilst investing in their middle and senior management on-boarding them at fat salaries but are reluctant to incentivise the front-end sales personnel. This is the biggest fallacy that proves to

be detrimental to a brand's health and they are then left staring in the face of stagnant or falling sales.

To hire the right talent and effectively train them on product knowledge, grooming, soft skills, and suggestive sales focusing on customer experience that befits the brand is the call of the day. The best employees demonstrate a sense of responsibility, drive and brand ownership. Build organizational connectivity by showing your employees that you care, mentor them with a future career growth plan and equip them with tangible and intangible tools on how to treat customers and deliver superior service.

A superior customer service is the key differentiator to online retail. Giving customers a reason to visit could become your advantage over e-commerce and it can be complemented by offering a seamless omni-channel experience that integrates convenience and personalization for customers.

Brands would do well to have clearly defined job descriptions, updated to reflect responsibilities, employee reviews and feedback that should be taken regularly. There must be communication transparency in evaluating performance, compensation, and sales incentives. No matter what the future turns out to be, customer experience at your store touch points will be the key to success and differentiation in a largely clustered online and offline retail environment. **PG**



The author is Founder and Managing Director, Unison International, one of India's top human resources consulting firms.

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Helping Shoppers With New Year's Resolutions

Retail dietitians can encourage consumers to make healthy-lifestyle modifications.

By Molly Hembree

Many resolutions are well intentioned but fall short on execution. As registered dietitians, we commonly see this struggle in our patients or customers, and find instead that small behavior changes are what lead to big results.

It's that time again: the exciting transition of embarking on the unknowns of a new year while one reflects on the accomplishments of the past 12 months. This milestone ignites hope in many people as they cast their gaze on future growth and progress. Beginning a new year cleans the slate and opens the door to opportunity for improvement across many aspects of our lives.

The grocery industry's ability to influence this momentous occasion is no exception. In a December 2016 survey conducted by Marist Poll, four of the top five New Year's resolutions that respondents made were related to health. These included losing weight (10 percent), exercising more (10 percent), improving health (7 percent) and eating healthier (7 percent). Further, as demonstrated by Food Marketing Institute's U.S. Grocery Shopper Trends 2017 survey, participants described their "primary food store" as a top ally (45 percent) in their quest for wellness and what "helps keep them healthy." As a wellness destination for customers, retail has a responsibility to offer potential products and services that align to customers' health goals.

Play it SMART

It may not come as a surprise, but many New Year's resolutions aren't kept (a staggering 88 percent are unsuccessful, as suggested by a 2015 ComRes/Bupa survey). Many resolutions are well intentioned but fall short on execution. As registered dietitians, we commonly see this struggle in our patients or customers, and find instead that small behavior changes are what lead to big results. A method called SMART goal-setting — an acronym for specific, measurable, attainable, realistic and timely — is one such method. Achievable health goals are positive and encouraging, and can start in grocery store aisles.

In an effort to support shoppers' newfound motivation heading into the new year, consider highlighting your retailer's connection to the fitness community. Gyms with large followings, such as YMCAs, woman-only fitness centers, Zumba



studios or CrossFit clubs, might be expanding their reach, particularly around January, and would be delighted to set up a table inside your store or offer shoppers a discount to check out their location(s). Now may also be the time to partner with upcoming events or fundraisers, such as local 5Ks, marathons or bike races, to market your store's good-for-you foods or perhaps donate perishable produce with some health messaging. Maybe there's even space inside your store to allow nearby businesses to conduct exercise classes like yoga or Pilates.

New Year's resolutions geared toward health can recruit help from both grocery and general merchandise. Action items in the aisles, such as 100-calorie snack displays, increased merchandising of low-calorie beverages, lower-sugar treats in bakery, healthy-recipe substitutions in the baking aisle, or better sales in produce, can win over health-conscious customers. GM products like cooking equipment and utensils, exercise gear, fitness devices, lunch bags, and reusable containers are tools that can boost shoppers' confidence in meeting their goals.

Your team of health experts, including pharmacists, physician assistants, nurse practitioners and/or dietitians, translate the science of health into consumer decision-making. Make it a priority not to miss the opportunity to walk alongside your customers in this journey, through in-store recipe demos, nutrition classes, weight management programs or guided health handouts. This can build trust with your shoppers that will last, regardless of whether their New Year's resolutions are achieved. **PG**

Molly Hembree, RD, LD, is a registered dietitian coordinator for The Little Clinic and Kroger.



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Marrying health and taste for today's health-conscious consumers

Gurugram's premium food and beverage importer Kalyan F&B Private Limited (KFBPL) aims to bring the finest, globally-appreciated products to India. The company is an exclusive importer of Thai brand 'be' that marries taste and health to entice not only health-conscious consumers but everyone. Progressive Grocer caught up with KFBPL's Founding Director Ashish Verma to know more about the brand and also discuss the evolving packaged food import scenario and market shifts in India.

By Namita Bhagat

Brief us on the background of your company. What made you foray into food import?

KFBPL was formed in 2016 with the vision to provide high-quality food and beverage products in the Indian market. Our company is the exclusive importer of a Thailand-based, health-oriented, F&B brand. Be offers a wide range of flavoured coconut water and coconut chips. My family members and I had the pleasure to experience this brand's products while visiting Vancouver, Canada and so I decided to import these products to India. Food import business presents a great scope owing to the fact that there is an increasing demand for quality food products among locals, presently. According to reports, the packaged coconut water segment in India was worth \$15.38 million in 2016 and is estimated to grow at a CAGR of over 17 percent (in value terms) during 2017-2022 to hit \$40.73 million by 2022, which offers an immense growth potential for us. Moreover, the shift of customers from soda drinks to healthy options is also proving an opportunity for business growth.

Tell us a bit about the brand 'be', its market positioning, pricing, and consumer profile.

In Thai Culture, coconuts have earned an essential place. Be Coconut Water started with this very fact as a foundation. Pure, natural and hydrating Be Coconut Water is currently sourced from a single estate farm in southern Thailand. The brand started out with two stories to tell, first, while conducting fieldwork in a small village in northeastern Thailand, around eight years ago— it was the first encounter to the nutritious and refreshing water of this tropical



palm. The relationship with the land and the people grew from a simple friendship to a strong commitment to the community and environment. Secondly, a local Thai manufacturing company already specializing in premium natural products whose aspiring momentum was the essence of being – 'Being pure, and Being well.'

'be' as a brand is young, healthy and denotes quality. The brand is catering to the learned and curious segment of consumers who are into healthy eating and want to be aware of everything that they are consuming. Its consumer profile primarily includes the individuals and families who are looking for healthy food and beverages, high-quality products and are interested in knowing what they are consuming. Quality-wise, all 'be' products imported to India are on the same benchmark as marketed in developed international markets like Canada,



the United States, Europe, etc. And they come in international level packaging such as cans, zip lock in chips pack, recyclable packs/cans.

Quality comes with a price and we try to offer the best price to the customers with our product range. Our pricing is competitive with all the other imported brands. We do not compare our pricing with the domestic brands as the rates of imported products keep on changing due to the nature of international trade.

Which all trade channels are you utilizing for retailing 'be' products in India?

The brand is available online as well as offline. We sell our products Amazon.in and BigBasket.com. We reach out to our consumers in-store through modern retail as well as traditional retail. Our offline retail partners include some of the popular modern retail chains like Modern Bazaar, Le Marche, Foodhall and Needs. Traditional retail hubs that cater our products would be New Delhi's Khan Market. Our current focus-markets include North Indian cities like Delhi-NCR and Chandigarh.

What can you say about the market competition from other local or foreign brands with similar offerings?

We consider only other imported brands as our competitors. It is very difficult for an imported brand to compete with a domestic brand. Competition is healthy as it leads to new product developments, raising the benchmark for quality and providing competitive pricing to the customers. Significantly, 'be' stands out from the its competitors with its attractive packaging – blue coconut water can and new product approach – Coconut Chips (a new and unheard snacking option for many), Coconut Water with Mango Splash, etc, along with a forever approach of providing healthy option to its consumers and patrons.

What is your understanding on new trends in snacks and beverage market in India?

People are shifting towards healthy snacking and drinking. We can see the shift from soda drinks to healthy drinks and fried snacks to baked snacks. Customers are more educated than they have ever been and want to know everything from production to manufacturing about the products that they are consuming. Imported food category is growing and trending in snacks and beverages segments.

How do you think the Indian consumer has evolved over the years in terms of food choices, especially the packaged treats?

Evolution has happened over the years, Indians traveling across the globe and international products available in the Indian market are the factors that



have led to changing choices in consumption patterns. It is a great amount of hard work, time and patience for an imported brand to win Indian palate. It is a difficult task to establish foreign brands in the Indian market because the tastes and flavors are completely different. However, with persistent efforts, anything and everything can be accomplished.

What is your view of the current packaged food import business scenario in India?

Some of the key reasons that are driving the growth of packaged food import in India include- high-quality foreign products, educated consumers and increased exposure to international brands. Import regulations have been improved and systemized over time. Indian food regulator FSSAI (The Food Safety and Standards Authority of India) also has made tremendous improvements in ensuring healthy and safe food products go into the market. Depreciation of Indian currency (Rupee) is making import costlier already and any hike in import duties will further lead to increase in prices for customers. There are also concerns about the trade deficit. Well, it's commerce after all. I think we must simultaneously raise the standards of the food industry in our country to produce high-quality products to export and to reduce import.

Do you plan to add more foreign brands and/or product categories?

Presently, we are focussing on increasing the SKUs of 'be' brand by introducing products like Dried Mango, Banana Chips and more and on enhancing our distribution reach. In the future, we will certainly look for options of adding more foreign brands to our product range to increase our SKUs and reach. We are only about a two-year-old company, testing waters and gathering market feedback on our products at this stage. **PG**



“We can see the shift from soda drinks to healthy drinks and fried snacks to baked snacks. Customers are more educated than they have ever been and want to know everything from production to manufacturing about the products that they are consuming.”

— Ashish Verma
Founding Director,
KFBPL

Cut down on foods high on sodium



The World Health Organization has recommended a daily intake of 5 gm of salt per day per person or 2400 mg of sodium per day per person. But Indians consume a total average of 10 gm of salt per day per person, which is twice the recommended WHO guideline on salt/sodium consumption.

By P. Rajan Mathews and Mini Thomas

Salt, or sodium chloride, provides one of the five basic tastes, and one that consumers love — saltiness and salt contributes both flavor and functionality in a wide range of applications. Not only does salt make foods taste salty, it also aids in food preservation and food safety, offers a variety of functionalities in a range of applications, and contributes other taste properties that are not easily replicated by other available ingredients. Sodium itself, is a very potent inhibitor of off-tastes, particularly the bitter tastes, and so, one of the reasons salt is added to so many different foods is because it helps reduce the off-tastes, the bitter tastes, and thereby enhances other tastes.

Researchers suspect there is at least one other mechanism that accounts for the sensory properties contributed by salt. Salt also improves mouth feel in foods by increasing the thickness and body of foods, and makes them taste richer. In meat products, it solubilises protein

and enhances hydration. In cheese, it helps regulate enzyme activity and also enhances texture. Salt/sodium is a vital part of the cheese making process, as it controls moisture, texture, taste, functionality and food safety. It controls the yeast activity in yeast-leavened breads and also strengthens gluten so as to make doughs more machinable. Salt exerts a preservative effect in foods because it lowers water activity. Although few foods today are preserved by salt alone, in some products, salt is one of the multiple ingredients used to reduce microbial activity in foods.

Sources of dietary sodium

In developed country diets, a large proportion of the sodium ingested is added (as sodium chloride) in food manufacture and foods eaten away from the home. James, Ralph & Sanchez-Castillo (1987) and Mattes & Donnelly (1991) estimated that for the United Kingdom and USA, about 75 per cent of sodium intake was from processed or restaurant foods, 10–12% was naturally occurring in foods and the remaining 10–15% was from the discretionary use of salt in home-cooking or at the table.

According to the Center for Disease Control and Prevention (CDC), Atlanta, USA, more than 40 per cent of sodium intake in USA comes from 10 food categories—breads and rolls; cold cuts and cured meats; pizza; fresh and processed poultry; soups; sandwiches such as cheeseburgers; cheese; pasta dishes; meat-mixed dishes such as meatloaf; and salty snacks like chips, pretzels and popcorn.



Statistic Canada's study revealed that the biggest culprit for high sodium intake in Canada is pizza, hamburgers and hotdogs, responsible for 19.1% of Canadians' total sodium intake. Other sources include soups, pasta and dairy products. Processed foods are responsible for 77 per cent of a person's total sodium intake, and so to meet those recommended sodium intake values, it is important that people with hypertension cut back on those high-risk foods.

Consumption of salt/ sodium in India

The World Health Organization has recommended a daily intake of 5 gm of salt per day per person or 2400 mg of sodium per day per person. This is the norm considered for the Indian population. Based on the study carried out by Mrs. Mini Thomas and Dr. E. Kannan, Associate Professor, Dept of Clinical Nutrition & Dietetics, PSG College of Arts & Science, Coimbatore, the overall consumption of salt or sodium among Indians in the Indian sub continent is as per the following:

- Salt used in home foods/ cooking and consumed through homemade foods is 8 gm per person per

Average Salt / Sodium consumption in India vs WHO Guidelines				
(Per Person per day)	Actual Consumption		WHO Guidelines	
	Salt (g)	Sodium (mg)	Salt (g)	Sodium (mg)
Salt used while Cooking	8.0	3680	4.00	1840
Processed Foods	1.1	500	0.55	253
Natural Foods	0.9	425	0.45	207
TOTAL	10.0	4605.0	5.00	2300

day or 3680 mg of sodium per day.

- Salt consumed through processed foods or restaurant foods is low in India as the processed foods industry is in its infancy stage and not fully developed. Neither have processed foods gained acceptance among Indian consumers. From the study, it is evident that families consume packaged foods as meal accompaniment or as evening snacks. Hence assuming that urban Indian consumers consume on an average of 100 gm of processed or baked foods, then the daily intake of

The World Health Organization has recommended a daily intake of 5 gm of salt per day per person or 2400 mg of sodium per day per person.

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sodium will be approximately 500 mg of sodium per person per day which is equivalent to 1.10 gm of salt per day per person.

- The last source of consumption of sodium is through the naturally occurring sodium in the foods. Indians consume leafy vegetables, vegetables, eggs and various forms of dairy products such as paneer, curd, cheese and milk, which contain the naturally occurring sodium. From the study, we can safely that Indian consumers consume approximately 400 to 450 mg of sodium from such foods, which is equivalent to 900 mg of salt.

Hence, from this study, it becomes evident that the Indian consumers consume a total average of 10 gm of salt per day per person, which is twice the recommended WHO guideline on salt / sodium consumption for human beings in India.



