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INDIA EDITION

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'LOVE ALL, SERVE ALL, IS OUR CREDO'

— KUNAAL KUMAR
OWNER, MODERN BAZAAR

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WATCH**

The Spice Route
Journey: Market and
Trends





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Why go to the store? We saw a few jaws drop during a session at the recently concluded India Food Forum conference, when a speaker questioned the need for physical stores. I thought the question was particularly timely, considering our outlook of the omnichannel world, going ahead. I mean, most surveys seem to indicate that, while consumers are increasingly embracing online grocery shopping, they also express a desire and affection for the experience delivered by a trip to the store.

Online groceries are a rising trend. Near-future predictions include: Online grocery will grow steadily as consumers get a lot less anxious about buying produce online. Grocers will try to move to pure e-commerce models to handle the rapid growth, but will be stymied by lack of skilled personnel. And grocers will scale out their private label on any channel they can get their hands on.

The innovator's dilemma is currently real for every grocer on the planet, many of whom don't understand the nuances of technology-driven marketing. Not many existing supermarkets are prepared for the impact, even though they are doing their best to adopt as much tech as they can. Unfortunately, we've found that margin improvements required to win online groceries mean that they will probably have to be technology companies, applying data and code to stitch together a new way to build for the next hundreds of millions who have really started to dislike shopping at stores.



Amitabh Taneja
Editor-in-Chief

All feedback welcome at editorpgindia@imagesgroup.in

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COVER STORY

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“Our motto is ‘love all, serve all’ and our tagline is ‘largest variety of imported and Indian goods and groceries’”

Kunaal Kumar owns the Modern Bazaar store chain in Delhi-NCR. He is a passionate grocer with almost 28 years of hands-on experience running modern grocery retail outlets in some of the toniest locations in Delhi-NCR. It currently operates nine stores over a total retail area spanning 40,000 sq. ft.. Modern Bazaar stores stock about 15,000 SKUs across a product range that covers all home care products, Indian and imported food products including groceries, staples, fresh ready to eat, bakery, chocolate, in-house products of nuts, dips, sauces, and personal care products.

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The Spice Route Journey: Market & Trends

As taste buds are growing bolder, consumers across the country are becoming more adventurous and willing to try new, exotic, flavor profiles. Retailers are seeing a strong customer demand for gourmet, international, and ethnic spice blends as customers become more aware of ethnic and foreign cuisines. On their part, suppliers of spices are working with retailers to promote sales, but most agree that the important tactics are cross-promotion and sampling. On their part, retailers should try their best to cross-merchandise within the store between departments and provide food demos with support from suppliers.

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Market Update

SIAL China 2019 to offer a unique platform for exchange and business opportunities with Asian markets

SIAL China, the largest food innovation exhibition in Asia will be held from May 14th to May 16th, 2019, in Shanghai, China. With an estimated 4,300 exhibitors and 112,000 professionals expected to attend this year's exhibition, SIAL China will provide food professionals with a unique platform for exchange and business opportunities with Asian markets. In 2018, 28% of all international exhibitors and 62% of international visitors at SIAL China came from Asia, a key region for SIAL China organizers who have actively conducted promotional activities, including an upcoming series of press conferences to be held February 27th in Thailand, February 28th in Malaysia, March 1st in Singapore, and March 5th in South Korea.

How and what people consume in Asia is being impacted on a daily basis by technological innovation and a growing middle class. In 2018, cross border e-commerce trade was up 50% which, accompanied with advanced logistics and online shopping platforms helped Chinese consumers access and develop a taste for exotic food and beverages including fruit, seafood, and local specialty products, which have traditionally been less commonplace on Chinese tables. Meanwhile, in Asia Pacific, 63% of consumers



File Photo

view their mobile phones as their most important shopping tool.

At the same time, Asia's middle class has grown significantly giving them financial access to imported goods. According to a 2017 study by the Brookings Institution, 88% of the next one billion people to enter the middle class globally will be from Asia, and by 2030 Asia's middle class is expected to reach nearly 3.5 billion people or 65% of the world's total. "Whether your objective is to understand more about the dynamic Asian market, or introduce products to world visitors, through our professional events, online match-making system, and marketing events, SIAL China is a convenient and effective way to start a dialogue with your target customers and partners." said Jim Liu, President of SIAL China.

At SIAL China 2018, all Asian countries experienced

stable and steady expansion. South Korea was among the top 10 countries in terms of pavilions floor space and the number of exhibitors, while Japan increased its presence significantly. In terms of professional visitors, Korea, Japan, Thailand, Malaysia, Singapore, and Indonesia were all one of the top 10 international countries. Exhibitors and professional communities from Asian countries and regions have been active participants in SIAL China signature events like SIAL Innovation, a presentation of the world's most innovative food products. In 2018, products submissions from Sappe Public Company Limited of Thailand and Hsu Sheng Food Enterprise Co., LTD., from Taiwan region, were both SIAL Innovation finalists. At La Cuisine, a demonstration area dedicated to foodservice professionals, chefs from South Korea, Malaysia, and the region of Hong Kong

showcased their impressive skills and creativity. While leading players like Pran Export from Bangladesh; Al-Faheem Meatex Pvt. Ltd., Allanasons Pvt. Ltd. and HMA Argo Industries Ltd. from India; Chek Hup and White Coffee from Malaysia; Super Group from Singapore; SunHae from South Korea; the Sri Lanka Tea Board; Sappe and Malee Group from Thailand; and Me Trang from Vietnam led the way with impressive exhibitor performances.

Asia's dynamic food landscape is significantly boosting intra-regional food trade. In 2016, 36% of all food imports in Asia came from other Asian countries, according to The Economist. At SIAL China 2019 the Asia Zone will be expanded to Hall E1, E2, and E3. For more information, including SIAL China 2019 visitor registration, please go to www.sialchina.com.

Parle Agro signs Varun Dhawan as the new brand ambassador for Frooti



Parle Agro, the largest Indian beverage company, has signed up actor Varun Dhawan as the new face for its flagship brand Frooti. In the new 360 degree integrated communication by Frooti, Varun Dhawan will be seen in a new fun-filled avataar with his real life friend Alia Bhatt. The new campaign featuring the two real-reel life friends in the surreal world of Frooti will be rolled out this summer, further immersing

the fans into #TheFrootiLife with Bollywood's two most energetic, quirky and naughty icons. It is for the first time that the brand communication will showcase two celebrities.

Commenting on the association, Nadia Chauhan, Joint Managing Director and CMO, Parle Agro, said, "Introducing Varun Dhawan as Frooti's new brand ambassador is a step towards accelerating our aggressive ambition to

be the no.1 in mango drinks segment. The presence of Varun alongside Alia will help us connect better with the consumers to take the brand to newer heights." Expressing his excitement on the association with Frooti, Varun Dhawan stated, "I am thrilled to be associated with Frooti as it not only brings forth memories but also personally connects with me even today. I look forward to taking the fun world of #TheFrootiLife to all my fans and invite them to be a part of this fun-filled journey." Further commenting on her continued association with Frooti, actor Alia Bhatt added, "Frooti is the drink that I truly relish and enjoy. I look forward to immersing myself once again into the magical world of #TheFrootiLife with one of my closest allies Varun".

Parle Agro also continues its association for the second year in a row with Tollywood superstar Allu Arjun as the face of Frooti in South India.

Walmart supports kirana members with PhonePe's secure payment options

Walmart India, the wholly owned subsidiary of Walmart Inc., and digital payment platform PhonePe, entered into a partnership to launch PhonePe as a payment option at Walmart India's 23 best Price Modern Wholesale "B2B Cash & Carry" stores. PhonePe is part of the Flipkart Group, in which Walmart has a majority stake.

