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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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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 concertedly 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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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.



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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.

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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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T. THANUSHGARAN
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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 layout's 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.





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



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





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