A national effort linked to reduction in sodium intake by 1200 mg/d should result in 60,000 to 120,000 fewer coronary heart disease events, 32,000 to 66,000 fewer strokes, 54,000 to 99,000 fewer myocardial infarctions, and 44,000 to 92,000 fewer deaths, and save 194,000 to 392,000 quality-adjusted life-years and \$10 to \$24 billion in healthcare costs annually.



Salt in Indian style of cooking

Indian cooking uses a lot of spices, tomato, tamarind, onion, etc, as the base for curries/ meals. As such the presence of salt in the cooking goes up. There has to be drastic changes in the cooking habits if the presence of salt is to be brought down. Acting on the following steps will help in the reduction of salt.

- Salt should be added as the last ingredient when cooking. The Indian habit of tasting the recipes in between cooking makes one add more salt. The food should be allowed to cook with the salt that is available naturally in these foods.
- While boiling vegetables, the residual water after boiling should be discarded as this water contains the residual salt.
- Indian cooking should move from boiling to steaming, to grilling or microwave cooking as this requires little salt.
- Replace salt with herbs and other seasoning wherever possible so as to mask the low salt taste.
- Usage of light salts (salts with lower sodium content should be used) should be encouraged.
- The taste of salt is felt when the food is rolled over the tongue while chewing. Hence, if salt is added last, then the sodium remains on the surface of the food and then the low salt cooking tastes normal. Except for the salty taste, the body adjusts easily to eating less salt. As the taste buds adjust, the desire for salty tastes will decline.
- Develop children's taste towards low salt foods and they should be taught to reject foods with high salt content.

India requires a national mission to reduce salt consumption

In the USA, as per the Center for Disease Control and Prevention (CDC), Atlanta, reducing sodium content by 25 per cent across the 10 major food categories with high sodium presence could reduce daily sodium intake by 11 per cent, or approximately 360 mg. This is significant, considering that a slash in daily sodium consumption of 400 mg has been projected to prevent 28,000 deaths annually, along with saving \$7 billion in health-care expenditure.

It is obvious that the projected benefits of sodium reduction are substantial. Several studies have estimated the societal benefits of sodium reduction to the population. In the most recent and comprehensive set of projections, the effects of 400 mg/d to 1200 mg/d reductions in sodium intake have been quantified with a variety of relevant outcomes. A national effort linked to reduction in sodium intake by 1200 mg/d should result in 60,000 to 120,000 fewer coronary heart disease

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Any meaningful strategy to reduce sodium intake population-wide must involve the efforts of food manufacturers, food processors, and restaurant industries, a strategy that is being successfully implemented in other countries.

events, 32,000 to 66,000 fewer strokes, 54,000 to 99,000 fewer myocardial infarctions, and 44,000 to 92,000 fewer deaths, and save 194,000 to 392,000 quality-adjusted life-years and \$10 to \$24 billion in healthcare costs annually.

Even if average sodium intake is reduced by just 400 mg/d, the benefits would still be substantial and warrants implementation of a national effort towards sodium reduction. Accomplishing population-wide sodium reduction is similar to achieving other lifestyle modifications, in that a substantial public health approach will be required to facilitate environmental changes that support changes in individual behavior. Indeed, the need for an effective public health approach is even greater for sodium reduction than other lifestyle modifications. For example, in contrast to cigarette smoking, where usage is evident and deliberate by the consumer, the sodium content of our diets is not readily apparent.

As the processed foods industry advances in India, upto more than 75 per cent of consumed sodium will come from processed foods. Even those who read labels are often left without realistic alternatives to high-sodium foods and, as eating out has increased, consumers are subjected to excessive sodium intakes from routinely served, processed foods. Some food items are extremely high in sodium. However, from a public health perspective, the problem of excess sodium intake largely reflects the cumulative intake of common foods that are only moderately high in sodium. Hence, any meaningful strategy to reduce sodium intake population-wide must involve the efforts of food manufacturers, food processors, and restaurant industries, a strategy that is being successfully implemented in other countries. For example, the United Kingdom has a vigorous salt reduction campaign, which has resulted in an estimated population-wide reduction in sodium intake of 10%.



Hence, for lowering the salt consumption in India, we need a national mission with a four-pronged approach (CRMR) to form the basis for a comprehensive policy:

- **Communication:** establishing and evaluating public awareness campaigns.
- **Reformulation:** setting progressive salt targets for reformulating existing processed food and engaging with the food industry in setting standards for new foods.
- **Monitoring:** surveying population salt intake, progress of reformulation, and effectiveness of communication.
- **Regulation:** engagement with industry, including regulation, to create a level playing field so as not to disadvantage more enlightened and progressive companies.

By acting on the above CRMR recommendations, a milestone in controlling hypertension across the country can be accomplished. It is high time that we accord priority to reducing the salt consumption and create awareness around it and its linkage with hypertension, a life-threatening disease that is assuming menacing proportions in India. **PG**



Mathews is a food industry professional specializing in brand & product management, market research, sales, advertising, sales promotion management, developing & implementing the strategy for the packaged food & beverage industry and converting food commodity products into successful brands.



Thomas is a clinical dietitian, a certified nutrigenomic counsellor and an active registered dietitian (RD) member of IDA.

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T THANUSHGARAN
Chairman, Kannan
Departmental Stores

Shri Kannan Departmental stores powers ahead with a customer-centric visionary approach

“Retailing is a tough and competitive business but we have been able to reap good profits,” says T. Thanushgaran, Chairman, Kannan Departmental Store, which operates 32 stores in Tamil Nadu spanning 7,67,452 sq. ft. of retailing area across convenience, supermarket, hypermarket and wholesale formats, apart from its warehouses and corporate offices. Progressive Grocer brings you the inside story of the company’s growth journey, its fastest-selling product categories, the new and emerging categories at its stores that has propelled the company into becoming a major retailing force in south India.



What is the customer proposition and marketing positioning of your store?

Over the years, we have been able to position ourselves as a reliable retailer to our customers. This has been accomplished because of the visionary approach taken by the company and its staff members to search, refine and filter the best of products and cater it to the customers at a reasonable price tag.

What are the retail formats under which Kannan stores operate?

We have 32 stores across convenience, supermarket, hypermarket and wholesale formats, which ranges from 3,500 sq.ft to 100,000 sq.ft.

What kind of people frequents your stores and what is the age group?

It is the middle class and upper middle-class shoppers who are the regular customers in our stores. We have not experienced a vast change in the customer profile. However, the customer segments have definitely evolved over the years. Customer segments are evolving based on the huge change in the consumption patterns by different demographics, their usage pattern, and the desired benefits they seek from the products.

Tell us about your product basket. Which are the categories and range of your merchandise you specialize in as a retailer?

Our product range has 37 major categories and 414 sub-categories and 1,04,000 SKU's in total. Our stores have a special segment for health care. We have further divided this category into sub-categories of nutrition and Ayurvedic. In the nutrition section, a lot of health supplements, sports nutrition, post gymming drinks, nuts, and seeds have been added. While in the Ayurvedic section, there are different companies that supply products which cures several common illnesses. We also have a brand named Regano which has products that include amla, as its main ingredient. Another brand, Ronrich, has products with nuts, nut mixes, dates, and honey as its main ingredients. Category management is an area for which we constantly research. The product mix that we have at our stores is a result of a series of market tests with new and old products. We interpret data and analyze it to gain insight into customer's needs and behavior. New and profitable categories are given more importance.

What is the location strategy for your stores?

Not only the location, but also the outlets, their designs, size, and the atmosphere of the place is crucial for a store's success. From our experience, we have seen that certain layouts where the customers had to walk each floor, couldn't work, despite the locations of the stores.

Give us an overview of how much space you have allocated to the different sections and what is your strategy for reallocating space for different sections at your store?

Today, each category is getting more refined and is further expanding into sub-categories. The store and the staff need to be updated from time to time. And a constant check on them is required to give the best of experience and ease to our customers. More

space is allocated to product and categories that are growing at a faster rate. Reallocation of space to products and their repositioning is a constant process at the store for better business propagation.

Broadly speaking, what is the sales contribution from your major product categories?

A major share of business comes from the grocery. Grocery accounts for 68% of the sales, fresh vegetables and fruits make 8% of the sale, 3.2% of sales by the food court, 2.4% by medicines and the remaining by home utility products.

What is the sales velocity in your stores (sales per square foot)?

We organize several events and programmes, in collaboration with top brands as well as with the upcoming brands, in the stores. We do kiosk set up in each store for the most valuable products for our stores. We often do markdowns for monthly purchase and seasonal purchase. To brand the product of our choice, we use all our resources, including billing and delivery vehicle. The size of our stores depends on the potential of that particular area. We have stores with a surface area of 3,500 sq. ft. as well as 1,00,000 sq. ft. also. So each store's sales velocity varies and also the average sales per square foot.

Which are your top-selling PLs in food?

Adarshana is the top-selling product in the food segment. Millets are the primary ingredient in all the products by adarshana. It constitutes of 1.23% of the total sales. It has been doing really well because of the shift in eating habits of our customers. And there is a constant demand for traditional food and healthy products. Another brand, haute break which is into freshly baked



After understanding the areas of consumption and its patterns, we decide on the size and format and the product mix that the store will provide. It is a very serious exercise that we practice at our stores.





Our product range encapsulates 37 major categories and 414 subcategories and 1,04,000 SKU's in total. Our store has a special segment of health care.

snacks, is growing in demand. We are planning to expand the category into dry cakes, muffins, and other bakery products.

What is your pricing strategy for private labels?

Initially, we price them competitively to increase the retail pick of private label products. We promote the differences in price. Our team continuously tracks and checks the quality of the products to ensure that the quality is always on par with the national brands.

What are you doing to promote your private labels?

We do a lot of in-store branding and activities that attract customers. We also create awareness for our products in the near vicinity of our stores as a brand-building activity.

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

The overall share of our house brands comes to 17.9% whereas food and grocery sales account for 13.8% of the overall sales. A sizeable share of our private label sales comes from snacks, ready to cook & eat categories, apart from pulses & cereals

What kind of margins your private labels offer when compared to national brands?

Obviously, the margins are much better in our private labels. The reason for such margins is decreased marketing expenses and operational cost for our private labels. We also pass on retail insights

to manufacturers to bring out their best competitive products in terms of both prices and value which would delight a customer.

What is the sales split between your private labels and national brands?

National brands still occupy a majority of the share in several categories, but the trend is changing for good. People are trying out our private labels because we transfer our credibility to those products as well. And then, there are the advantages of better prices and value.

What is the sales turnover of your private labels?

The growth has been consistent in private labels and altogether they contribute 17.9% of the total sales.

How do you ensure that suppliers stick to quality standards and efficiency norms?

When selecting a supplier, we run serious background checks on their track record. We, then pick the most efficient and promising ones out of them. We ensure supply of quality products at a competitive price. Our team also works with suppliers to bring down the cost of products. For certain categories, our team even sources the raw materials to bring down the operational cost.

Which are those elements that have become the hallmark of your stores?

The one thing that makes our store different from others has to be the cost-effective pricing of products at our stores. We offer discounts, not



KANNAN DEPARTMENTAL STORES: FACT SHEET

Retailer/ Brand Name: Shri Kannan Departmental Stores (founded on 15 September 1999)

Brand Name: Kannan Store

Parent Company: Sangeetha Shopping Centres (1985)

Retail format of the store: Regional Retail

Stores in operation: 32

Average size of stores: 20,000 sq. ft.

Total Retail space in operation: 7,67,452 sq. ft. (retail stores, warehouses, and corporate offices)

Store operating model: 2 stores owned and 30 leased

SKU Count: 1,04,000 SKUs (including medicines)

Average footfall: 1800 customers (approx.)/daily

Average Bill size: Rs. 1200

Average sales per sq. ft.: Rs. 850 per sq. ft.



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Customer segments today are evolving based on the huge change in the consumption patterns by different demographics, their usage pattern, and the desired benefits they seek from the products.



only on the bigger size of products but also on the smaller packets as well. So the customer gets the ease of purchase at our stores. Another factor is the vast product range that we offer to our customers. Even the smallest of categories are addressed and are made available in the stores. We also offer the convenience of one-stop shopping to our customers. From grocery and everyday goods to sports and entertainment, we offer a product mix that every customer requires at a discounted price. We have our own bakery division and packaging division through which we maintain the quality and hygiene protocol. Our pharmaceuticals offer an 16% discount on transactions. Our farm-fresh fruits and vegetable division is also a marked differentiator for steadfastly offering lesser than the market prices on various products.

Which are the new and emerging categories at your stores and what do you make of their market potential?

Demand for food products that are locally grown and sourced, is increasing. For example, products like natural sugars, cold pressed oils, and ready to cook foods that are millet based are in demand. People these days are more into fitness and healthy living. Increasing awareness of healthy living has definitely played a crucial role in boosting the demand for such products. Similarly, beauty and skin

care have a lot of smaller sub-categories now. And there is a tremendous growth in this sector.

Are there any interesting concepts or innovations you have introduced at your stores? Please give details.

Presently, we are focusing on mechanizing our production and distribution area. This is with the motive of bringing down the operational cost and improving the overall efficiency of our stores. We are also planning to open traditional food stores. It will operate as a small format with an area of about 1,000-2,500 sq. ft. We are thinking of franchising options to expand our brand name in this format.

How do you ensure that suppliers stick to quality standards and efficiency norms?

With the manufacturers, we have decided our product's consistency and settled at a particular quality, texture, smell, color, and taste. Thus, it is easier for us to check the quality because we have a standard to measure it. For a product that we manufacture, each batch goes through quality check for it to get into the dispatch area.

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

Kannan will soon be launching its App. The App comes with an easy-to-operate model with the option of a regional language too. We are also bringing in more brands in each category. The App has features that allow customers to get an in-depth knowledge of products and they can go through the app's information section before buying those products.

As a retailer, what have been your valuable learnings and experience?

Over the years, we have learned that product allotment, in each category, for each shop should vary. For example, most customers don't want twenty brands of packaged foods. They really want experts to narrow it down to the best two brands. Each variety offering distinct flavors and characteristics. If there is a wide variety to choose from that is also a mood spoiler for a customer. After understanding the areas of consumption and its patterns, we decide on the size and format and the product mix that the store will provide. It is a very serious exercise that we practice at our stores. In fact, we have even removed furniture and textiles in a few stores to reformat the store's size.

Tell us about your future plans for the brand.

Our future plan is to make our brand reach Pan India. **PG**





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A sweet business, full of beans

India's love for all things sweet is expected to push the demand for chocolate products even higher in the coming years. With the increasing health awareness levels among consumers, the confectionery sector is expected to witness a growing demand for functional chocolates that are high in nutritional value. Health consciousness has certainly caught the attention of manufacturers as a result of which the market is seeing cereal bars being introduced, which are currently amongst the fastest growing category in the Indian confectionery market, even while toffees, candies, caramels and nougat continue to record faster growth.