Under the new collaboration, registered members of Walmart India's Best Price Stores across the country will now be able to pay for their purchases via the PhonePe app on their mobile phone, drawing on funds from a bank account using the secure Unified

Payments Interface (UPI) or from a PhonePe wallet, third-party wallet, credit card or debit card.

Announcing the launch, Krish Iyer, President & CEO, Walmart India said, "This initiative reiterates our commitment to help kiranas and other small businesses to prosper. UPI is the fastest-growing type of digital payment in India, providing convenience and a seamless experience to users. The PhonePe payment system will help our members streamline their business processes and spend more time in their stores with customers. By using PhonePe in our B2B cash-&-carry stores, our members are contributing to India's growth as an efficient digital economy."

With over one million Best Price members, mainly kiranas, now being introduced to PhonePe's digital payments, the company is accelerating its push to drive offline transaction traffic as the next step for the adoption of digital payments in India. PhonePe recently surpassed one million offline merchants on its platform following partnerships with major retail chains across India. The cooperation with

Walmart India is set to accelerate PhonePe adoption by kiranas and other small businesses, and help introduce them to digital payments.

Offering innovations such as interoperable QR codes and a range of point-of-sale devices, PhonePe makes it easy for micro-merchants and other small businesses to make and accept digital payments. These offline partners can now accept UPI payments from their consumers through PhonePe's interoperable UPI QR code solution.

PhonePe's digital payment solutions complement other physical and digital payment options offered at Best Price Stores and make UPI payments available for the first time at Best Price Cash & Carry stores. With UPI, Walmart India members can instantly pay for their purchases directly from their bank account via PhonePe without sharing their bank details. This will greatly benefit kiranas and other small businesses that do not have a credit card, debit card or e-wallet, letting business owners save time by avoiding bank visits to transfer funds for purchases from Best Price stores.



Euromonitor reveals the top three megatrends driving disruption in India

Euromonitor International identified three key megatrends re-shaping the Indian market:

- ▶ **Connected Consumer:** Connectivity is at the forefront of changing the consumer goods industries. It has redefined accessibility and consumer awareness, changing the way they live, work, shop and play. In 2018, India had 560 million internet users and expect 99 percent of mobile subscribers will have access to internet on their mobiles by 2030.
- ▶ **Premiumisation:** Indian consumers have the power to spend on what matters to them. With growing incomes, consumer expenditure grew 13 percent in 2017- 2018, while discretionary spending is expected to increase by 45 percent by 2025.
- ▶ **Shopping re-invented:** In India, Internet retailing is expected to double by 2030. Retail distribution will continue to blur and an omnichannel strategy will become mainstream as consumers develop an everything and everywhere mindset.

ITC Savlon’s Healthy Hands campaign makes it to the Global Index list



WARC Effective 100 global index released earlier this month has ranked ITC’s brand Savlon’s campaign “Healthy Hands Chalk Sticks” at number #2.

The campaign conceptualised and implemented by Ogilvy Mumbai, in collaboration with ITC’s Personal Care Products Business Division, aimed to facilitate behavioural change among primary school children by promoting hand hygiene through the unique healthy hands chalk sticks campaign.

Savlon, ITC’s leading hygiene brand, unveiled The #SavlonSwasthIndia Mission, a programme designed to encourage behavioural change towards washing hands amongst children through various engaging and entertaining educational initiatives in schools. In line with Savlon Swasth India’s proposition of ‘Healthier Kids, Stronger India’, the programme introduces interactive activities including a series of storytelling and visual engagement that educate and encourage children to adopt good hand hygiene practices.

The Savlon Swasth India Mission introduced

an innovative engagement with Savlon Healthy Hands Chalk Sticks – a set of unique chalk sticks infused with cleansers like soap. The chalk sticks are designed to engage children in primary schools and emphasise the importance of washing hands before eating.

Sameer Satpathy, Chief Executive, Personal Care Products Business, ITC Limited, stated, “We at ITC are indeed proud that Savlon Healthy Hands Chalk Sticks has been recognised by WARC Effective 100 as an impactful campaign. Hand Hygiene is today a critical issue. We believe, to induce behavioural change among children, the process of communication and education has to be fun, engaging and memorable. In that context, Savlon Swasth India’s ‘Healthy Hands Chalk Sticks’ is a simple yet interesting innovation. It is an engaging way to educate children on the importance of washing hands, especially before eating. This is one of the various educational tools deployed by the Savlon Swasth India team to help initiate children into the habit of washing hands.”

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CEOs 2020 Vision for the Grocery Sector

At the 12th edition of India Food Forum last month, CEOs of major grocery chains and leading retailers deliberated on the ways to prepare and face challenges such as the rapid rise in e-commerce and digital ecosystem management and come up with the right strategies for adapting to the needs of evolving customers.

By **Aliya Jamal**

Food and grocery is the highest contributor to the Indian retail market. The segment has been clocking double digit CAGR over the years and is estimated to continue growing 14-15% in the years ahead. To grab this immense opportunity and potential, grocers should have the right business strategy, plan, tools, techniques and the capability to execute. However, the segment is also in the throes of major revolutionary changes. The landscape of modern trade has been constantly evolving over the years even as customer demands and preferences have been witnessing significant shifts. Amidst all the churn taking place, it has become quite a task for retailers to stay relevant. So, while there are many challenges on the way, retailers need to transform those challenges into winning opportunities.

Damodar Mall, CEO, Grocery Retail, Reliance Retail, brought into focus the issue of customer's evolving preferences and the diverse

needs of the new-age generation. He observed: "2020 is not that far off and tomorrow's consumers are shopping and consuming our brands and evolving. We will see newer brands being launched and some of them will open new areas of consumption and pave the way for more potential business in the years ahead."

According to **Oliver Mirza, MD, Dr. Oetker India**, "We see lots of signals and signs of the evolutionary changes in consumers. One of them is the shifting preference towards all things natural and organic. We see higher quality and more premium brands coming up. But the significance of value for money and value for quality is still there and I don't believe that it is going to change anytime soon."

The challenges of 2020

There is a growing consumer demand for organic and natural in the food segment as well. This development has also led to the building of newer



categories and sub-categories within existing categories over the years. At the same time, there is greater global exposure and foreign food choices in the Indian market. “At present, there is still demand for staple cereals and pulses and traditional food. But certain categories like salad pasta, vegan and gluten-free have also seen a dramatic rise among customers. This has become a challenge for retailers to understand the needs and demands for an all-in-one package deals. All the more so, because today a family of four asks for four different kinds of breakfasts on the same table – from salads to cereals to fruits and egg and bread. It is a platter and we need to understand it and provide to the customers,” noted **Ramesh Menon, CEO, Small Formats, Future Group.**

According to **Aseem Soni, CEO, Modern Foods,** “People today are demanding niche products and things that they did not have before. The success of certain startups over a time period of 6-7 years validates the changing preferences of people and their evolution over a period of time.”