By Sanjay Kumar



The Indian confectionery market, in comparison to other developed markets, is in the initial phase of growth and evolving fast. However, the confectionery market in India is also one of the fastest growing in the world with a strong double-digit annual CAGR. Research from global market intelligence agency Mintel reveals that India is one of the world's fastest growing chocolate confectionery markets. Sales of chocolate confectionery in retail markets grew by 13% between 2015 and 2016 in India, followed by Poland which saw sales growth of 2%. In comparison to the rest of the world, Poland and India were the only two markets to see sales of chocolate grow in 2016, with sales in the United States (US), United Kingdom (UK), Germany and France flat over this period, while sales fell in Russia (-2%), Brazil (-6%), and China (-6%). The younger generation in the country, who are well traveled and look for newer formats and flavors in the confectionery segment, has led to an increase in demand. As per Nielsen India, the confectionery market in India is valued at \$1.5 billion, growing at a two-year CAGR of 9%. Experts at the Canadian Intelligence Center say that India's confectionery market was worth close to \$1.3 billion in 2013, and it's expected to reach \$2.2 billion by 2018.

The confectionery market in India is divided into three main segments: a) Chocolates b) sugar candies and c) gums. The chocolate segment has a growth rate of about 20% followed by gums at 9% and candies at 5%. The market share for chocolates is 46%, sugar candies 34% and gum 20%. Mondelez India Foods continued to lead



dominated by global giants Mondelez and Nestlé, which sell local favorites such as Cadbury Dairy Milk and Munch, respectively. The secret to their success: inexpensive chocolate products priced as low as Rs. 5 for a bar to appeal to value-conscious consumers. According to Mintel, the most popular chocolates in India are those sold in Rs. 5 and Rs. 10 packages.

Sugar confectionery, such as boiled sweets, mints and toffees, caramels and nougat, enjoy a 5% retail value CAGR at constant 2017 prices and expected to reach INR 120 billion in 2022. Today, they are also being used in monetary transactions as substitutes for lower denominations of currency in many places. This has contributed to the growth in sales of sugar confectionery in India. Retail outlets have started to issue sugar confectionery priced at Rs. 1.00-5.00 during transactions, in lieu of loose change for example, to cover for the dearth of lower denominations of currency.

Parle Products was the leading manufacturer in sugar confectionery in 2017 with a 13% share of retail value sales. Strong brand penetration, lower price points and consumer loyalty for its brands contributed

The younger generation in the country, who are well travelled and look for newer formats and flavors in the confectionery segment, has led to an increase in demand. As per Nielsen India, the confectionery market in India is valued at \$1.5 billion, growing at a two-year CAGR of 9%.

chocolate confectionery with a 55% share of retail value sales in 2017. The company's position owed much to its constant product innovation, a well-established distribution network and a range of SKUs. According to market researcher Euromonitor, chocolate confectionery is projected to see a 4% retail value CAGR at constant 2017 prices and expected to reach INR 148 billion in 2022. A rising penetration rate, including among rural consumers and a growing fondness for chocolate as a healthy snack option are expected to stimulate sales. The introduction of new flavors and innovation by chocolate manufacturers is also helping drive increased sales of chocolate confectionery across the country.

Segments and size

India's love for all things sweet is expected to push the demand for chocolate products even higher in the coming years. Mintel forecasts that the country's chocolate market will hit Rs. 32,000 crore by 2020, up over 160% from Rs. 12,000 crore in 2015, making it one of the world's fastest-growing. Fortunately, this comes at a time when global cocoa supplies from key growers such as the Ivory Coast and Ghana have recovered after months of concern that demand would outstrip supply. Celebrity endorsements, appealing packaging and storage compartments for chocolates by companies like Mondelez India Foods and Ferrero India are among the marketing and promotional activities that remain primary drivers of sales growth in chocolate confectionery in India.

The popularity of chocolate in India is also linked to its affordability. The chocolate market is

Distribution of Sugar Confectionery by Format: % Value 2008-2013						
% retail value rsp	2008	2009	2010	2011	2012	2013
Store-Based Retailing	100.0	100.0	100.0	100.0	100.0	100.0
Grocery Retailers	95.1	95.1	95.0	95.0	95.1	95.0
Modern Grocery Retailers	5.6	5.6	5.8	6.2	6.5	6.5
Convenience Stores	0.4	0.4	0.4	0.4	0.4	0.4
Discounters	-	-	-	-	-	-
Forecourt Retailers	0.2	0.3	0.3	0.3	0.3	0.3
Hypermarkets	1.9	2.6	2.9	3.2	3.5	3.5
Supermarkets	3.1	2.4	2.2	2.3	2.3	2.3
Traditional Grocery Retailers	89.5	89.5	89.2	88.8	88.6	88.5
Food/drink/tobacco specialists	3.5	3.5	3.6	3.6	3.6	3.6
Independent Small Grocers	79.7	80.0	80.1	79.9	79.8	79.7
Other Grocery Retailers	6.3	6.0	5.5	5.3	5.3	5.2
Non-Grocery Retailers	4.9	4.9	5.0	5.0	4.9	5.0
Health and Beauty Retailers	4.5	4.5	4.7	4.7	4.7	4.6
Mixed Retailers	-	-	-	-	-	-
Other Non-Grocery Retailers	0.4	0.4	0.3	0.3	0.2	0.4
Non-Store Retailing	-	-	-	-	-	0.0
Vending	-	-	-	-	-	0.0
Homeshipping	-	-	-	-	-	0.0
Internet Retailing	-	-	-	-	-	0.0
Direct Selling	-	-	-	-	-	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Chocolate confectionery is projected to see a 4% retail value CAGR at constant 2017 prices and expected to reach INR148 billion in 2022. A rising penetration rate, including among rural consumers and a growing fondness for chocolate as a healthy snack option are expected to stimulate sales.

to the company's top position. The chocolate market in India operates primarily on price and the most popular chocolate products are priced at Rs. 5 and Rs. 10. According to Mintel, since companies are unable to increase prices to account for inflation and cost increases, typically pack sizes and aspect ratios are adjusted every 12-18 months to give them a higher realization per tonne of product sold. Boiled sweets and toffees, caramels and nougat remain popular among consumers of all ages, which will drive the demand for sugar confectionery, going ahead.

Gum in India is expected to see a 5% retail value CAGR at constant 2017 prices to reach INR 59 billion in 2022. The growing working population, the rise in the number of new smokers and the demand for quick solutions to tackle bad breath are set to support sales. Perfetti Van Melle India remains the leading player in gum with a 23% share of retail value sales in 2017. The company led chewing gum with Center Fresh and bubble gum with Center Fruit. Promotional activities and good product penetration underpinned the player's frontline position.

Gum sales continue to be driven by impulse purchases. The ever-growing trend of new young consumers chewing gum, either at leisure, after a meal or smoking or during long working days, have pushed sales. Spearmint, peppermint and other flavors, which help to mask bad odors and provide a refreshing taste and long-lasting flavor were the most popular with consumers. Manufacturers, including Wrigley India, are focused on providing pocket-friendly packs for these consumers.

Candy is a rich sweet confection made with sugar and often flavored or combined with fruits or nuts. Rapid modernization, continuously rising innovative and premium product launches, growing e-commerce market coupled with expanding organized retail channels and synchronized distribution networks are projected to drive the candy market in India in the coming years. Major cities in India, such as Delhi/NCR, Mumbai, Hyderabad, Bengaluru, Chandigarh, Chennai, and Kolkata are among the leading demand generators of candies in the country. With increasing economic development in the country, lifestyle and preference

→ INNOVATIVE CONFECTIONERY PRODUCTS THAT SHOWCASE TRENDS

Highlighting consumer commitment to sweet treats, manufacturers continue to innovate around a number of flavors, both sweet and savory, and consumers are increasingly curious enough to give even the most outrageous flavors a try. Here's a selection of 10 key trends seen in the global chocolate confectionery industry, including innovations around flavor and form, as well as explorations into ways to extend sharing opportunities.

Beyond orange. Manufacturers are increasingly experimenting with other types of citrus in chocolate. Indeed, the number of chocolate products flavored with lemon has doubled over the past year globally. And beyond simply lemon, we are seeing more elaborate variations – products with lemon, yogurt and pepper, or with lemon oil. For example, in Germany, Gepa The Fair Trade Company launched a white organic yogurt chocolate bar with lemon zest and pepper.

Dessert as an ingredient. Chocolate used to be an ingredient in desserts,



Marcia Mogelonsky

but now desserts have become an "ingredient" in chocolate confectionery. From crème brûlée to crepes and tiramisu – and a whole other range of desserts – desserts are becoming flavors. Beyond baked desserts, we are also seeing things like milkshake and ice cream flavored chocolate being launched. The German company Kaoka, for example, launched an organic dark chocolate with buttery crispy crêpes.

Vegetables in chocolate. Although

still niche, we have seen new chocolate launches in Asia (especially in China) containing vegetables. One of the vegetable-chocolate combos we have seen are chocolate covered potato chips, which could be considered more of a salty snack plus chocolate (similarly, we have seen other salty snacks transitioning to chocolate, e.g. chocolate covered pretzels and popcorn). The other Asian-inspired vegetable-based chocolate we have seen is edamame covered with chocolate – seemingly the next step after wasabi flavored chocolate, which has become a big trend. In Japan, Mujirushi Ryohin launched Mujirushi Ryohin Purple Sweet Potato Chocolate, with white chocolate and purple potato paste.

Unusual fruits. We have already seen a wide range of fruit – including strawberry, raspberry and cherry – added to chocolate, but there are now a lot more types of fruit being integrated. Peach is one of the fruits that have become more common, as seen in Poland with Luximo Premium, which launched



of consumers is also significantly changing in Tier I and Tier II cities, which is driving candy consumption across these cities. Moreover, demand for sugar-free and low calorie candy products is also growing on account of increasing health awareness among consumers across the country.

According to “India Candy Market By Type, By Organized versus Unorganized, Competition Forecast and Opportunities, 2011-2021”, the candy market in India is anticipated to grow at a CAGR of over 9% during 2016-2021, on account of rising middle class households, coupled with increasing working as well as youth population. The most

dominant segment in the country’s candy market is sugar candy. The sugar candy segment is expected to maintain its dominance due to the continuing launch of innovative products as well as aggressive branding initiatives undertaken by leading market players. Preference for premium chocolate candies as gifts on festivals and functions is also growing considerably across the country due to increasing marketing initiatives to position chocolate candies as a product of indulgence rather than an impulse product. In 2015, the organized sector accounted for a majority share in India’s candy market; and the segment’s dominance is expected to further increase during 2016 - 2021.

Candy and gums are available in about 5 million outlets as compared to chocolate, which reaches about 1.7 million outlets. Confectionery penetration in urban market stands at 75% whereas its presence in the rural market is about 10-15%. The rural market penetration of sugar candy is about 15% as compared to chocolates, which has about 2% penetration. Brand and product quality are the main preference drivers for the urban population whereas

While domestic consumption in India is currently low if compared with other more mature markets, such as Germany at 8 kg per head, or the United Kingdom and France at 6 kg respectively, there is huge potential for the Indian chocolate market to grow even further.

Luximo Premium Praliny Nadziewane o Smaku Brzoskwiowym (Chocolates with Peach Flavoured Filling).

Going nuts. Hazelnut is the top nut ingredient in chocolate, followed by almond and peanut. But there is also a growth in pistachio, which has figured in more products this year, and there are a number of blends of nuts and seeds or nuts and other ingredients. For example, in Canada Rogers’ Chocolates launched Rogers’ Chocolates Natural Dark Chocolate Chipotle Almonds, which comprises fresh California almonds cooked in small batches of cane sugar and a blend of chillies and spices.

Not just for breakfast. Cereals moving into chocolate. Certain cereals have been included within chocolate for a while, but we are now seeing other types of cereals moving in – such as granola and muesli – that give the chocolate more texture. Other grains moving into chocolate include quinoa, as seen in the Agave Quinoa Sesame in Milk Chocolate bar from US company Seattle Chocolate.

A greater variety of “fine” and “rare” cocoa. We are used to seeing artisan and “sourced” solid chocolate from a number of countries (such as Sao Tome and

Venezuela), but we are now noticing this trend even more, suggesting a growing interest in fine and carefully crafted products. There is also considerable interest in ascribing a “taste profile” to the chocolate, much like we see in the wine industry. For example, in Vietnam, chocolate brand Marou launched Marou Ba Ria 76% So Co La Den (Ba Ria 76% Dark Chocolate), featuring a bold and fruity chocolate made from Trinitario cocoa, which is sourced directly from family-owned farms in Ba Ria province.

Florals. While floral notes in chocolate products are still occasional, this is an avenue that has the potential to be explored more. For example, American Wild Ophelia has launched Wild Ophelia All Natural Southern Hibiscus Peach Milk Chocolate Bar containing 41% cacao with Angelus peaches, which are said to be high in potassium and vitamins and offer healthy protein and dietary fibre.

White chocolate. We are seeing an increasing number of white chocolate launches on the market, with a lot of different and innovative fillings and flavorings. One example of this is Gepa The Fair Trade Company Weiße Bio-Jogurt-Schokolade mit Mango und Kokos



(White Yogurt Chocolate with Mango & Coconut) in Germany.

Building and layering flavors. Recent quirky and interesting new product launches have included beer and chocolate (as seen in the Netherlands with Voor Jou! Real Belgian Chocolate Glasses of Beer), red wine and marzipan (as seen in Germany with MK Mark Chocolate with Red Wine Marzipan), smoked BBQ potato chips (as seen in Wild Ophelia Smokehouse BBQ Potato Chips Dark Chocolate Bar) and other fun products that demonstrate the extent to which chocolate serves as a great base for building and layering flavors.

Marcia Mogelonsky is the Director of Insight, Mintel Food & Drink, at Mintel. Her expertise focuses on a number of areas in confectionery and snacks.



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In addition to leading the aisle with confectionery, grocery retailers should anchor the ends of the section with premium chocolate and gum/mints.

— **Kunaal Kumar**
 Owner, Modern Bazaar stores in Delhi-NCR

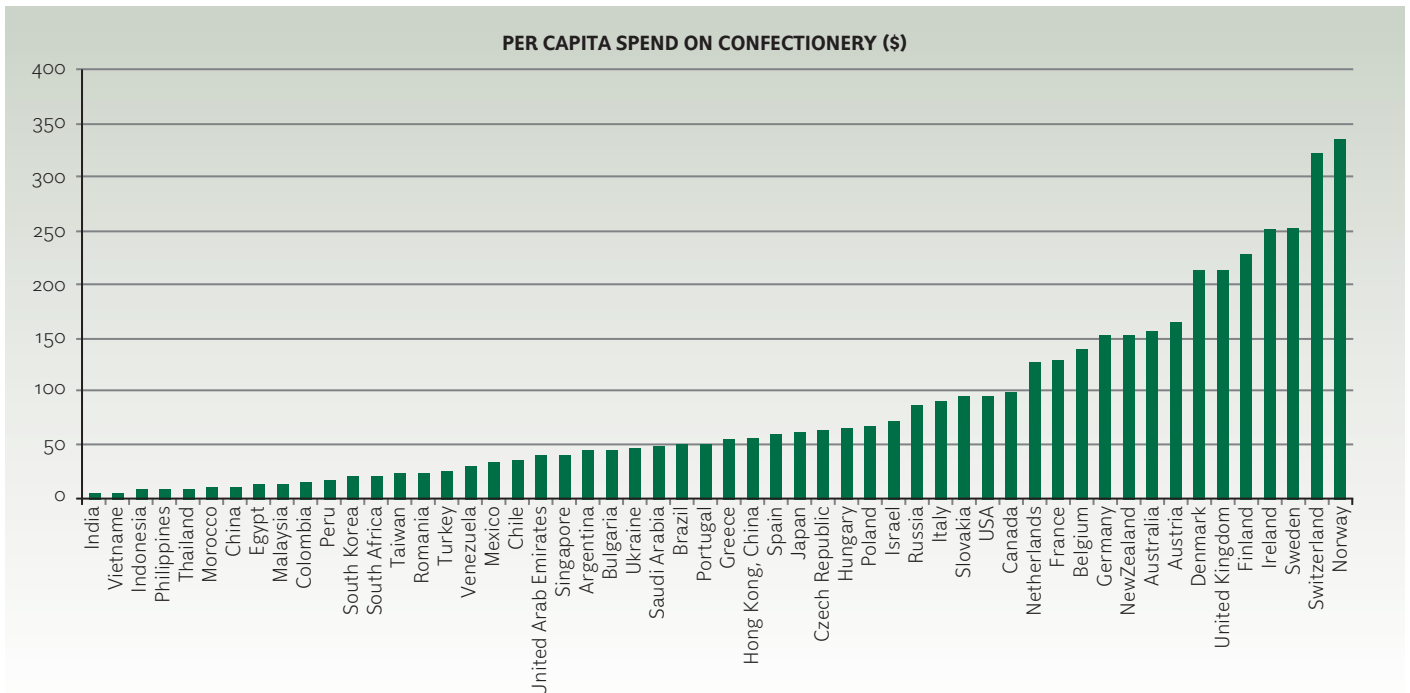
price is the priority buying consideration for the rural population.

As per market estimates, the distribution of confectionery products across Modern Trade channels is about 15% whereas General Trade accounts for nearly 70% of distribution. In terms of consumption of confectionery, the western states of India are the leaders with a 32% consumption share followed by northern states at 28%, south India at 23% and eastern India at 17%.

In India, sugar candy is majorly an impulse purchase whereas it is mostly a planned purchase for chocolates. The north region of India constitutes the largest share in the candy market followed by the west region. According to a report by Research and Markets, metros such as Delhi/ NCR, Mumbai, Hyderabad, Bengaluru, Chandigarh, Chennai and Kolkata are amongst the leading demand generators of candies in the country, while Tier II cities have also been contributing significantly. What is worth noting is that today, most candy segments target not just children, but youngsters as well. To expand their horizons, many manufacturers have moved beyond advertising in children’s books and traditional mediums to electronic and digital.

According to Canadean’s data, sugar confectionery and gum will outsell chocolate in volume. Gum is expected to increase by 64 per cent in volume consumption by this year, compared to

41 per cent growth in chocolate. In terms of value, however, chocolate is still on top and by some market estimates expected to surpass the \$1 billion mark in 2018. That’s in part because chocolate continues to be a favorite among children. While gum is popular with adults, kids still love sweets and toffees, keeping them high in demand. Kids aged nine years and younger are responsible for almost a quarter of sugar confectionery and chocolate consumption. Consumers in this age group, like in any other country, have a preference for sweet tasting products, which will be further enhanced as they develop their tastes and preferences for certain brands and products. So despite the growing interest in gum, chocolate will remain a staple in India’s confectionery market.



Source: SG Cross Asset Research/Equity, Euromonitor

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Since brands do not spend on promoting candies, toffees and chocolates, as it is not viable for them, this segment remains inactive and lacks attention in comparison to other categories. Of course, their display at the check-outs helps, but a lot of time they are overlooked when people don't want to scan the section near billing counters.

— Mohit Arora
Director, Kipps Mart

Data from Mintel also reveals that India's chocolate confectionery market has had a strong CAGR (compound annual growth rate) of 19.9%, in retail market value, between 2011 and 2015, and is expected to grow at a CAGR of 20.6% from 2016 to 2020. The study reveals that value growth clocked by the Rs. 15,600 crore industry in 2017 was 12.4%. In 2016, the growth level was the same at 12.4%, but higher as compared to 9.7% in 2015. In volumes, however, from a high growth rate of 16.6% in 2014, the category witnessed a de-growth of 1.5% in 2015. It returned to a double digit growth of 12.3% in 2017, from 4.8% in 2016.

When it comes to chocolate confectionery consumption (volume sales), it seems India is a nation of chocolate lovers. Mintel research reveals that India consumed 228 thousand tonnes worth of chocolate in 2016. Other markets that consumed in excess of 200,000 tonnes of chocolate in 2016 include France (251 thousand tonnes), Brazil (236 thousand tonnes), and China (202 thousand tonnes). Meanwhile, Australia and Indonesia consumed 95 thousand tonnes and 94 thousand tonnes worth of chocolate in 2016 (respectively). The US and the UK, on the other hand, consumed 1.3 million tonnes and 555 thousand tonnes of chocolate (respectively). The report also talks about India's per capita chocolate consumption at about 100 gm, with urban centres comprising 35% of the chocolate consumption in the country.



Marcia Mogelonsky, Director of Insight, Mintel Food and Drink, says: "Our research indicates that consumers in India believe chocolate to be beneficial and convenient – seemingly the key reasons behind the growth of the country's chocolate confectionery market both in value and volume." On the benefits of chocolates, Mintel research reveals over two in five Indian consumers (44%) find sweet or sugary snacks like chocolates and cakes to be healthy, while over one in three (35%) Indians believe these snacks provide them with energy. Meanwhile, as many as



DARK CHOCOLATE GAINING GROUND ON MILK CHOCOLATE

When it comes to consumers' chocolate preferences, milk chocolate is the heavy favorite, but dark chocolate just might be gaining ground. According to the latest research from Mintel, just more than half (51 percent) of all adult consumers say their favorite type of plain chocolate is milk chocolate, followed by 35 percent who favor dark chocolate and 8 percent who prefer white chocolate. In contrast, Mintel's report found that 57 percent of consumers favored milk chocolate and 33 percent preferred the dark variety. The progressively better understood health benefits of dark chocolate may be increasing its popularity as more consumers are looking for indulgent foods that can serve multiple functions such as nutrition or convenience. An exception to the pattern of milk chocolate being the consumer favorite is among consumers aged 55+ who are more likely to favor dark chocolate, most likely because they are seeking added nutritional benefits.

Some 46 percent of men and 48 percent of women age 55+ favor dark chocolate, followed by 38 percent of men and 40 percent of women that prefer milk. These numbers are indicative of the trend toward the increasing favor for dark chocolate, as 73 of all chocolate consumers are aware that dark chocolate is healthier. As the economy continues to grow and expand, consumer demand for the affordable indulgence that chocolate provides is expected to remain and interest in chocolate as part of the larger food culture will continue. However, obesity, the dark cloud that looms over this category and many other indulgent categories, and related health risks will remain a concern for many consumers and present challenges to increasing category sales.

When deciding to purchase chocolate, some 89 percent of consumers buy chocolate as a treat or reward and 87 percent buy it as a snack option. Meanwhile, 83 percent of consumers look carefully at the size of chocolate candy packages to determine the best value for the money, and 72 percent buy chocolate as a way to improve their mood or provide an energy boost.

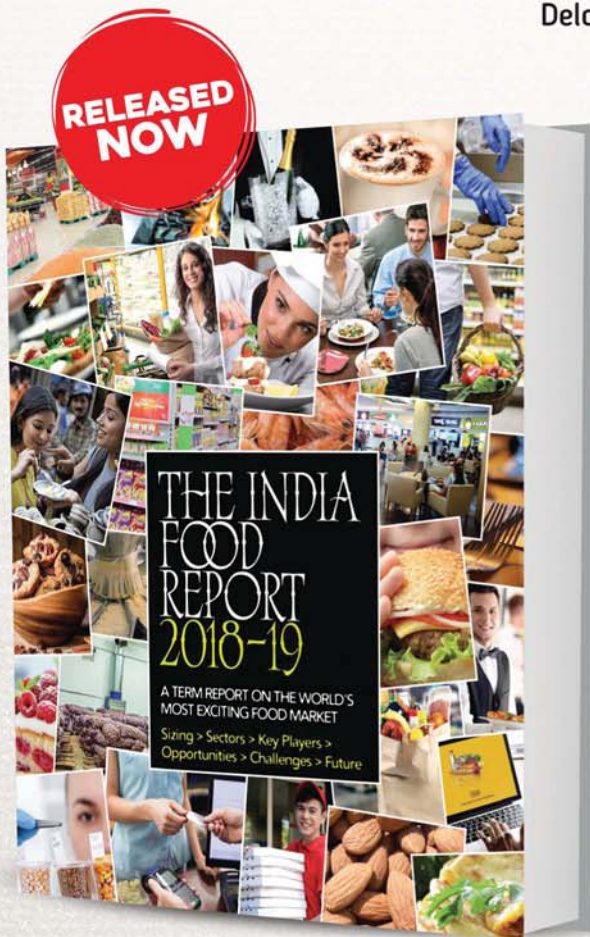
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one in two (49%) Indian consumers associate sweet or sugary snacks like chocolates with convenience.

Data from Mintel also reveals 43% of Indians consume sweet or sugary snacks like chocolate and cake between lunch and dinner, with over half (53%) of Indian consumers reporting that they tend to snack in between meals because they get hungry. However, per capita consumption of chocolate in India is still very low as compared to many countries in the West, which means there's lot more room to grow. While domestic consumption in India is currently low if compared with other more mature markets, such as Germany at 8 kg per head, or the United Kingdom and France at 6 kg respectively, there is huge potential for the Indian chocolate market to grow even further.

According to "India Chocolate Market Forecast & Opportunities, 2018", the per capita consumption of chocolates is increasing in the country, which will continue to pull market revenues. The report says that India's chocolate industry will grow at CAGR 23% by volume between the years 2013 and 2018 and reach 3,41,609 tonnes. The dark chocolates are expected to account for larger market share when compared to milk and white chocolates in



The confectionery segment has been witnessing new product launches and is an important section for any retailer as it targets children, adults, young and old, but I feel that the category requires more visibility and a stronger positioning.

— Amit Lohani
MD, Max Foods



the coming years. The introduction of medicinal and organic ingredients in the manufacturing of chocolates has led to a new trend and development in the country, which will be adopted by major manufacturers to remain active in the market. Mintel research shows that consumer demand is likely to be the major impetus for more conversion to organic offerings. In India, as many as 19% of Indian consumers would like to see a wider variety of natural snacks that have no additives or preservatives, for instance.

Making confectionery punch its weight in grocery channel

Supermarkets remain a sweet spot for confectionery, but with consumers shopping on so many channels, it's vital that grocery retailers not only retain, but also grow, their confectionery share. So, what are the drivers of category growth? Frequent new product introductions, premium offerings, shareables with recloseable pouches, line extensions and cross-branding, seasonal execution, and "experience," specifically in the realms of product texture and flavor. Confections are highly impulse-driven in the grocery channel, with 66 per cent of brand decisions made in the store.

So how can manufacturers capture shoppers' attention? Indian consumers look for the most fun and enjoyable products. This means manufacturers need to innovate with new and novel shapes, textures, flavors and packs. Industry leaders offer three keys to success: innovation, promotions and merchandising. As consumers look for new items that bring excitement into the category, manufacturers too look at numerous factors in developing new flavors and brand extensions, from industry trends and research to consumer preferences.

For example, consumers love the flavor fusion of sweet and savory, and manufacturers are creating more delicious options and new treats. "Our research shows that seasonal chocolate tops all chocolate new product development, a testament to the popularity of seasonal treats among consumers across the

Sales of Sugar Confectionery by Category: Volume 2013-2018

'000 tonnes	2013	2014	2015	2016	2017	2018*
Boiled Sweets	27.0	29.0	31.0	32.8	34.5	35.9
Liquorice	-	-	-	-	-	-
Lollipops	4.1	4.2	4.2	4.2	4.3	4.3
Medicated Confectionery	11.0	11.7	12.3	12.8	13.3	13.8
Mints	16.8	17.3	17.8	18.2	18.7	19.2
Power Mints	7.3	7.2	7.1	6.9	6.8	6.7
Standard Mints	9.5	10.1	10.7	11.3	11.9	12.5
Pastilles, Gums, Jellies and Chews	7.7	8.1	8.4	8.7	9.0	9.2
Toffees, Caramels and Nougat	145.3	164.4	185.3	207.8	231.9	256.7
Other Sugar Confectionery	-	-	-	-	-	-
Sugar Confectionery	211.9	234.6	258.9	284.6	311.7	339.1

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources. *forecast.

globe. This reflects the fact that these products are typically bought to help celebrate holidays or special occasions. With this in mind, seasonal chocolate is somewhat immune to recessionary pressures as these products are bought on an occasional basis. Given the fact that chocolate lovers have a heart, interest in ethical products remains relatively strong, with 17% of new products claiming some sort of “ethical-human” positioning, which could include fair trade, Rainforest Alliance, or some other independent bean-to-bar certification,” says Mintel’s Mogelonsky.

The past couple of years have seen a spate of product innovations, value-additions and new launches in the Indian confectionery market. According to industry experts, as young consumers look for newer formats and flavors in confectionery, manufacturers are induced to cash in on the demand and expand their product range. Take, for instance, Parle Products, which has kept innovation at the core of conceptualizing and manufacturing products. The company has created and manufactured iconic confectionery brands such as Kismi and Melody. A majority of confectionery brands, including Parle, are dominated by the Rs. 1 price point. With flavor and pricing being the most important factors in the category, companies have tried to capture audiences and play by their own rules.

Over the past few years, many have observed an increase in purchase of the wholesale confectionery bags priced at Rs. 50 and Rs. 100, which is a trend that is likely to continue. Similarly, all products of Ferrero are so differentiated, be it Nutella, Kinder Joy or Rocher. Ferrero’s remarkable growth can also be attributed to an innovative distribution strategy; Tic Tac is now retailed through stationery shops in addition to kirana stores, while Ferrero Rocher’s network has also included neighbourhood grocery shops.

In addition to product innovation, shopper marketing programs that leverage national promotions are key enablers that help drive incremental confectionery sales and leading manufacturers should look at creating consumer programs that allow retailers to leverage such promotional events. Consumer programs help drive volume on retailers’ category sales, and it creates an exciting and engaging shopping experience.