Even as we look ahead to 2020, the future is actually aborning right now. And the sooner we adapt to it, the better it is for everyone to prepare for the action and put the puzzle pieces into place. At the same time, the lines are blurring between rural and urban demographics and the challenge is more immediate. “The challenge is here and now – whatever is happening – just go with the flow and with the pace. We did a campaign called “quiet hour”, which was dedicated to people with autism. I received appreciation and a lot of old friends felicitated me who were not even in touch for 25 years. There is no need to worry about the connections and networks that we are supposed to make; just do your job and people will eventually recognize your good work,” remarked **Sadashiv Nayak, CEO, Food Business, Future Group.**

Consumer Choices

Today’s empowered and articulate consumers have become very serious about the food quality and its health aspects. These trends have been observed in metropolitan cities as well as small towns like Gwalior and Gorakhpur. With India on the cusp of a healthy food revolution, the demand for healthy and fresh food has seen the country rapidly become one of the largest consumers of fresh and organic food. Hence, there is more demand for newer variants in the market by consumers from different regions across the country.

As these changes become more visible, Modern Retail has to learn to respect and discover more traditional foods that Indians will continue to consume. It needs to leverage the power of e-commerce and home delivery more effectively and synergistically. “The shoppers are still very traditional caregivers at home and they still want to



“

I look forward to all the retailers and the modern traders to create the space in stores to accommodate all the new stuff and to adapt to all the new food habits so that we catch up with the expectations of the consumers in the long run.

— **Arvind Kumar, CEO, Dukes**



“

More of modernity and more modernization of products will happen going ahead and physical modern retail and digital modern retail will continue driving the consumption pie bigger and benefiting from it.

— **Damodar Mall, CEO, Grocery Retail, Reliance Retail**



“

When modern retail earns then we as a brand learn. India has a great consumption story unfolding and if brands design specifically for modern retail then we have got the job half done.

— **Akash Goenka, Director, Goldiee Group**



“

New technology and advances are enlarging the scope for packaged foods but we are still not ready for packaged foods to be consumed by large number of families.

— **C Gopalakrishnan, Founder, N Supermarkets**



“

Modern retail is perfect for someone who wants to go out and experience and explore and find for herself what is good for them. Then, there are some supermarkets where a customer goes for buying only value products.

— **Mohit Anand, MD, Kellogg India and South Asia**



Today, shoppers in increasing numbers are going for Modern Trade but traditional business will always remain in the reckoning because it is where customers look out for their daily requirements.

cook family meals out of fresh products, and they want solutions around the same. The way forward, more than anything else, is possibly to get more local and more traditional. And when things come to branding and launching of new products, somehow we are still being very western in our approach and we are not looking at traditional foods. Not only in the context of packaged foods but with the regional and traditional foods. I think that the next growth phase is going to come from the regional foods and from those regions that we are getting closer to in understanding the consumption of customers from those particular regions,” averred **Mohit Kampani, CEO, Aditya Birla Retail.**

Elaborating on the significance of offering diverse consumer choices, Ramesh Menon said: “I keep saying that the dining table in households today resembles a food court. There is a part of the family eating traditional roti chapati and there are different members within the same family who enjoy salads or bread and omelette. And that is the challenge of 2020 – to identify the different needs of consumers and to provide them with those products. The challenge for marketers is to convert it into a package form and convert it into processed form and to make it available for the consumers.”

To be able to create the space for newer food categories and for those products to be accepted by the consumers, the focus should be on building category penetration rather than seeking profit off newer categories. Brands should join hands with retailers to build newer categories like mayonnaise with the focus on product penetration and maximizing the number of people using the product rather than looking to maximizing the turnover off a few people in the long run.

“Customers want Modern Retail to become more vibrant. The brands being launched now feature new products. Dukes has almost 8-9 products ready and I look forward to all the retailers and modern traders to create the space in stores to accommodate all the new stuff and to adapt to

the new food habits so that we catch up with the expectations of consumers in the long run,” pointed out **Arvind Kumar, CEO, Dukes.**

Explaining the different kinds of customers visiting a modern retail outlet today, **Mohit Anand, MD, Kellogg India and South Asia, said:** “There is someone who wants to go out and experience and explore and find for herself what is good for them. Modern retail is perfect for that as it offers a range of options. Then, there are some supermarkets where a customer goes for buying only value products and the profile of such customers is different from those who are looking to explore and experience.”

Different platforms for customers

At a strategic level, offering multiple platforms is a mandatory thing to have for all retailers in modern trade and even for the traditional retailers. The question, however, is about which model emerging successful in the long run – Will it be the integrated omni-channel approach or whether it will be the standalone e-commerce model – each has its advantages and disadvantages.

Today, shoppers in increasing numbers are going for Modern Trade but traditional business will always remain in the reckoning because it is where customers look out for their daily requirements. “However, with new technology coming up, the scope for packaged foods has been enlarged but we are still not ready for quality packaged foods and its large scale consumption and adoption by families is going to take time. In my opinion, e-commerce will click for certain products but it definitely is not going to take up the whole food and grocery business,” opined **C Gopalakrishnan, Founder, N Supermarket.**

“In my opinion, a seamless multi-channel will work in the long run where customers can decide on how they choose to interact with the retailers; and that is the direction in which all retailers should work toward,” Mohit Kampani added.

Whichever way the customer wants to shop for the product, retailers should be ready to provide it to them through all the platforms, and home delivery is just one of the ways. But home delivery also acts as an impediment to product motivation from the manufacturer point of view. When customers opt for home delivery of a product, that decision is coming out of their memory and it lacks all the options for product discovery and exploration, new launches and new products coming into the market; and that is where retailers need to find a solution.

“Whenever I paint with one brush it never turns out to be successful. However, when I listen to my sales teams and brand managers sitting somewhere in the country, the results are better. That young person in his 30s has a better understanding of the mindset of the the millennial consumers and after

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For the second year indian chef Saransh Goila is the ambassador of **OLIVES FROM SPAIN**, whose customized recipes represent the infinite possibilities of **OLIVES FROM SPAIN** within the Indian cuisine.

“

I think that the next growth phase is going to come from regional foods and from those regions where we are getting closer to understanding the consumption needs of customers.

— Mohit Kampani, CEO, Aditya Birla Retail



“

People are demanding niche products and things that they never had before. The success of certain startups over the time period of 6-7 years validates the changing preferences of shoppers and their evolution.

— Aseem Soni, CEO, Modern Foods



“

Catering to different choices and understanding the needs and demands for an all-in-one package deal has become a challenge for retailers. It is a platter that we need to understand and provide to customers.

— Ramesh Menon, CEO, Small Formats, Future Group



“

We are seeing more quality and higher premium brands coming up. But value for money and value for quality is still there and I don't believe that it is going to disappear anytime soon.

— Oliver Mirza, MD, Dr. Oetker India



“

Future Group has its expanse across 170 cities and through our experience we can see that there is a requirement for a more diverse range of products. As retailers, we should add layers to the shopping experience.

— Sadashiv Nayak, CEO, Food Business, Future Group



validating the inputs through research, it makes more sense. Even though my costs are a bit high for the service but it is not an issue,” observed Aseem Soni, explaining on the need for understanding the mindset of the millennials.

With e-commerce, customers get the advantage of browsing and selecting a vast range of product variants and SKUs, which is much more than modern trade can offer. “The customers gets a lot of variety to choose from and it would be better for modern trade retailers to open up more SKU options for their customers,” opined Akash Goenka, Director, Goldiee Group. “I would say that when modern retail earns then we as a brand learn. India has a great consumption story unfolding, which is set to increase even further. I think that if brands design products specifically for modern retail, then we have got it half done. So I feel that thinking about the future and preparing for it can be a game changer for both brands and retailers. Having some specially designed products with some campaigns in modern retail shelves would be really great.”