As far as merchandising is concerned, manufacturers need to work with retail partners to ensure that the brands are on display in prominent areas. At the same time, manufacturers can help retailers leverage their proprietary in-aisle best practices to improve traffic down the aisle, sales, flow, segment space allocation, in-stock conditions



Sales of Sugar Confectionery by Category: Value 2013-2018

Rs million	2013	2014	2015	2016	2017	2018*
Boiled Sweets	4,404.9	4,672.1	4,894.8	5,058.6	5,212.6	5,328.2
Liquorice	-	-	-	-	-	-
Lollipops	1,078.8	1,068.4	1,047.2	1,024.1	1,005.7	990.4
Medicated Confectionery	4,730.9	4,866.8	4,927.7	4,967.1	5,024.0	5,074.5
Mints	3,777.5	3,872.0	3,981.5	4,120.5	4,268.1	4,437.7
Power Mints	1,642.5	1,575.3	1,511.7	1,458.6	1,409.1	1,365.9
Standard Mints	2,135.0	2,296.7	2,469.8	2,661.9	2,859.0	3,071.8
Pastilles, Gums, Jellies and Chews	1,788.7	1,886.9	1,976.7	2,064.5	2,140.5	2,221.6
Toffees, Caramels and Nougat	31,359.5	35,092.6	38,892.0	42,953.8	47,479.4	52,392.1
Other Sugar Confectionery	-	-	-	-	-	-
Sugar Confectionery	47,140.4	51,458.8	55,720.0	60,188.6	65,130.3	70,444.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources. *forecast.

and assortment. Being an impulse purchase category, creating many points of interruption throughout a shopping trip will allow consumers to see and buy their favorite chocolate snacks.

Strategically placing confections at the end of an aisle will also drive aisle traffic and leverage the expandable, impulse nature of the category. In fact, when comparing the indexed total confectionery velocity, there’s an average eight point difference between leading the aisle with confectionery and leading with another category, says a study.

“In addition to leading the aisle with confectionery, grocery retailers should anchor the ends of the section with premium chocolate and gum/mints,” says Kunaal Kumar, Owner, Modern Bazaar stores in Delhi-NCR. “Almost 60 per cent of the products stocked in our store are imported products. The categories that are really working are chocolates, breakfast cereals and sauces, like pasta sauces. Products from the US and Europe like pasta





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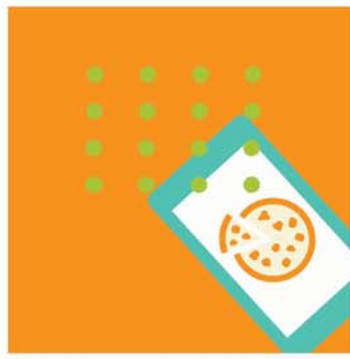
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and pasta sauces, chocolates, etc, are extremely popular with the consumers,” he says.

“Since brands do not spend on promoting candies, toffees and chocolates, as it is not viable for them, this segment remains inactive and lacks attention in comparison to other categories. Of course, their display at the check-outs helps, but a lot of time they are overlooked when people don’t want to scan the section near billing counters. Also, not all the brands can get prominent display, so the ones kept at the back or on the last shelf, lose visibility,” opines Mohit Arora, Director, Kipps Mart, the hugely popular grocery store in Ludhiana.



Pure retailing is the lifeline of confectionery products so confectionery manufacturers need to have a very good team and distribution network.

Chocolate consumption is constantly increasing in India and consumers are demanding differentiation. Higher priced chocolates are particularly in demand as the growing Indian middle and upper class are developing a taste for luxury goods. Hence, most of the big players in the chocolate market are constantly aiming at offering premium variants. The Indian chocolate confectionery market has room for anyone who offers innovative products, making it one of the fastest growing markets, with average growth of 24% from 2010 to 2014 in value terms. Moreover, according to Mintel Market Sizes, the market is forecasted to grow at a compounded annual growth rate of 25% till 2019. This opens up opportunities for new companies to venture into this category and also for existing players to expand their current portfolio in premium space.

The home-made chocolates category has also registered high growth in the past few years, largely driven by occasion-specific gifting. These are distributed both from the makers’ homes and confectionery shops as well as through wholesale and retail shops. Nature’s Basket offers customizable

food and gourmet gift hampers, which are occasion specific and customizable. Foodhall, a Future Group company, has similar product offerings. Haldiram’s, a traditional mithai store, realizing the opportunity in other food gift categories, now offers innovative products and hampers in chocolate, gourmet, and bakery space. It therefore comes as no surprise that the concept of gifting chocolates during festive occasions and even at other times, instead of gifting traditional sweets, is catching on fast.

The confectionery market in India has a well entrenched presence of multinational players such as Mondelez (formerly Cadbury India), Nestle,



Perfetti Van Melle, Mars India, Sprüngli Ag and Lotte as well as large domestic players such as Amul, Parle, ITC, Ravalgon and Candico. Multinational companies such as Ferrero, Hersheys and Lindt have a strong presence in the premium chocolate market. In the chocolate confectionery segment, Cadbury holds the largest market share followed by Nestle.

Retailing opportunity in confectionery

Pure retailing is the lifeline of confectionery products so confectionery manufacturers need to have a very good team and distribution network even at a district’s sub-divisional level so as to increase their product’s reach to consumers even in rural areas. Manufacturers looking to corner the largest share of the retail market are opening up on their offerings and making the products available to a wider audience largely through catering products for all segments and thus reaching out to the mass market but retaining their main focus on the retail market and doing business through a structured distribution channel. For example, Ferrero is

present in both general retail trade and modern trade stores. Though the metros are key markets for Ferrero products, the brand is also present in B and C class cities and has been seeing its penetration in the market increase year on year. There is also great potential for further growth of the chocolate category across the untapped rural market.

For mass market retailers like Reliance, More, Heritage, Nilgiris, Big Bazaar, etc, Cadbury Silk and Nestle Smooth collections are part of their regular offerings. The affordable segment has seen considerable activity in the past couple of years with the entry of new players such as Schmittens and



LuvIt brands. Both these players have made the category a lot more vibrant with their packaging and young celebrity endorsements and are a welcome entrant to the chocolate category. They boast of a variety of chocolates and are a welcome addition for a retailer and they compete for palate and flavor experience with the more established Cadbury Silk and Nestle Extra smooth offerings.

The premium segment (Rs. 150-400) is a very important segment for premium/gourmet retailers like Godrej Nature's Basket, Foodhall, HyperCITY, and premium mom and pop stores catering to the mid-upper customer segment of the market. This price segment of chocolates contributes maximum sales for high-end retailers. The segment was cluttered at one point in the past with various imported chocolate brands. Lindt, the Swiss chocolate brand, was a leader in this segment but they no more operate in the Indian market.

In the luxury segment, there is a genuine dearth of choice. Most chocolate brands like Royce, Leonidas or Patchi sell via their own stores and are priced over Rs. 500. But they are true delights for

customers who like to indulge in luxury chocolates or gift them. Some of these chocolates might not be positioned as luxury in their home countries but the import route adds a lot of costs and hence the higher prices, which make them seem like luxury chocolates.

While retailers can believe that supply will drive demand, they have to be prepared to invest in the following activities to promote chocolates: • Offer gifting solutions via a gifting counter, which enables quick gift wrapping of a specific number of bars with personalization options • High-quality boxes and wrapping paper should be made available • Ready-made and made-to-order gift basket options should be displayed • A cold chain that ensures last-mile delivery of chocolates is essential • The chocolate category in a store should be in a prime location

Retailers also need to aggressively communicate/engage with their customers via various channels in advance about the gifting options available for the festive season. Education on fine chocolate options available and associated health benefits is the need of the hour. Retailers should organize a chocolate-tasting workshop for loyal customers in advance based on their previous purchase patterns. This would give chocolate aficionados the required exposure early on as to the availability of chocolates.

Retailers should organize a chocolate-tasting workshop for loyal customers in advance based on their previous purchase patterns.





Confectionery manufacturers must therefore position their products as a healthy offering rather than just a gourmet treat, in order to cater to a wider consumer base.

As they say, the proof of eating is in the pudding. Retailers also need to be aware that chocolatiers depend on the festive season for almost 70 per cent of their business and are always going to be under-stocked during the season. Artisanal chocolatiers will have capacity constraints. Hence it makes good sense to collaborate in advance with brands to ensure a profitable season. The thing to remember is that chocolates can be a very impulsive purchase. Hence retailers should allocate the required space at impulse purchase locations within the store. Consumers, on the other hand, need to be cognizant of the fact that fine chocolates need to be treated with care and should be transported in a temperature-controlled environment to avoid temperature and humidity shocks. What's the use of buying the best fine chocolates and not enjoying it to the maximum?

Opportunity for 'healthy' products abounds in confectionery

Rising disposable incomes and increasing health awareness across the Asia-Pacific region are driving the demand for functional confectionery products, meaning manufacturers should promote the healthy aspects of their products to succeed, UK-based firm GlobalData says. The research firm's report, "Opportunities in the Asia-Pacific Confectionery Sector," reveals the market, which was valued at \$39.2 billion in 2017, is expected to swell at a compound annual growth rate

(CAGR) of 5.6 per cent between 2017 and 2022.

"The growing popularity of natural ingredients, which are free from artificial flavors and preservatives, in food is boosting the demand for confectionery products," says Debakshi Sarkar, GlobalData consumer analyst. "In addition, the sizeable proportion of young consumers with adventurous palates is fueling the growth for novel varieties of confectionery products in the region." Within the Asia-Pacific region, China held the largest value share with 42 per cent, followed by Japan (25.5 per cent), India (10.1 per cent) and Australia (7.1 per cent) in 2017. India is expected to experience the fastest growth with a CAGR of 10.3 per cent, followed by China with 6.7 per cent during the review period.

In terms of categories, sugar confectionery accounted for the largest share with 43.3 per cent, followed by chocolate (37.7 per cent) during the same year. Demand for these categories is driven by consumers seeking a gourmet treat after a busy day, as evidenced by GlobalData's 2018 Q3 consumer survey. It found that 58 per cent consumers in the Asia and Australasia region consume chocolate/sugar confectionery while relaxing at home. The top three companies in the Asia-Pacific confectionery sector accounted for 36.5 per cent value share in 2017.

Mars, Inc. led with 14.4 per cent, followed by Mondelez International at 12.8 per cent and Lotte Co. at 9.3 per cent.

Private label products accounted for 2.5 per cent share during the same year.

"With the increasing health awareness levels among consumers, the confectionery sector is expected to witness a growing demand for functional chocolates that are high in nutritional value," Sarkar said. Health consciousness has certainly caught the attention of

manufacturers, as a result of which, the market is seeing cereal bars being introduced, which are currently amongst the fastest growing category in the Indian confectionery market, even while toffees, candies, caramels and nougat continued to record the fastest growth.

Confectionery manufacturers must therefore position their products as a healthy offering rather than just a gourmet treat, in order to cater to a wider consumer base. At the same time, chocolate



innovation is increasingly being influenced by a wider variety of other food and drink categories, among them salty snacks, biscuits, and sugar and gum. This means that mainstream brands should be looking to experiment with premium markers such as cocoa content and provenance, as the mass market catches up with high-end producers.

More high-end premium concepts, such as single-origin and heirloom chocolate products, are still in their infancy, but could have significant potential in a market where consumers are looking for upscale options. Consumers are also looking for chocolates with additional ingredients. Brands can take an indulgent route by adding biscuits, cake and confectionery, or a better-for-you approach with fruit, seeds and grains.

The add-ins most valued by consumers are, however, more established ingredients such as nuts, suggesting that manufacturers may have more success by continuing to innovate in this area, with a focus on unusual varieties and provenance. Nostalgic flavors, simplified ingredients, transparent sourcing and sustainability practices are all things consumers are requesting, and confectionery companies are taking into account these considerations moving forward.

Challenges

Chocolate consumption in India has seen an incredible growth rate in the past few years, especially in urban and semi-urban areas. Until a few years ago, chocolate confectionery was considered a premium in comparison to sugar and gum confectionery, but major players in the market have found channels to manufacture and distribute their products at more affordable prices than before. This has given the Indian consumer an array of choice whilst giving manufacturers a level game field to compete, especially in the premium and affordable premium segments. Local companies are much smaller in volumes and operate at more regional levels.

The chocolate confectionery industry has been quick to respond to this untapped market opportunity. Looking at new product launches in India, premiumization as a claim has seen a 100% growth over last few years. Also seasonal launches have proved to be particularly dynamic across the market. Consumers are trading up to luxury and premium chocolate, which has given an opportunity to



international brands to increase their penetration by creating an affordable premium space for the aspirers. Many Indian consumers consider chocolate assortment boxes to be premium and to be more hygienic and longer-lasting than traditional Indian sweets. This mindset has contributed to increased sales as the popularity of seasonal gifting of chocolate, particularly during Diwali, has grown in recent years.

However, all is not as sweet as it appears. The chocolate confectionery market in India is facing challenges, such as keeping costs low for mass markets and health issues. The key challenges that the chocolate market is facing in India are inflationary pressures on raw material prices, lack of government initiative, high entry barriers due to duopolistic market and price-sensitive consumer. Rising sugar and cocoa prices are putting pressure on companies to innovate with ingredients and packaging to offer better prices for the mass market.

Manufacturers and retailers are working on finding the right balance between rising costs and shrinking margins on the one hand, and affordability and meeting the needs of the value-seeking consumer on the other. Competition also plays a role. There has been above-average

growth of the value channels in recent years. Under the circumstances, offering a variety of pack sizes, both small and large shareable packs, is a great way to address various value needs as well as health-and-wellness solutions.

Moreover, as the chocolate confectionery category suffers from being associated with negative health,



Consumers are trading up to luxury and premium chocolate, which has given an opportunity to international brands to increase their penetration by creating an affordable premium space for the aspirers.

brands are working to manage this perception and introduce elements of enhanced health messaging. Indeed, according to Mintel's research, new product development with antioxidant, low/no/reduced transfat, low/no/reduced calorie and diabetic claims are all posting remarkable growth in recent years, suggesting that the prospects for market growth in these segments are very positive. Amit Lohani, MD, Max Foods, says, "Consumers are so health-conscious today that they seek health and wellbeing in everything they consume, including confectionery. Now they are demanding sugar-free



contribution from modern retail stores is also expected to rise.

Growth of the category is also expected to rise in the days ahead. Players who invest in expanding their distribution network and make innovative launches will emerge stronger and gain a bigger market share. The per capita consumption should continue to increase for the category on the back of relevant innovations. The entry of multinational companies in the Indian confectionery space has not only increased competition, but also the per-capita consumption, by launching new products at affordable prices, and creating awareness among buyers through advertisements and promotional campaigns.

The emerging trend of gifting confectionery products is also driving the category, and there is great potential for further growth in the untapped rural market. Till 10 years ago, people believed in gifting traditional Indian sweets or mithais, but now the younger generation believes in gifting chocolates and confectionery products due to their longer shelf life, easy to store and handle properties, and also because of healthy options available.