Sadashiv Nayak of Future Group spoke of the challenges of expanding consumer choice in the rural areas and small towns. “Ensuring regular supply and product availability is a challenge even though customers want more choices and demand customization of their choices.” Private labels are rising to meet this challenge. Future Group with its expanse across 170 cities is trying to meet the requirements by bringing a more diverse product range of private labels to customers. “As retailers, we should add layers to the shopping experience. We work with the young as well as the old generations and we believe that it is really important to have home delivery because it can be difficult for shoppers to carry stuff back. Home delivery is a must as it enhances their overall user experience,” added Nayak.

Rounding off the intense and interactive discussion, moderator Damodar Mall noted: “Larger number of brands today want to create more choices for the customer and supermarketwalas are trying to create space to showcase those choices. Digital and Modern Retail are at the forefront of offering modernity and convenience to people who cannot travel and still want to participate and be a part of the modern retail experience. It feels like a push and pull phenomena happening at the same time. But we are driving in the same forward direction and the shoots that are now visible will accelerate faster and consumption is going to pick greater speed as we approach 2020. More of modernity and more modernization of products will happen going ahead and physical modern retail and digital modern retail will continue driving the consumption pie bigger and benefiting from it.” PG

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THE TRUTH ABOUT NUTRITION FACTS

It's widely accepted that more shoppers are looking at and understanding how to read nutritional labels; however, only half are actually purchasing product based on the Nutrition Facts panel. While shoppers are buying fewer of the less nutritional items, they're not necessarily buying more of the "good" stuff. Purchasing habits did change when they had access to calorie counts, but they simply purchased less both monetarily and in food amounts, especially in the prepared food department. Consumers are aware of calorie counts, with half saying that they consume too many calories. Progressive Grocer, along with sister company EIQ Research Solutions, interviewed 500 consumers who have household responsibility for grocery shopping to find out how they use nutritional facts in the prepared food department of the grocery store. Survey respondents were sourced via **ProdegeMR**, reinventing the research process by taking a respondent-first approach. Visit www.prodegemr.com/ensembleiq for more information.

Shopping Behavior

I purchase food based on the Nutrition Facts panel

49%



Moderation isn't enough to eat healthy

38%



I review the Nutrition Facts panel before purchasing

47%



I'll pay much more for healthy food

30%



I'm actively trying to lose weight

42%



Stores/restaurants are responsible to help me eat healthy

15%



KEY TAKEAWAYS Label checking is prevalent with only around half of shoppers, despite some thoughts that shoppers are much more in tune with the nutritional content of the foods that they're purchasing.

Daily Calorie Recommendation and Consumption Reported by Respondents

Recommended

1,793

Are confident this is correct

29%

"Just guessed"

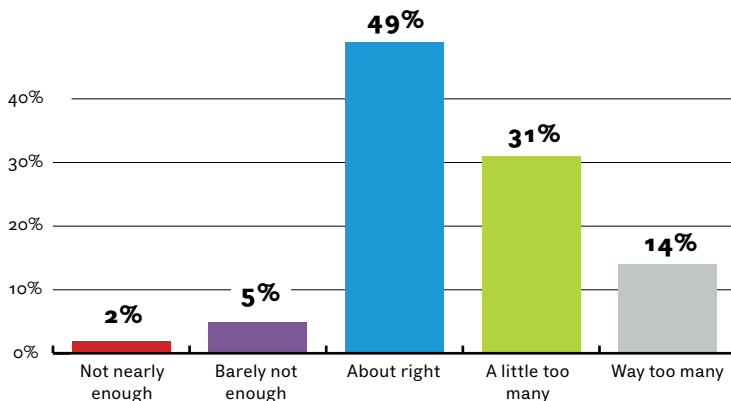
19%

Actual consumption

1,860



Perception of Actual Calorie Consumption vs. Recommended Calorie Consumption



Source: Progressive Grocer market research, 2018

KEY TAKEAWAYS Despite the fact that shoppers are consuming only slightly more calories than they perceive to be the recommendation (fewer than 4 percent more), nearly half indicate that they're consuming too many calories. This is especially prevalent among females: 17 percent indicate consuming "way too many" calories, versus 10 percent of males.



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“Our motto is ‘love all, serve all’ and our tagline is ‘largest variety of imported and Indian goods and groceries’”

Kunaal Kumar owns the Modern Bazaar store chain in Delhi-NCR. He is a passionate grocer with almost 28 years of hands-on experience running modern grocery retail outlets in some of the toniest locations in Delhi-NCR. It currently operates nine stores over a total retail area spanning 40,000 sq. ft.. Modern Bazaar stores stock about 15,000 SKUs across a product range that covers all home care products, Indian and imported food products including groceries, staples, fresh ready to eat, bakery, chocolate, in-house products of nuts, dips, sauces, and personal care products.



KUNAAL KUMAR
Modern Bazaar
Department Store

By Sanjay Kumar



“We are perhaps one of the few modern trade retailers in Delhi-NCR to be operating profitably,” says Kumar with a hint of pride at the success of his stores, and letting in sideways that he runs a business that is now 48 years in the reckoning and going strong. “I have been in this trade since I was a kid and I learned my lessons watching my father run the operations and take it forward.” He lets on that he has friends who are board members at very high-end retailers and they consult him informally about how he manages to make the business tick loud and clear.

“I believe that the sweet spot in grocery retail is to take the middle path – neither position yourself as being very high-end nor become very down-market. This way you have a catchment that is very broad and diverse and includes both the well-heeled and the better-off.” “Our stores are a reflection of this kind of positioning where a customer walks into a store with a nice lay-out and can get to pick his choice from a wide assortment of products and brands – from the basics to the upmarket – which are all priced very competitively and come with various deal offers.” “And interestingly”, he cuts in to make a brownie point, “most of the goods that the high-end retailers stock are available at our stores but none of the basic stuff that we offer can be found at their stores.”

“I have a store in Vasant Vihar, which is close to a very high-end grocery retailer. But our business volumes must be over four times what they do on a daily basis,” he says pointing to the retinue of customers entering and walking out of his store next door. They are an eclectic lot: hipsters in trendy jeans and tops to middle-aged dowagers, soccer moms and stodgy pops to even the odd firangis sauntering in and out. “I am always close to my stores and never far away from my customers,” he says matter-of-factly. “I don’t believe in giving directions sitting in an ivory tower and acting like an armchair pundit. I am usually the first to know of any important requirement or development at my stores and I deal with them upfront.”



Not that his stores don’t have trained managers and skilled staff to deal with situations. In fact, there are over 900 people working for Kumar directly or indirectly. But it’s his compulsive grocer’s itch to scratch consumer habits and behavior that keeps him in the thick of things always. “Though I have professional managers who are in-charge of all my stores, I take a keen interest in the day-to-day operations and offer them guidance in all important matters,” he says, adding that it is important for owners to keep their ears to the ground by staying in direct touch with the stores and consumers. “I also know each one of my suppliers directly and deal with them personally and not through my managers. In this line of business, the supply chain and the suppliers are very critical components and one must ensure that the system runs like a well-oiled machine,” he let out. Many decisions have to be taken on the spur of the moment and in the field, so Kumar makes it a point to visit all his nine stores every day to get a first hand brief on what is happening and what needs to be done on a priority basis.



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MODERN BAZAAR'S KEY INITIATIVES

Supply chain innovation

The chain actively manages its inventory levels at each store so as to keep the appropriate quantity of stocks to meet customer orders immediately. There is an on-going communication with business partners to ensure a smaller cycle time for replenishment of stocks as and when the demand arises. The retailer constantly assesses what kinds of products people are likely to buy given the area in which the store is operating and it ensures that appropriate stocks are maintained at all times. The key to this process is in knowing the demands of customers and the timelines of such orders.

E-commerce/ omni-channel

Modern Bazaar recently developed and implemented a mobile application for

both Android and iOS platforms, which enables customers to view products/ offers and place their orders on-line. The fulfilment of the orders is done from the store that is closest in terms of proximity to the customer location. The mobile application has been integrated with its back-end system.

Customer service

The sales teams and the supporting staff in each of the stores are focussed on providing efficient and friendly service to all our customers. Periodic training programmes are conducted on effective communication in all stores and it is mandatory for all sales staff to attend. In addition, the sales staff is constantly updated on information related to products available in the store to ensure customer queries

are attended to promptly and professionally. Customer service is taken very seriously at Modern Bazaar – from simple features such as assistance in locating products, providing product information, carrying out service, etc. – and ingrained in its staff to ensure each customer feels valued.

Mix-and-match bundling and cross-promotion

Modern Bazaar combines similar food groups and cross-sells through promotional offers, such as cheese with bread, sauces with chips. This enables it to enhance the quality of offerings to the customer, while promoting different products.

Product demos/ sampling activities

The retailer regularly carries out sampling promotions at its stores in conjunction with the respective companies/ suppliers. These promotions are done strategically in each of the stores to bring about awareness of the product leading to sample purchases and then a long-term customer. Product promotions are normally done by suppliers company employees armed with the requisite product knowledge.

Go-forward strategy with suppliers/ vendors

The strategy is of quid pro quo loyalty – the retailer helps the suppliers by promoting products and giving displays and they help in providing quality products in a timely manner.



“The maximum ‘ghapla’ in this line of business happens in the purchase and procurement transactions so I keep a hawk eye on supply orders, which ensures that business transactions are well vetted and above board.” Smart money management and store operations over the years have brought in a bouquet of dividends. From three stores till some years ago, Modern Bazaar is now pushing nine, with plans to add at least one store every year. “By god’s grace, I have never had to shut down a store in all these years of business and I will continue to open stores if I am convinced of its profitability,” he says, adding that his stores’ turnover touched Rs. 150 crore last year and the business itself is worth Rs. 500 crore now.

Progressive Grocer sat down with Kunaal Kumar to discuss his approach to retailing and the hallmarks that have made Modern Bazaar a great shopping destination in Delhi-NCR.

Which retail format do your stores come under?

Our stores are a mix of outlets selling basic and gourmet products.

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

We offer our customers personalized service within a large store offering them a unique shopping experience plus the availability of their favorite brands and fresh foods. Our marketing strategy revolves around increasing the footfall in each of the store as well as increasing our share of wallet. A key element in our marketing effort is to constantly keep on top of our product mix to meet the requirements of customers in each of our store, based on analysis of shopping trends and what the customer needs. Our motto is “love all, serve all” and our tagline is “largest variety of imported and



Indian goods and groceries". We believe in serving our customers in accordance with our motto and ethos, which is our USP.

What is your location strategy? Which locations do you prefer and what part do they play in your store sales?

Store locations are carefully chosen based on the demographics of each area. Other factors that influence the choice of a particular location are competition, cost, ease of access and visibility. Our stores are mainly located in areas that are in the midst of our target market segment and are located on main streets / high visibility areas. This has enabled us to not only reach and serve customers in the immediate vicinity but in the adjoining areas through our home delivery platform and the online application.

Which are the broad categories and range of your merchandise?

We have products in various categories, viz personal care, staples, health care products, delicacies, meats, bakery, Indian and imported groceries, processed foods and many more items.

What is the sales contribution from each of these categories?

From meats it is 15 per cent, from bakery 15 per cent, from imported goods 15 per cent as well, from fruits and vegetables 10 per cent, and from FMCG 15 per cent.

Which are the new and emerging categories and why do you think they have market potential?

The new categories are superfoods and organic foods. They have potential due to the growing awareness of healthy eating among consumers.

What is the SKU count in your stores?

At any time, we stock not less than 15,000 SKUs.

What is your strategy for merchandise display and category management?

We display the brands that we believe in the most, and the brands that do well in terms of sales.

What is the average size of your stores?

The average size is about 4,500 sq.ft., but there are larger stores as well. We have 40,000 sq.ft. of retail area under operation.

How many stores are currently in operation and where are they located?

We currently run nine stores in Delhi-NCR. These are located in Vasant Vihar, Gurgaon, New Friends Colony, Punjabi Bagh, Saket, and Greater Kailash-1 and Noida.

Who are your competitors?

Our competitors are Godrej Nature's Basket in the offline business and Grofers in the online business.

What is the average monthly turnover of your stores?

It is about Rs. 15 crore.

Please describe the customer base of your stores?

It is a large mix comprising the middle class, upper middle class, the elite, VIPs and expats.

How much have you been growing y-o-y in terms of store count?

We add an average of 1-2 stores per year. We have no franchises and no partners. It is purely organic growth.



Our stores are mainly located in areas that are in the midst of our target market segment and are located on main streets/ high visibility areas. This has enabled us to not only reach and serve customers in the immediate vicinity but in the adjoining areas through our home delivery platform and the online application.

—Kunaal Kumar,
Owner, Modern Bazaar
department

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What is the average weekly/monthly footfall at your stores?

We get about 35,000 people who visit our stores every week.

What has been the growth in same store sales?

It is 20 per cent increase per annum.

Which are your products in the private label category?

We have our private label products in categories like bakery, meats, health products, dips and staples.

Which are your top-selling PLs in food? What are your plans to augment and expand your PLs?

Dips, nuts, meats, and bread are our top selling PLs. We are looking to widen our offerings and expand our PL brands to include more products such as sauces and more variety within our existing categories.

What are you doing to promote your private labels?

We do regular in-store promotion such as posters and sampling to promote our private labels.

How much of sales turnover do they contribute?

They contribute 20 per cent to our overall sales.

What is your online retailing strategy?

We are looking to target the middle class, and spread our network throughout NCR. It will make it easier for consumers to shop for our products.

What kind of incentives and deals you offer for your online customers, a majority of whom look for better deals and discounts when buying online?

We offer a 10 per cent discount on the products.

What back-end and front-end infrastructure have you put in place for online sales?

We have a front-end website and an online portal. We already have a committee and an office in place for managing the back-end operations.

How do you plan to manage “delivery”, which is attracting critical focus these days?

About 15 per cent of our orders are already home delivery, so we do have some experience. We also guarantee 90 minute delivery as our logistics are very strong.

Do you plan to introduce mobile app as well considering that shoppers are increasingly moving to ordering products via mobile?

Yes, we will.

What are you doing to rope in more quality suppliers for the different categories of products?

We focus on giving suppliers good and long-lasting contracts, which are a sure shot way to forge loyal relationships with them.

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

We have in place a committee to check the quality of products and report on the efficiency of our suppliers. We also strictly adhere to all regulatory norms and product deadlines.

What is the extent of your direct sourcing?

We do direct imports and we directly source our organic and bakery products.

Are there specific product categories which you feel are better to tap through direct sourcing?

Organic is one such category. The quality of organic products is verified if we take the supplies directly.

Financially, which is a better approach - direct sourcing or sourcing through suppliers?

Sourcing through suppliers is a better approach.

What new steps and measures have you taken - ATL-BTL activities - to promote your stores?

We have been promoting our stores through newspaper ads, through posters, and have been promoting our products through our shops.

Dips, nuts, meats, and bread are our top selling PLs. We are looking to widen our offerings and expand our PL brands to include more products such as sauces and more variety within our existing categories.