Over the years, festive packs of confectionery products have become quite popular among consumers with many shifting from mithai to chocolates and other confectionery gift hampers. Going forward, we might see a shift within the category, with higher price points becoming more prevalent within the segment. Developments like new packaging formats being introduced in the segment apart from more innovative products are also anticipated.

Over the years, festive packs of confectionery products have become quite popular among consumers with many shifting from mithai to chocolates and other confectionery gift hampers.

candies and chocolates. The confectionery segment has been witnessing new product launches and is an important section for any retailer as it targets children, adults, young and old, but I feel that the category requires more visibility and a stronger positioning."

Way Forward

With the growth of supermarkets and hypermarkets in Tier II cities, sales of sugar confectionery through modern retail is set to further increase, going ahead. As adult consumers' demand for premium chocolates continues to grow, manufacturers of premium chocolates are expanding their brand presence in premium stores such as Brown Tree and other modern stores in urban areas to tap this segment of consumers. As the market evolves, the revenue

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

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Feast of candies

→ **Company profile:** House of Candy was started in 2012 by Samkan Products Pvt. Ltd. It has a unique concept of pick and mix at the candy store which is fairly new to the Indian confectionery market. All sweets and candies sold at House of Candy outlets are imported from Europe and USA and are of the best quality. These candies are available in different colors and flavors to suit all palates. We have a range of candies from tangy to sour, chocolate covered candies and fudges to licorice sweets and the most popular marshmallows, gummies and jellies.

Concept of store: House of Candy is a pop-up-store format, present in 65 malls all over India and has recently opened stores in five new malls, as well. House of Candy follows the 'pick and mix' concept. It also has a store-in-store kind of approach and is present in most of Hamley's stores in malls across the country.

Market and consumer segment: With the Indian confectionery market size at Rs. 18,000 crore currently and growing at 20% per annum, House of Candy is well positioned to be a part of the market and harvest its gains. The company is clocking a growth rate of 50% per annum.

Best-selling products: The best-selling products at its stores include gummy



bears, cola bottles, fizzy peaches, raspberries, sour strawberry bites and fizzy jelly snakes.

Product portfolio: The products have a vast range and variety. The product range includes cherry pop, chocolate vanilla pop, tutty fruity pop, strawberry pop, green apple pop, golden stripe strawberry pop, unicorn pop, candy necklace, apple belts, choco flavored beans, strawberry cream, giant apple cables, fizzy mix, rainbow bites, jelly mix, sour apples, juicy lips, fizzy jelly snakes, magic fruits, fizzy cherry cola, fizzy mini strawberry pencils, chocolate fudge, giant strawberry



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Brand footprint: Select City Walk Mall (Saket, Delhi), Hamley's, Phoenix Mall (Mumbai), Hamley's, Express Avenue Mall (Chennai), DLF Mall (Saket, Delhi), Epicuria Mall (Nehru Place, Delhi), DT City Centre Mall (Gurgaon), Pacific Mall (Dehradun), Walkway Mall (Haldwani), Forum Vijaya Mall (Chennai), Phoenix Whitefield (Bengaluru), Hamley's, Ambience Mall (VasantKunj, Delhi), MBD Mall (Ludhiana), Mall of India (Delhi), Pacific Mall (Delhi), Z Square Mall (Kanpur), Phoenix Mall (Pune), Forum Sujana Mall (Hyderabad), Pavilion Mall (Ludhiana), Inorbit Mall (Hyderabad), Sugarsize Factory (Shillong), Phoenix (Kurla), Hamley's DLF Mall (Saket, New Delhi), Inorbit Mall (Mumbai), Phoenix Market City Mall (Pune), Phoenix Market City Mall (Whitefield, Bengaluru) PVP Mall (Vijaywada), Celebration Mall (Udaipur), and many more.

“



Currently, all our products are imported. When our volumes grow more, we will start looking at manufacturing them in India. The key element of our retailing strategy is to open as many counters as possible across the country. House of Candy will maximize the number of POSs (Point of Sales) all over India. To grow this category, even more, industry players should continue to invest in this business.

– Sameer Bhatia
Managing Director, House of Candy

Roadmap ahead: House of Candy is currently present in over 65 malls across the nation, in Tier I, II and III cities. The brand's aim is to be present within a range of three km of their customers. The potential for growth is unlimited in the market. Also, the brand is keen on expanding its presence at a faster pace.



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Coining the mark in confectionery

→ **Company profile:** Pee Pee Group started in 1909 and is an ISO 9001 certified company. It is a diversified trading and manufacturing company that started out as a distributor of electronics and home appliances, and also manufactures home and kitchen appliances. Seven years ago, its food division started manufacturing a variety of cocoa-based premium chocolates, which was branded “Jumbo” and “Nature N Nature.”

Product portfolio: The portfolio covers coin chocolates, bar chocolates, choco-nutty, choco crispers, choco dates, nutty dates, osmo dehydrated fruits, and real fruit squashes. All the chocolate products manufactured by the company are 100% pure vegetarian. The product range consists of a mix of nuts and chocolates. Some products have nuts and dates stuffed inside chocolates.

Market reach: The major markets for the brand are all FMCG outlets like hypermarkets, supermarkets, grocery retailers, departmental stores, etc. The

company caters to people of all age groups and the major focus is on teens and kids. The products are available with some modern trade outlets across the country. The brand has a presence in the south Indian market as of now and is trying to expand to more Indian cities and towns. The company is also working at the export segment.

New products in the offing: Different flavors in coin chocolates with exclusive varieties and a range of sizes are in the pipeline. It is also planning to launch premium luxury dark chocolates with high cocoa content.

Best sellers: Coin chocolates are the brand’s best sellers. Currently, the brand makes 10 million coins monthly and it has a target of producing 25 million coins monthly, going ahead.

Use of technology: From manufacturing to packaging, everything is automated. There is hardly any manual work. So there is a lesser chance of manufacturing

“



The company believes that modern trade retail is one of the most important market segments for branded confectionery players.

– Goutam Kumar Jain
Managing Director, Pee Pee Appliances

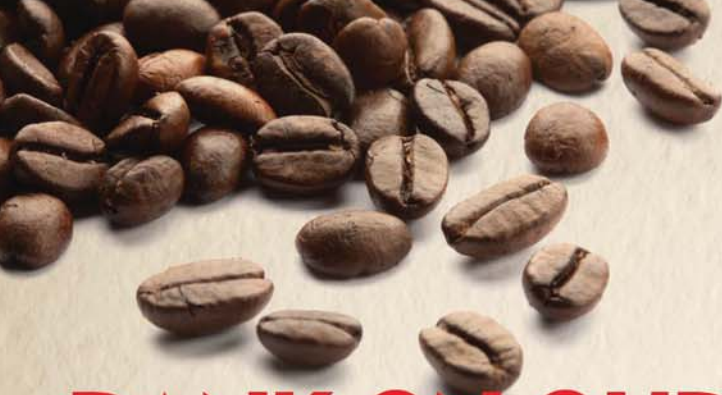
unhygienic products. All the food products are tested and certified by the concerned authorities. The manufacturing unit is ISO 22000 certified.

The brand is into developing innovative products as per the latest changing trends. For example, there is a trend towards consumption of dark chocolates among the youngsters. So it is planning more varieties in that segment.

Marketing strategy: Customers believe in the brand and its quality. The company supplies chocolates in gift boxes with different counts in different sizes of reusable quality boxes, which are liked by the customers. The brand’s treat packs and varieties for premium nutty chocolates and choco crispers are popular among the customers. This is because of their innovative and attractive packaging.

Roadmap ahead: The company believes that modern trade retail is one of the most important market segments for branded confectionery players. The brand’s future goal is to be present with all modern trade outlets across the country. There is a plan to introduce new SKUs in premium chocolate varieties for modern trade. Acquiring a major presence for the brand in all retail sectors is the goal going ahead.





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Conquering with wafers

➔ **Company profile:** Dukess is a major player in the confectionery market. The brand has plants in Hyderabad. Two decades ago, the company started out as a manufacturing unit. It became a supplier of chocolates in Telangana. The brand is today a household name in the country. The products of the brand are manufactured under the banner of Ravi Foods Pvt. Ltd.

Market reach: The brand is into modern trade business, general trade, CSD canteens, and institutional sales. Dukess has always focused on the production of its entire product range with international quality standards and its products have a presence in 50 countries globally.

Product range: The company has products like wafers, biscuits, chocolates, and other confectionery. The brand has introduced another variety in the wafers category with a butter and cheese flavor.

Key markets and customer segments: The Indian market is one of the fastest growing chocolate and confectionery markets in the world. The increasing purchasing power of the middle class and upper-class population has transformed the market, remarkably.

“



Undoubtedly, the chocolates, biscuits and confectionery industry has changed significantly. Chocolates are a convenient mid-day-meal today whereas they were considered a luxury earlier.

— Arvind Sharma
Business Head, Ravi Foods



The focus has shifted to premium categories now. Assorted offerings have become a tradition and are ruling the roost in supermarkets/hypermarkets. The growing online retail serves as an exciting opportunity to expand the market size. Better internet connectivity has developed in the past few years and online retail has become a convenience for customers. They now have the option of sitting in any corner of the world and browsing from an ocean of choices with some exciting discounts to avail.

Category and market forecast: The fast growing categories in the market are assorted chocolates and confectionery and healthy products. The purchasing power of consumers is changing and rising. Hence, there is a major shift in their preferences. Undoubtedly, chocolates, biscuits and confectionery industry has changed significantly over the years. Earlier, confectionery and chocolates were a luxury. However, it has now become a convenient mid-day-meal solution. With more focus on healthy products, consumers are on the lookout for natural and healthy ingredients in their confectionery products. Product differentiation is a need of the market. Catering to the needs of consumers is not enough; great offers and discounts is another important facet of marketing.

Consumer connect initiatives: Dukess has focused on the continuous growth of the

company and innovation in products. The brand is always pushing for some path-breaking ideas that have the potential to revolutionize the market. Good-for-health offerings, focus on social media strategies to engage with consumers and being omnipresent are some of the key areas for brand's consumer connect initiatives.

Merchandising strategy: Knowing your consumer and finding the target group is the basic and most important merchandising strategy for the brand. The merchandising strategy includes focusing on the existing product line. However, the brand is also focusing on catering to the changing demands of the consumers and introducing more innovative and market trendy products.

Challenges: Keeping up with the demands of the consumers and maintaining the quality of a vast product range is the biggest challenge for any brand, including Dukess.

Roadmap ahead: A wide range of products, different flavors, increasing the visibility of the brand and going digital are the focus areas. Expanding overseas is the immediate goal of the brand. The brand's focus is also on natural ingredients and flavors to cater to the needs of consumers. The demand patterns have drastically changed when it comes to consumers needs and Dukess is in sync with the changing market demands.

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Bringing choices from across the globe for customers

→ **Brand profile:** Kravour Foods is based out of Ahmedabad and the brand caters to the masses among whom the demand for foreign confectionery is also growing. Kravour Foods imports sparkling juices and drinks from Belgium, dip sticks from Malaysia and confectionery from Germany. It manufactures a range of confectionery and biscuit wafers at its plant in Ahmedabad.

Market and consumer segments: For its imported confectionery, it counts Modern Trade as its primary sales channel whereas general trade outlets are its distribution platform for biscuit wafers. Wafer biscuits manufactured by the company in India has a big market in traditional retail stores. The company feels that there is a strong demand for good quality products and as the income level of people rise, they are more disposed to buying foreign brands without worrying about its cost. For instance, there is now an increasing demand for products like Lindt chocolates from Belgium and other such imported confectionery, which people get a chance to savor during their foreign visits.

Market size: The confectionery and chocolate market is growing at a faster rate than any other segment of the food industry. The market is growing at a rate of 12% to 15% per annum.

Segment growth and category innovation: Sugar Boiled confectionery is the fastest growing segment in the chocolate and confectionery market. Better distribution network along with mass reach is acting as a strong drivers of the market growth. Innovative products and some unique new flavours are also driving sales growth. The company wants to continuously launch newer variants in every category with the help of OEM partners of the brand.

Market opportunity: Growing incomes, exposure and travel and the quest for better quality products are some factors



There is a gap in the market when it comes to the reach of confectionery products. Reaching prospective customers is a hurdle for new age brands as the market is already dominated by some big international players. It is hard to get acknowledged among such brands and to compete with them.

— Prasan Surana
Director, Kravour Foods

that have increased the demand for foreign confectionery brands in the Indian market. Several brands like Ferrero, Mondelez, Meiji and Mars have come and conquered the Indian confectionery and chocolate market. These examples are an inspiration for other brands who consider India as a potential market for their brands. The demands are constantly rising and thus creating more demand for newer varieties like gluten-free, organic, vegan, etc. Hence, the opportunity for foreign brands to enter the Indian market is growing rapidly.

Marketing strategy: The company believes that a unique and innovative approach for packaging confectionery and chocolates will help retailers in meeting the demands of their customers. Developing and putting in place an in-depth distribution channel to achieve direct interaction with retailers and customers is the key marketing strategy for the brand. It feels that there is a need for stronger laws to keep a check on duplication and substandard products. It believes that stronger regulatory checks should be put in place to check against fake and substandard brands that pose a health hazard for consumers besides putting companies with genuine products at disadvantage.

Challenges and outlook: There is a gap in the market when it comes to the reach of confectionery products. Kravour Foods is trying to tap those gaps by continuously launching newer variants and products. It has a variety of product range to offer to its channel partners and retailers. Big international brands dominate the confectionery and chocolate market in the Modern Trade channel. Competing with these popular brands, creating a viable positioning for its products and making a mark with the customers is not an easy task for a young brand like Kravour Foods. It is hard to get acknowledged among the larger and more popular brands and to compete with them. And yet, the company is determined to make it big and create a strong market for its products. **PG**





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Chocolates moving beyond the milky way!

The fast growing Indian confectionery industry has seen many global players waving the flag of success and, this has grabbed the eyeballs of several other foreign players wanting to enter the country with bold strategies.



I believe Pacari chocolate is the Lamborghini of chocolates and there can't be many Lamborghinis parked at the same place.

— Santiago Peralta
GM & Founder,
Pacari Chocolates

India's gigantic appetite for chocolates has opened various avenues for international brands looking to venture into the burgeoning Indian chocolate market. Interestingly, the acceptability of food innovations and inclination for organic and finer foods have transformed chocolate consumption patterns and made way for newer trends to influence the growth of this segment.

As per a recent research report by Euromonitor: The chocolate confectionery value sales are expected to see a constant value CAGR of 8% over 2016-2021 to reach INR 162 billion. Increasing availability in various Tier I and Tier II cities will contribute to chocolate confectionery growth during the forecast period.

What's driving the growth of this toothsome market is the growing awareness among consumers, increasing disposable income and the aspiration to move beyond the traditional taste preferences. These factors have encouraged the growth of various international brands like Mondelez India, Ferrero SpA, Lindt & Sprüngli and made way for new global players like Pacari to enter the market.

While talking about his views about the global chocolate market, Santiago Peralta, General Manager & Founder of Pacari Chocolates, said: "Globally people are shifting from traditional chocolates to unconventional. In fact, the sweetness of chocolates is deriving this shift in the preferences of consumers. Hence, they are moving toward healthier options. I feel the new trend is about the original chocolates, high-quality chocolate, gluten-free chocolate, organic chocolates, etc. I believe that people are becoming more 'picky' and specific in terms of their choices. Consumers are keen on having novelties and trying something new that not only suits their taste preferences but is healthy. This is influencing their nature to be more selective."

Guilt-free fusion of chocolates

Over time, chocolates have replaced the traditional love for Indian sweets. In fact, this millennial-driven trend has made it easy for confectionery players to clamber.

Ecuador is one the largest producer of cacao in the world and the same goodness of nature has been the unique proposition of Pacari Chocolates.

"Pacari Chocolates have gone beyond the conventional forms of chocolates by introducing chocolates which are in their original form. We have infused the fine Ecuador cacao with many organic and exotic ingredients like berries, lemongrass, pink salt, chills, chia, spirulina, nuts, etc. Our chocolates acquire the natural flavor of Ecuador cacao which has fruity and floral notes this is what makes our chocolates smooth and silky without any added milk or sugar," said Santiago Peralta.

Hitting the sweet spot

Expressing his views on reaching out to the right customer and right retail strategy – Chetanya Singhal, Chief Marketing Officer of Mandara Orchard said, "after winning many accolades in the international market, fine chocolate brand Pacari ventured into the country around December two years ago through Mandara Orchard and started





next to impossible, but Pacari is of the opinion that the Indian market has no competition for the brand. “Indian chocolate market has only seen mass production brands like Mondelez, Mars, Ferrero, Lindt, etc. There is no direct competition in the Indian market. Our brand is not into mass production; rather we produce smaller amounts of products that are custom made chocolates. Also, I feel that there is no fine chocolate brand in India which would offer tailor-made chocolates. There are local leaders, definitely, but our chocolates have a different proposition altogether,” said Santiago Peralta.



retailing through gourmet stores and retail chains like Foodhall, Godrej Nature’s Basket, Future Group, Namdhari’s, Nilgiri’s, Le Marche, Spencer’s, etc. We are also present in five-star hotels like the Grand Hyatt Mumbai. We are also available online on Pacari’s website. So these are our few tie-ups till now and to move forward, our prospective alliances would be with event management companies. Moreover, we are looking at ‘gifting’ as a huge potential market, especially the corporate gifting, wedding gifting, festive gifting, etc. I feel, wherever there is the appreciation for fine foods, we see it as our target segment.”

Santiago Peralta added, “I feel that Indians will love our chocolates. We are focussing on the upscale markets especially the HNIs. I believe Pacari chocolate is the Lamborghini of chocolates and there can’t be many Lamborghinis parked at the same place. Precisely, we are targeting the upscale, hi-end consumers, food connoisseurs and people who appreciate fine foods are our potential customers.”

“Basically, there is awareness only in the hi-end market. Our chocolates are bit expensive as we are not a mass production brand and are only into tailor-made fine chocolates. So our target market is the upper middle class to HNIs. We are hopeful that the fine chocolate category will flourish in the coming future. Our products are priced nominally like Lindt and other premium chocolates. But this should not stop people from giving it a shot. In fact, the heritage of this brand will be the factor leading to its popularity. We want to position Pacari as a premium product brand in the market,” added Chetanya Singhal.

Cutting the cut-throat Competition

Establishing a brand without any competition is

Sizing up the right strategy

The fast growing Indian chocolate industry has seen many global players waving the flag of success. This has, eventually, grabbed the eyeballs of several foreign players and lured them to enter the country with some transforming strategy. However, reaching out to the prospective client and customers need a concrete plan and proper engagement.

Chetanya Singhal talks about their engagement plans in the country: “We know that we are selling good quality products. We would never sell anything that degrades the quality of our products and the brand name. At this stage, all we need is to identify the right people and association to spread the word. Also, we need to join hands with the industry bodies like FICCI, CII and establish business networks through mass media and social media. We need to have associations with a couple of food and media associations. So that we can spread the word to the right audience for our brand.”

Gazing through the future ball

Venturing, sustaining and flourishing in any market defines a brand’s journey. India has become a potential market for global brands. Precisely, the right strategy to nail the right consumer demographic has been the major success catalyst for these international brands.

“We came across people who were aware of fine quality chocolates in cities like Delhi, Mumbai, Bangalore, Jaipur, Hyderabad. This became the starting point for the brand’s journey. Moreover, we have plans to move to Tier II cities like Jaipur, Pune, Ahmedabad. There is always a segment of consumers that want a finer and better quality of products but the concentration is more in Tier I cities. I believe universal food love can bridge gaps easily,” added Chetanya Singhal. **PG**



“Wherever there is appreciation for fine foods, we see it as our target segment.”

— Chetanya Singhal
Chief Marketing Officer, Mandara Orchard



Vegetarians, Bring it on

The demand for proteins in India, for food and feed, is expected to increase significantly in the next 5-10 years and there is great opportunity for the local industry to foray into plant proteins ingredients business as well as plant protein based food products. Seeing the attractiveness, quite a few Indian players from allied industry segments are entering into the plant proteins category.

By **Dr. Satyanarayana**

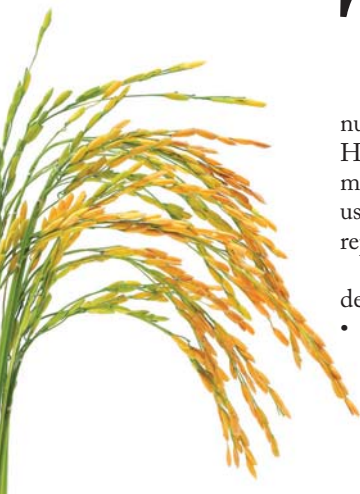
The number of food products and diets launched globally with higher protein content has increased in recent years. A high level of protein was generally associated with categories like sports nutrition, weight management, infant nutrition, etc. However, in the past few years, proteins have become mainstream food ingredients and are being increasingly used in other categories like energy bars, meal replacements, healthy snacks, yogurt, smoothies etc.

Some of the characteristics of protein that determine its applications in various products are:

- **Nutrition:** Amino acid profile, containing all essential amino acids, absorption, digestion etc.

- **Functionality:** solubility, stability, viscosity, foaming, transparency, behavior in acidic beverages, texture, moisture retention etc.
- **Clean taste:** Neutral flavor, aroma
- **Clean Label:** Non-allergen, Non-GMO
- **Processing:** Damage to proteins during processing adversely impacts nutritional and functional properties.
- **Price:** Cost of production/use

Traditionally, animal sourced proteins and soy protein, considered complete proteins, were used in various food applications. Rising cost of animal derived proteins, fear of antibiotic resistance with excessive



use of antibiotics in livestock farming, animal welfare concern, and environmental sustainability concerns are driving the food industry to explore new plant-based proteins as an alternative to the established animal-based proteins in the market. Consumer demand for 'clean' label (allergen-free, GMO-free) is driving the industry to look for alternatives to soya protein as well. Plant protein sources are also gaining popularity due to the health benefits of plant-based diets in lowering cholesterol and decreasing the risk of heart disease and diabetes; and providing higher fiber than their meat-based counterparts.

Certain consumer groups with diet restrictions such as vegans / vegetarians had limited choices of protein sources in the past. The advent of novel plant protein isolates and algal based protein ingredients and their increasing usage in food products has significantly increased avenues of protein nutrition for these category of consumers. Globally, the use of plant proteins is increasing rapidly with the growth of meat substitute products and the increased launches of plant-based food & beverage launches. Among plant sources, traditionally pulses/ legume crops were preferred choice as sources of proteins considering the relatively higher protein content than crops like cereals & millets.

However, now non-traditional sources like cereals (brown rice & wheat) and oilseeds (canola) are also being tapped for isolating proteins (Table. 1). This new trend is driven by the functionality and quality of the isolated protein, and not on the protein content per se in these sources. Plant proteins, in general, fall short of providing a complete amino acid profile. Various plant proteins can be blended to create a complete amino acid profile and to improve taste. For Example, AIDP's Advantein is a blend of brown rice and pea protein. Micro-algae is also emerging as another source of protein for vegetarians. Algae offers the advantage of high growth rates and shorter batch time, resulting in more protein per unit area than all other sources. The whole cell algal mass or extract can be used as protein source. The UK-based company Quorn uses Mycoprotein, produced from naturally occurring fungus through fermentation process, as a protein source in various vegan products.

Though plant proteins are becoming popular, they still pose some challenges for food manufacturers in product applications. Proteins from different sources have different amino acid profiles (essential amino acids) and digestibility, so 1:1 protein replacement is not feasible for all products. Some suppliers blend various protein isolates to improve nutritional value or to reduce costs. However, blending/ addition of another plant proteins may negatively impact the textural properties. Some of the plant proteins also have off flavors/ notes. Use of right technology across the value chain is key for alternative proteins



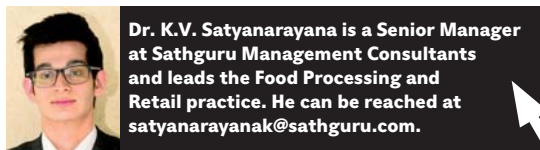
TABLE 1. LIST OF PLANT PROTEIN INGREDIENTS (OTHER THAN SOYA) AND THEIR COMMERCIAL SUPPLIER

Protein Source	Company name
Pea	Roquette, Puris, Axiom Foods, Burcon NutraScience
Brown Rice	Axiom Foods, AIDP
Rice/Pea Blend	AIDP
Hemp	Axiom Foods
Wheat	Tereos Syral, MGP Ingredients
Algae	Terravia
Fungus/ Mycoprotein	Quorn
Water Lentil	Parabel

business, including plant and algal sources. Protein production (crop genetics to enhance protein quality and yield), protein extraction & processing technologies and effective formulation are critical for extending applications of plant proteins to various food categories and thereby increasing novel plant protein's viability as a nutrition source. There is also a need for strong application and product development efforts for promoting algal proteins.

In India, higher income led diet diversification, impact of globalization, increasing urbanization and changing lifestyle of people is contributing to the changes in the food consumption pattern. The demand for proteins in India, for food and feed, is expected to increase significantly in the next 5-10 years and there is great opportunity for local industry to foray into plant proteins ingredients business as well as plant protein based food products. Seeing the attractiveness, few Indian players from allied industry segments (like Synthite Industries), are making entry into the plant proteins category.

With improvements in extraction, processing technologies and formulations, the challenges of off-flavor, solubility, texture etc. related to the plant based proteins are expected to be addressed. This will lead to increased incorporation of plant proteins in various food formulations with better organoleptic properties. **PG**



Dr. K.V. Satyanarayana is a Senior Manager at Sathguru Management Consultants and leads the Food Processing and Retail practice. He can be reached at satyanarayanak@sathguru.com.

Plant protein sources are also gaining popularity due to the health benefits of plant-based diets in lowering cholesterol and decreasing the risk of heart disease and diabetes; and providing higher fiber than their meat-based counterparts.



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Renewed push for protein in middle aged men and women

An absence of protein in daily meal consumption is responsible for several health problems showing up earlier in life, which can be obviated by making appropriate changes in the diet and allowing for an increase in our protein uptake.

By Dr. Siddhant Bhargava



One goes through a lot of phases with growing age, which further demands enough heed to be given to physiological changes and degenerative processes. It has been commonly seen that hormonal changes are quite normal in an individual's body with passing age, and it holds a lot of significance for our health and well being.

Generally, in a male body, after the age of 35, the testosterone amount in the blood begins to fall. Whereas it has been found that in females, after menopause, the estrogen and progesterone levels start going down.

This reduction in hormones further leads to several problems such as dry skin, hair loss, brittle

nails, fatigue, lethargy, lowering of mood, decreased libido, lowered muscle mass, slower metabolism, weaker bones and ligaments and susceptibility to fractures. Nevertheless, effective measures can be taken to cope with these symptoms and manage them well.

Essentially, an absence of protein in daily consumption is responsible for some of these problems. The two factors such as the ability to burn calories and produce energy hold a lot of relevance for controlling the metabolic rate of the body. Some of the most common symptoms arising out of a lack of sufficient protein consumption are a decrease in hormones such as thyroid hormone cortisol and epinephrine and the early onset of thin muscle mass or fat-free muscle.

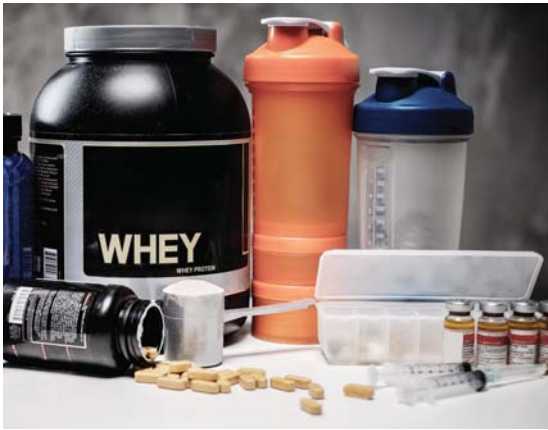
In order to reverse the symptoms mentioned above, it is crucial that we make some of the changes in our diet. These could be in the form of:

- Intake of total protein
- Upsurge muscle activation
- Initiate the release of human growth
- Prevent early cell degeneration through antioxidants



It is essential to track the stages and symptoms mentioned earlier, which will help in the prevention of muscle loss, metabolic drop and early aging. The complete protein intake for a middle-aged man or woman should be 1-1.2 gm of protein/kg of body weight. For example, females with a weight of 60 kg should have at least 60 gm protein. However, a man lifting weights four times a week should consume 90 gm of protein daily.

The usual protein sources are meat, eggs and fish for non-vegetarians and soya & oil seeds, nuts, cottage cheese and pulses for vegetarians. When it comes to the question of the correct time to consume, it is an established fact that each meal of the day should comprise a good amount of protein. However, early morning consumption of protein is good for health due to the presence of the amino



acid pool in the gut. Post workout, in order to keep the energy flow going, intake of protein is important. It strengthens the bio-availability and absorption of protein from the gut and helps in the development of hormones in the body.

Protein in every meal

In order to reduce blood sugar levels, consuming protein in each meal is vital as it leads to an upsurge in satiety and induces a persistent flow of amino acid. One thing to be noticed is that a deterioration in appetite has a very strong relationship with advancing age. People in middle age years are generally more prone to nutritional insufficiencies due to lesser intake of food, which further results in slowing down the metabolism. They should ideally increase their exercise activities along with an increase in the amount of food intake.