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

Change is an ongoing process at Modern Bazaar. We are constantly innovating to ensure that we meet customer expectations both in terms of the product mix and service delivery. We have changed the format of our new store in Select Citywalk to include a café and a fresh food counter, which is a concept that we will be adopting in our future stores as well. This change has established us as a premium retail store focused on enhancing the customer shopping experience.

Which have been the successful instances that you have partnered with brands and there was a measurable favorable impact?

There have been many instances where partnering with brands has also helped us. Our collaboration with organic and health-conscious brands such as Wingreen Dips and Raw helped us to develop our organic product offering mix.

Why it is important for retailers and brands to work collaboratively?

We feel that if these two main players work together, sales can be improved and so can the service to consumers and the quality of products.

How you are using technology to enhance customer experience and improve operational excellence?

We initiated self-checkouts, with sign catch, in our Cyber Hub store in Gurgaon and we are working on making it easier and more efficient to use. We are also piloting mobile scan and pay technology with Unishop in our Select City store. The technologies not only add convenience for the customer but also cut checkout waiting time and don't require labor.

Were there any major breakthroughs, milestones, achievements in the past one year?

During the past one year, we have relocated our store in Select Citywalk to a much larger location within the same Mall. The new store is spread over 6,000 sq. ft. and has been specifically designed to enhance customer shopping experience. The store offers the customer a wide range of products across different price points. We have added a live bakery, fresh foods counter and a café that are comparable with speciality stores in developed markets overseas.

Tell us about your strengths and achievements so far?

Our strength is our committed workforce, which is passionate to serve and provide quality products. And our achievement is our satisfied clientele. Good local knowledge, efficient inventory handling and an excellent and a wide product mix are the strengths and forte of Modern Bazaar.

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

My vision is to open 15 new stores in the next 2 years and develop systems and processes to scale and enhance customer satisfaction across all our stores. **PG**



Change is an ongoing process at Modern Bazaar. We are constantly innovating to ensure that we meet customer expectations both in terms of the product mix and service delivery. We have changed the format of our new store in Select Citywalk to include a café and a fresh food counter, which is a concept that we will be adopting in our future stores as well.



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Manufacturers & Modern Trade: Joining Forces to Win over Bharat



Marketing heads of leading Indian food and grocery brands and retailers engaged in a thought leadership session moderated by Kabir Gossain, Customer Director – Modern Trade, Unilever and Kamaldeep Singh, President, Food Business, Future Group. The debate centred on the rapid expansion of modern trade in tier 2 and 3 cities, the implications for food brands (from large brands to startups) and the evolving paradigms in the relationship between modern trade and these brands as they penetrate the hinterland.

By **Virat Bahri**



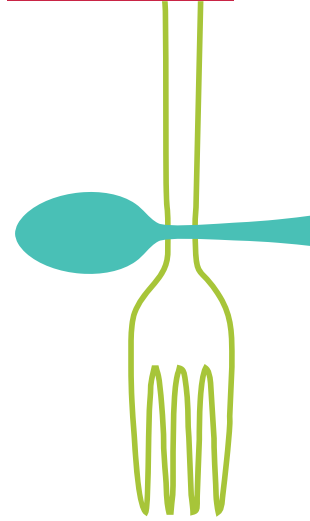
Trends indicate that the Indian retail sector is headed for an exponential phase of growth, with modern trade expanding its reach and influence to tier 2 and 3 cities to explore new potential. Growing awareness, higher disposable incomes and aspirations make these regions hotbeds of opportunity for modern retail. Moreover, real estate costs are estimated to be 30-40% lower than the cities and players with first mover advantage stand to gain.

The total Indian retail sector was estimated at around US\$ 641 billion in 2016, and projected to grow at a CAGR of 10% to reach US\$ 1.6 trillion by 2026. Modern trade, on the other hand is expected to grow at twice the rate (20%). Food and grocery garners the largest revenue share in the retail sector and accounted for 16% of the India's GDP. In 2020, food and grocery retail is expected to

account for 66% of the total revenue in the overall Indian retail sector.

Modern retail in India is expected to nearly double in size (from 2017 levels) to reach Rs 1.72 lakh crore by 2019 in the top 6 markets of India, largely driven by an omni-channel push, according to a report by the Retailers Association of India (RAI) and property consultancy firm Knight Frank India.

As modern retail in the food and grocery sector expands to tier 2 and 3 cities, certain strategic realignments become imperative for both manufacturers and retailers. New customer-centric value propositions are being developed to cater to customers in these regions across segments – high end retail, convenience stores, wholesale channels and e-commerce. Apart from this growing customisation, adequate availability and freshness of food products is a major challenge that players across the supply chain have to address collaboratively.



Even in modern trade kind of setups in small towns, stock has to be held for 20-25 days at present. That is very high considering that even in traditional retail outlets, companies like Nestle, Britannia and HUL replenish stocks twice a week. There is a long way to go to bring this period down from 25 days to seven days, which will help both entities.

Given the untapped market potential and the rapidly changing competitive dynamics in food retail, the partnership between manufacturer brands and modern trade is evolving in unprecedented ways. While this is leading to some success stories, there are still a lot of challenges to be overcome as well.

These were among the key topics covered during a panel discussion between top executives of leading retailers and manufacturing companies in India. Some of the major insights that emerged on the strategic orientations of players and transforming relationship between manufacturers and modern trade as they expand to tier 2 and 3 cities are as follows.

Alignment of supply chain

Sustained investments in the supply chain are helping organisations to partner with retailers in tier 2 and 3 towns. But manufacturers have to tune their entire supply chain to optimally and sustainably grow their business.

For starters, brands have to customise their offerings according to various formats. Shoppers going to convenience stores, grocery stores or hypermarkets have different end objectives that need to be catered to with differentiated offerings. For instance, small kirana stores keep a lot of Rs 1/2/5/10 sachets that contribute heavily to their revenue. But in hypermarkets, customers generally opt for larger sized packs.

Britannia has adapted its manufacturing to cater to the needs of the fast growing modern retail trade. The company is now adopting practices like smaller batch size production, shift by shift production, flexibility in smaller lots, smaller dispatches, differentiated packaging, etc. Daily production of a brand, for instance came down from 12 tonnes a day to 2 tonnes a day to match the needs of the market.

Supply chain has also been adapted by Britannia with the hub and spoke model. They produce the product, keep the stocks in mother warehouse and basis the demand, keep lower cover in the child warehouses. Dispatches are then done as required in the surrounding areas.

Investing in more employees in tier 2 and 3 towns also helps, as they enable the company to ascertain what could potentially sell in these places. This helps in proactive addressal of demand and better inventory management.



If we try to look into the next 5-6 years... we also see the emergence of new customer-centric propositions from all retailers – from high end retail to consumer stores to wholesale channel to e-commerce.

— **Kabir Gossain**
GM – Retail and Omnichannel, Modern Trade, Hindustan Unilever Ltd.



... we have done some work with Coca-Cola where we are lifting the entire stock from Pune and distributing across India in our stores through our own supply chain.

— **Kamaldeep Singh**
President Business- Food, Future Retail Ltd.



For organizations like us, availability and distribution is not a challenge. But with shifts that have happened ... be it in infrastructure or GST, it gives us opportunities and avenues to help build the distribution.

— **Dheeraj Arora**
VP – MT, Ecom and IB, Hindustan Unilever Ltd./HUL



Although we are a national brand, we act locally in most places. An example is West Bengal. Nationally, gulab jamun mix sells the highest. But in the east, our Bengali products like a Dhokhla mix and kachori mix do much better.

— **Sahil Gilani**
Director Sales & Marketing, Gits Food Products Pvt. Ltd.



In a lot of towns, a MT store is a destination store if we can think tangentially from assortment to let's say sampling of our products in such stores, it can provide a fantastic showcase to these customers.

— **Saurabh Makhija**
Head – Organised Trade, Nestlé India Ltd.



“
When Parle started coming in with new value-added products they began to approach us... if value added products can be added with all these FMCG companies, we have scope for all FMCG products also in our store.

— **Sunil Sanklecha**
Founder and Managing Partner, Nuts N Spices



“
All modern retailers have been demanding exclusive packs... We have had some successes like the 1 kg Parle G Gold pack. It's touching almost 50% of Parle G sales in certain stores.

— **B. Krishna Rao**
Senior Category Head – Marketing, Parle Products Pvt. Ltd.



“
We believe that the retailer is one of the influencers for our brand. We have started engaging with more than 5,000 pharmacists across Apollo Medplus. That has really helped us in driving the brand inside the store.

— **Sunil Chourasia**
Associate Director- Modern Trade, E Commerce & Institutional Sales, Abbott Healthcare Pvt. Ltd.



“
In our stores we have seen larger share of startup brands. If you look at health bar as a category, it was earlier dominated by Nature Valley and we have done a partnership with Yoga Bar.

— **Avinash Tripathi**
Associate VP, Head – Category Buying & Merchandising, Godrej Nature's Basket Ltd.

Parle G has improved its supply chain to the extent that products have to reach the shelf in 10 days at the most, especially for products like rusk with shelf life of 3-4 months. High volume products are kept ready so that they can be clubbed together and dispatched quickly.

Amitabh Singh, Business Head – Modern Trade & Enterprise Channels, Dabur India Ltd., mentioned how the company has reduced the wastage by enhancing the production of its juices. Dabur set up two new manufacturing plants

to reduce the lead time of supply. Special packs are also being developed by Dabur to cater to the requirements of the modern trade consumer.

Co-creation of value

Naveen Gupta, CMO, Bikaji Foods International Ltd. affirms that modern trade is helping the company improve penetration of some of its major product categories. He points out how snacks and savouries have moved from unorganised to organised consumption to the extent of 80-90%. But the same is not true for categories like sweets, barring exceptions like soan papdi and canned rasgulla.

Bikaji has been able to grow both depth and width of its categories thanks to modern trade. Even special packs like 1 kg savouries and 200 g soya sticks were launched specifically with modern trade in mind. Also companies like Bikaji have a clustered presence and would otherwise be sceptical of expanding to other geographies. But modern trade gives them the confidence to do so.

Similarly, when Kellogg's started launching value added products like mueslis and granolas they tapped modern retail stores in a big way to promote the product.



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“

Companies like us also effectively use the hub and spoke model. You will produce the smaller brand, keep the stocks in mother warehouse and basis the demand, with the lower cover in the child warehouses, dispatch as required...

— **Rahul Khandelwal**,
Head – Modern Trade, Britannia Industries Ltd.



“

We have realised that tier 3 cities are actually more productive and profitable for retailers. We have seen some of the smallest towns doing really well when it comes to emerging categories.

— **Vallabh Soudagar**, Sr. VP & Head- Group Business (FMCG and DBFE), Reliance Retail Ltd.



“

From the snacks and savouries perspective, unorganised to organised consumption conversion has happened to the tune of 80-90%. Modern trade has helped us in a big way in increasing our depth and width in these categories.

— **Naveen Gupta**, CMO, Bikaji Foods International Ltd.



“

Both retailers and brands work together for one common objective. They should consider co-creation...starting from designing the product lines to the brands to the packaging cues, supply chain and customer engagement.

— **Rajiv Sharma**, Business Chief (Staples) Future Value Retail Ltd./Future Group/ Food Bazaar



“

At Dabur, we have enhanced our juices production in a manner that the shelf life is also taken care of. We have appointed two new manufacturing plants in India to reduce the lead time of supply.

— **Amitabh Singh**,
Business Head – Modern Trade & Enterprise Channels, Dabur India Ltd.



India's huge cultural diversity reflects in the varied food habits of its citizens across regions. Gits has leveraged modern trade to expand its offerings across regions and even localise according to peculiar palates of each region. For instance, gulab jamun mix is the best-selling item for Gits nationally. But when they go to a market like West Bengal, products like dhokha mix and kachori mix tend to do better. In every region that they go to, manufacturers need to embrace localisation, just as a multinational food brand entering India would.

In the nutrition segment, Abbott has established categories like toddler nutrition and adult nutrition. These were tough categories to build, for which Abbott leveraged doctors as influences. But retail partnerships proved to be a major driver of sales for the company. An instance of this is the close partnership they entered into with Apollo Medplus. The company representatives spent considerable time and effort training 5,000 pharmacists across Apollo Medplus, who then became key influencers for their brand. The company is now endeavouring to bring more SKUs to the non-pharmacy segment and educate customers on the same.

Startup brands have also begun to build their fortunes due to the evolution of niche retail formats like Godrej Nature's Basket. Instances of such brands are Yoga bar in the health bar segment, Nibblebox in breakfast cereals and Epigamia in the yoghurt category.

In order to build awareness and preference, manufacturers need to showcase their products. Towards this objective, modern trade can provide a very effective platform. Moreover, in a lot of towns, a modern trade outlet is a central destination for most of the population in these places due to lack of other similar options. Showcase and sampling with smaller packs can be leveraged in modern trade outlets to drive penetration.

Collaboration beyond bare paperwork

Rajiv Sharma, Business Chief (Staples), Future Value Retail Ltd., feels that the relationship between retailers and manufacturers needs to now go beyond the transactional level. For instance, both can co-create a product line and bring in synergies in design thinking – including packaging cues, supply chain and building customer engagement.

This also extends to supply chains, which were not considered by food retailers to be part of their business till some time back. Now tie ups between manufacturers and retailers are not based on best offers alone. A key consideration is who will help you in driving your expansion plans in various geographies.

B. Krishna Rao, Senior Category Head – Marketing, Parle Products Pvt. Ltd. also believes that exclusivity has become extremely important nowadays. Modern retail is actually demanding

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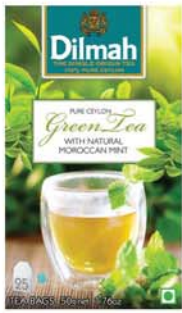
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exclusive packs for a limited period of time. One such development was the 1 kg Parle G gold pack, which the company launched on the demand of one of its retailers. It was highly successful and even touches 50% of Parle G sales in certain stores. The same is true for e-tailers like Big Basket, Grofers, Amazon and Flipkart.

Data came up as an additional area of focus during the discussion. Modern trade is generating tonnes of data on customer purchase habits. These inputs can be used by manufacturers and retailers to jointly create customer engagement programmes. There are instances when entire product lines are being co-created by manufacturers and retailers jointly. Once the idea is successful in one format, it can then be explored in other retail formats as well. However, it is important to have reasonably accurate estimations of demand in such cases before initiating the exercise.

Retailers have their ears to the ground, and FMCG companies have strong data points on consumer attributes along with consumer insight and marketing teams. The two can leverage inputs like retailer strength, shopper insights, consumer data, etc to jointly ascertain whether some category or consumption occasions (like gifting or chocolates) can be launched or even made bigger. They can also better understand factors like product display formats that would work, product bundling, promotional schemes, etc.