Another option is to go for powder-based protein, preferably supplements that eventually help in achieving the protein goals of the day. Supplements like whey protein, pea protein, casein protein, and collagen protein are available in milk/ water resolvable powders and play an important role in terms of protein unit consumption. They also complement our zinc, iron, magnesium and vitamin B consumption.

In addition, to avoid atrophy of muscles in the body, one should necessarily exercise. It is advisable to indulge in 45 minutes of exercise at least four times a week and also allow for an increased consumption of protein in the diet.

In middle-aged females, post-menopausal exposure to ligament tears, fractures and osteopenia increases. It is critical that they raise their collagen intake besides also carrying out strength building exercises. Ideally, to ensure an upsurge in protein consumption, each meal should encompass a protein source.


Significantly, in India, people are more prone to an excess of carbs in their meals. For instance, they generally tend to eat more of parantha, poha, rice and upma. It is suggested that they go for a little

addition of protein intake such as cottage cheese and egg whites, which will make for a more healthy meal. Consumption of a good amount of protein enhances the skin of an individual noticeably. Interestingly, the other parts of the body such as nails and hair also start glowing and become less dry and relatively healthier. Protein consumption triggers sebum production in the body, which acts as a natural moisturizer for the skin. Managing the aging process also becomes easier and smoother.

One of the common misconceptions people have is that a rise in the consumption of protein has a negative impact on the kidney. However, research done in this regard has helped to debunk such fallacies while building the case for higher protein intake amongst the elderly.

As a medical practitioner, I need to recommend that protein intake is inadvisable for people with chronic renal problem. Nonetheless, for healthy grownups, the addition of protein in their meals will lead to a healthy and more effective functioning of the body. **PG**

Significantly, in India, people are more prone to an excess of carbs in their meals. For instance, they generally tend to eat more of parantha, poha, rice and upma. It is suggested that they go for a little addition of protein intake such as cottage cheese and egg whites, which will make for a more healthy meal.



The writer is Co-Founder, Fitness & Nutritional Scientist – Food Darzee, a health and nutrition company that provides a unique customer experience combining nutrition, food, fitness, and impeccable customer service to help you achieve your health and fitness goals.





Amazon and Fexy Media have made recipes shoppable on SimplyRecipes.com, where visitors can order, through Prime Now ultra-fast delivery, all ingredients for select recipes with just the click of a button.

Clear and Captivating

Grocers desiring repeat ecommerce customers must provide content that is accurate and makes shopping more convenient and personalized.

By **Randy Hofbauer**

As food retailers continue their advance into ecommerce, a focus on clear, complete information is key to winning sales. Yet nearly all shoppers have jumped ship before making a purchase online, because they found content to be lacking, research from Irvine, Calif.-based digital commerce solutions provider Episerver shows.

According to the March report, "Reimagining Commerce," 98 percent of consumers have been dissuaded from such purchases due to incomplete or incorrect content, with nearly one-third (32 percent) of consumers being deterred every time. Further, more than one-third (35 percent) feel that brands do a poor or very poor job giving the online shopping experience a customized feel, showing that a large number of consumers today aren't finding the content they value when ordering online.



"Just as a poorly designed storefront or cluttered displays can deter shoppers from a physical store, a website or mobile app with lackluster content can turn off consumers and, in many cases, discourage them from making a purchase," said Ed Kennedy, senior director of commerce at Episerver, in March. "Our study shows consumers really care about content when shopping online, not only the quality and accuracy, but also how it's delivered to them. Complete and accurate content is now table stakes, and brands looking to go above and beyond must consider personalization."

To create a more consumer-friendly, personalized experience on their ecommerce sites, grocers should consider providing:

1) An exploration-focused landing page: While some shoppers head to a grocer's site knowing what they want to purchase, others are there to browse, knowing what they want when they find it. Peter Leech, partner and director of digital and ecommerce at The Partnering Group Inc. (TPG), based in Cincinnati, says that landing pages for these shoppers should explain, at a glance, two to five types of products, using light copy and clickable images that provide deeper subcontent upon shopper request. Expert finders also could allow the shopper to answer key questions that will lead to a recommended product list subset.

2) Shoppable recipes: From Amazon's recent partnership with Fexy Media to eMeals teaming with Walmart and Kroger, a growing number of food retailers are offering consumers the opportunity to find a recipe they like and fill their virtual cart with all of the ingredients needed to prepare that recipe, with a single click. Even Safeway, Leech says,

produces quality digital recipes whose ingredients can be purchased easily with the click of a button — seamless from idea to buy. Such solutions might not be meal kits, but could compete against meal-kit programs without the problems that come from portioning and preparing ingredients for immediate use in the kitchen.

“Studies suggest that 80 percent of us have no idea what we will be doing for dinner at 3:30 p.m. that same afternoon. Imagine if a retailer could make three dinner ‘suggestions’ personalized to their individual consumer a couple times a week,” muses food industry expert Matt Gutermuth, former president and CEO of Safeway.com, and founder of empowerpositive.net. “If you expand a consumer’s menu and make it easy and fun to do so, you give people less of a reason to eat out — the easy answer to the question, ‘What do you want to do for dinner tonight?’”

3) Nutritional data and ingredients: In an age when consumers are more health-conscious than ever, understanding what’s in a product is a paramount issue for many consumers. Prem Balwani, founder and CEO of Miramar, Fla.-based ecommerce platform iGrab.it, notes that 72 percent of customers on his platform research nutritional data and review ingredient information, which is what drove him to change the user interface to start highlighting total carbohydrates on product listings, giving customers easy-to-see information on the spot. In addition, customers want to make sure ingredients used are from fresh sources, and to look up ingredients. He suggests that grocers adopt modern nutrition labeling of items to make it easier for shoppers to read and even understand the information.

Raley’s has done something like this with its Shelf Guide labels, which, developed independently, include descriptions such as Minimally Processed, Nutrient Dense and No Added Sugar. The program was developed after the West Sacramento, Calif.-based grocer realized that even though recognizing ingredients is the No. 1 influencer of consumers’ decisions to purchase a food or beverage, 59 percent of grocery shoppers experience difficulty understanding nutrition facts on product packaging.

4) Ecommerce-optimized photos: While many grocers have ecommerce programs in place, not all present ecommerce-ready content, notes Courtney Acuff, VP of product and marketing with Chicago-based ecommerce service ItemMaster. For example, scale images and ecommerce-specific product descriptions help capture attention when viewing items “on the shelf” and examining product details before making the purchase. “If you look across ecommerce sites today, you’ll see widely different takes on consumer experience — the content exists, but is often not yet utilized,” she says.

TPG’s Leech adds that ecommerce leaders today are testing product images that are zoomed in to show a consumer using a mobile phone what they need to see at a glance without the need to manually zoom, which can blur the image. They’re also using content featuring key callouts, such as flavor in the main image section, to make the product easier to understand. For instance, in a listing on Jet.com for Keurig’s The Original Donut Shop brand of K-Cups, a closeup of a foil top displays as the main image, clearly showing the flavor currently being viewed.

5) Personalized suggestions: Consumers hate seeing ads completely unrelated to what they’re trying to purchase, meaning that grocers that place banner ads that aren’t applicable to the specific customer run the risk of turning that person off. However, Jeremy Neren, founder and CEO of Madison, Wis.-based GrocerKey, recommends that grocers make sure that they use data specific to shoppers to plan personalized ad campaigns for products that may appeal to them, based on purchase history.



“So, for instance, if you see a customer’s buying a high rate of organic items, when they’re searching the floor, put things like a digital end cap or some sort of engaging ad campaign in front of them to advertise other organic products’ relevance to that search,” he advises.

6) Guest checkout: Ecommerce is all about convenience, so giving site visitors the ability to shop without registering can be a critical way of providing quick and easy purchases while reducing cart abandonment, recommends Anush Viswanathan, account manager at New York-based data analytics firm Ugam. Moreover, when grocers prompt customers to register, they generally request personal information to use down the road.

However, many consumers don’t want their inboxes filled with promotions, discounts and company news. First-time customers especially want to take the site for a test drive without committing to additional communication. **PG**



If you look across ecommerce sites today, you’ll see widely different takes on consumer experience – the content exists, but is often not yet utilized.

— Courtney Acuff
ItemMaster

In a listing on Jet.com for Keurig’s The Original Donut Shop brand of K-Cups, a closeup of a foil top displays as the main image, clearly showing visitors the exact type of coffee that they’re viewing.

what's next



▲ **Sunkist launches healthy juices - Detox & Refuel**

Sunkist from California by Future Consumer Limited (FCL) has introduced a range of healthy juices like Detox, Refuel and Orange Mosambi. These juices are extremely nutritious and contain no added sugar and preservatives. Detox and Refuel juices are made with 100% goodness of fruits and vegetables. Containing fresh vegetables, Sunkist Refuel is prepared using lemon, ginger and beetroot. The drink acts to refuel for your body making you feel energized even after a long day. The range also includes the classic Orange Mosambi, which is a mix of orange and sweet lime; available in two pack sizes 200 ml at Rs. 35 and one liter at Rs. 130. Sunkist Detox and Refuel come in 200 ml packs, priced at Rs.40 and are available across all Big Bazaar, Big Bazaar GEN NXT, HyperCity, Easyday, Heritage and Nilgiris stores in the country.



▲ **Nutty Yogi launches a range of Christmas and winter specials**

Nutty Yogi, a natural and organic food brand designed for foodies and health buffs alike, has launched a range of products – Cinnamon Apple Pie Muesli, Crunchy Cinnamon Almond Butter, Turmeric Latte, Turmeric Honey, Rhododendron Chutney, Winter Trail Mix and Masala Cranberries. The products are made using Indian super spices and foods like Turmeric, Cinnamon and Honey, which are a very good protection against common cold and cough. The products come with other health benefits like weight loss, anti-inflammatory properties and they help in lowering the blood pressure as well. The products are available on www.nuttyyogi.com with prices starting from Rs. 120 for a 100 gm pack and Rs. 599 for gift hampers.

◀ **MunchhOnn launches non fried low fat snack**

MunchhOnn has added a new range of product in its product basket. MunchhOnn Yummy Tummy Stix is a new generation non fried low fat snack and includes flavors such as chili chatka, Italian maza, Mexican masala and tomato twist. This delicious snack will keep you munching and without any guilt. The product is manufactured in AFP's ultra-modern automatic plant equipped with state-of-the-art machines. The healthful and flavorful snack comes in a pack size of 15 gm priced at Rs. 5 for and 30 gm for Rs. 10 and is available in all the northern States.



▲ **Jumbo's new bar chocolate offerings**

Pee Pee Group, a leading manufacturer of coin chocolates in India, which also manufactures bar chocolate varieties under the brand name of Jumbo, has now launched three more new varieties in bar chocolates in 38 gm pack size . Premium milk with roasted almond, Premium milk crisps and 38 gm Dark with roasted almond varieties. Jumbo Bar chocolates has rich cocoa content are made with premium quality cocoa . Jumbo chocolates are 100% vegetarian, rich in taste and liked by all age groups. The Milk Almond & Milk Crisps varieties are Rs. 45 whereas Dark with roasted almond is priced Rs. 75.



▲ **Fazlani Foods to launch Paneer Nihari with 18 months' shelf life**

Fazlani Foods will shortly bring on the market an exciting new variant of Paneer Nihari, which has been developed by its NPD team in collaboration with specialist chefs that it brought on board for developing the product. The product has been developed keeping in mind the palate preferences of Nihari lovers. "Nihari is quite popular among non-vegetarians and hence our chefs on-board and NPD team thought of doing something exclusive," says Brand Manager Zeeshan Kolsawala. Since inception, the company's focus has been on providing quality ingredient and convenience to end users without compromising on taste. Fazlani Foods' Paneer Nihari will be available in individual boxes as curry and as a combo meal with steamed basmati rice. The product's shelf life will span 18 months and it will be available online at Amazon and Flipkart as well as at leading retail stores across India. For more details about the product, visit www.readytoeat.com.

► **Guilt-free munching with Cornitos Tomato Mexicana**

Greendot Health Foods Pvt Ltd, the first company to launch nacho crisps in Indian snacks, has introduced Cornitos Tomato Mexicana Nacho Crisps this season to make snacking time much tastier and guilt-free. Cornitos Tomato Mexicana has an exotic flavor of juicy red tomatoes and jalapenos that instantly capture the taste buds. Cornitos Tomato Mexicana Nacho Crisps offer the natural sweet-sour taste of tomato, which makes it the most loved Cornitos flavor among teenagers. For consumers who prefer snacks without onion and garlic, Cornitos Tomato Mexicana is also available in no-onion and -garlic flavor. The product is available in different pack sizes and priced Rs. 20 for 30 gm, Rs. 35 for 60 gm and Rs. 85 for 150 gm and sell across leading retail outlets in India. Cornitos Nacho Crisps is healthy snack made from corn and is cooked in healthier corn oil. It is gluten free, zero cholesterol and zero trans fat.



▼ **Black and Green Products launches multipurpose avocado oil**

Black and Green Products, a new entrant in the FMCG industry, has recently launched India's first true multipurpose avocado oil. It is the country's only home grown brand of extra virgin cold pressed and unrefined avocado oil. Rushabh Parikh, Co-founder Black and Green says: "We are very excited to bring this amazing product to Indian consumers and hope to kick start an avocado oil revolution, #AvoRevolution. Avocado oil is the healthiest oil in the world and can be used for all cooking and beauty needs due to its high smoke point and penetrative properties. It has a very buttery taste just like an avocado, also known as makhnaphal in Hindi. It helps fight against various diseases such as cholesterol, diabetes, eczema and arthritis to name a few." Black and Green avocado oil has just been launched and the product is available in various outlets in major cities as well as on Amazon India and also through the company website www.blackandgreenproducts.com. One can visit Black and Green Products' website to know more about avocado oil.



▲ **LB Industries launches Ray NoSugar with easy snap sachets**

LB Consumer Goods Pvt. Ltd. has brought out Ray NoSugar, a liquid natural sweetener made from pure stevia extract. This new product comes in innovative, never seen before, easy snap sachets. These single-use sachets are convenient, mess-free, and pack-in the sweetness of 2 tsp of sugar. This liquid sweetener is 100% safe and can be consumed by everyone including diabetic, obese and health-conscious people. There are no added flavors, chemicals, or additives and it has absolutely no side-effects. It scores zero on the Glycemic Index and does not increase blood sugar (glucose) or insulin levels in the body, which goes a long way in maintaining a healthy body. Ray NoSugar is currently available in packs of 45 Easy Snaps with leading e-commerce platforms such as Amazon, Snapdeal and Flipkart.

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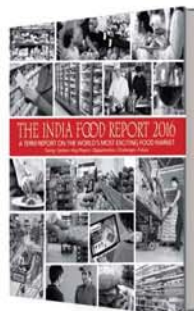
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