Vallabh Soudagar, Sr. VP & Head- Group Business (FMCG & DBFE), Reliance Retail Ltd. feels that manufacturers need to help promote retail outlets in these tier 2 and 3 cities. In his view, the belief that shoppers are mode evolved in tier 1 and 2 is a myth. In fact some of the emerging retail categories are seeing very good traction in small towns and cities. Customers are coming up with



varied shopping lists that have pleasantly surprised retailers in these regions. But Vallabh also wants manufacturer brands to spend more time in retail stores to actually understand how the retailers are adding value to their products.

Dheeraj Arora, VP – MT, Ecom and IB, HUL, sums it up to say that there are three broad spaces where manufacturers and retailers will collaborate more and more in the coming years. The first is with respect to their respective strengths. Manufacturer brands have insights on consumer behaviour while retailers have inputs on shopper behaviour. They can merge their insights to win together. Reliance Retail has also found the productivity of partnerships in some tier 2 and 3 cities to be much higher than some of the metros.

The second area is with respect to driving partnerships to improve efficiencies. These will be in terms of end-to-end tie ups from planning to production to distribution. The end result has to be to give the customer the best option in terms of price, freshness, desired pack sizes, variety, etc.

The third big shift will be in terms of the channel evolution across online and offline mediums. These lines have been blurring over time, and both manufacturers and retailers have to look at ways to win together in this changing paradigm.

One thing is certain from the discussions during this session. While the opportunity that the tier 2 and 3 cities present is huge, tapping into this opportunity will require a radically different approach as compared to tier 1 cities. And to succeed in this new and largely untested battleground, manufacturers and modern retail will have to synergise their strengths much more than ever before. **PG**

While the opportunity that the tier 2 and 3 cities present is huge, tapping into this opportunity will require a radically different approach as compared to tier 1 cities.



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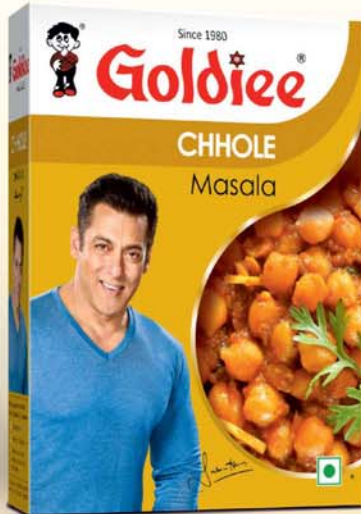
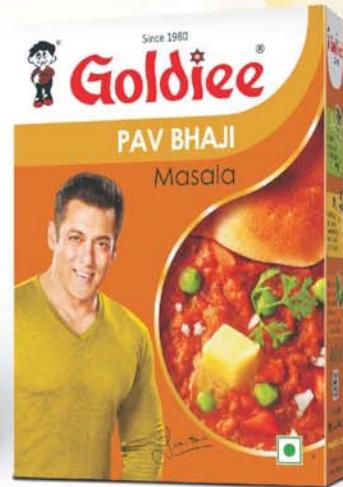
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The Spice Route Journey: Market & Trends

As taste buds are growing bolder, consumers across the country are becoming more adventurous and willing to try new, exotic, flavor profiles. Retailers are seeing a strong customer demand for gourmet, international, and ethnic spice blends as customers become more aware of ethnic and foreign cuisines. On their part, suppliers of spices are working with retailers to promote sales, but most agree that the important tactics are cross-promotion and sampling. On their part, retailers should try their best to cross-merchandise within the store between departments and provide food demos with support from suppliers.

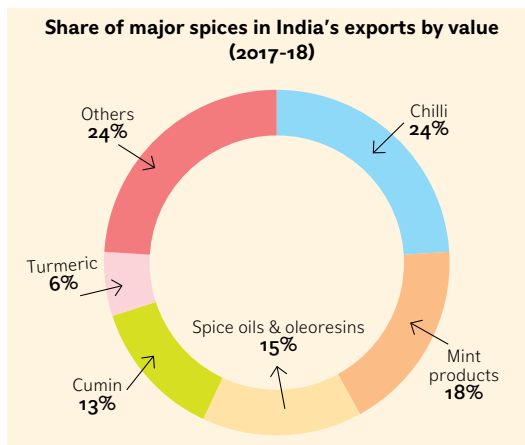
By **Sanjay Kumar**

Spices are an integral component of virtually all recipes in all cultures, not only for their flavor and seasoning but also for their numerous medicinal values. India produces a wide variety of spices including cardamoms, chillies, black pepper, mustard, coriander. Indian cuisine is also known for its rich taste, which it derives from numerous spices.

India, known as the home of spices, boasts a long history of trading with the ancient civilizations of Rome and China. Today, Indian spices are the most sought-after globally, given their exquisite aroma, texture, taste and medicinal value. Indian spices have a rich legacy and they have been in great demand since the 12th century. Even before the Christian era, the Greek merchants flooded the markets of south India to buy spices, which were considered a luxury item. The Indian spices were the main lure for crusaders during their expeditions to the country. After Vasco da Gama successfully discovered the route to India via the Cape of Good Hope in 1498, a Portuguese expedition brought the first Indian spices to Europe from India through the Cape of Good Hope in 1501.

Traditionally, spices in India have been grown in small land holdings, with organic farming gaining prominence in recent times. About 98 per cent of the spice production in India is by small-scale farmers, who typically farm less than two hectare and seasonally rotate the growing of spices alongside other crops. Still, India is the world's largest producer, consumer and exporter of spices; the country produces about 75 of the 109 varieties listed by the International Organization for Standardization (ISO) and accounts for half of the global trading in spices. Top spices produced in the country include pepper, cardamom, chilli, ginger, turmeric, coriander, cumin, celery, fennel, fenugreek, ajwain, dill seed, garlic, tamarind, clove, and nutmeg among others.

Spice exports from India have been consistently moving up during the last decade. The Spices Board under the Ministry of Commerce has the mandate



for the export of spices from the country. Spices account for about 16% in quantity and 19% in value of the total horticultural exports from India. India's share of the world spices trade is estimated at 40-50% by volume and 25% by value. The spice export basket consists of whole spices, organic, spice mixes, spice blends, freeze dried, curry powders/mixtures, oleoresins, extracts, essential oils, de-hydrated, spice in brine and other value added products.

During 2017-18, India exported 1,028,060 tons of spices and spice products, which were valued at around Rs 17,929.55 crore (US\$ 2,781.46 million). Exports grew by 8% in terms of volume and 6% in terms of value (US dollars). In terms of targeted exports, the actual achievement is 100% in terms of volume and 105% in dollar terms of value. USA is the top export destination for Indian spices followed by Vietnam, China, UAE and Malaysia. Chilli is India's top spice export by value followed by mint products, spice oils & oleoresins, cumin and turmeric.

India is also the largest domestic market of spices in the world. More than 90 per cent of the spices produced in the country is used for domestic consumption and the rest exported as raw as well as value added products. In terms of production volume, chilli, garlic, ginger and turmeric constitute of 75% of the total spice production. Andhra

About 98 per cent of the spice production in India is by small-scale farmers, who typically farm less than two hectare and seasonally rotate the growing of spices alongside other crops. Still, India is the world's largest producer, consumer and exporter of spices; the country produces about 75 of the 109 varieties listed by the International Organization for Standardization (ISO) and accounts for half of the global trading in spices.





Over the years, spices are gaining its importance in Indian food basket. This is reflected from their increasing food share from 3.65 per cent to 4.40 per cent, and increasing per capita annual consumption from 2.88 kg to 3.25 kg during 1993-94 to 2011-12. Interestingly, north-east and eastern regions, where spices consumption is less, have witnessed maximum increase during the period under consideration.

Pradesh ranks at the top in chilli production followed by Telangana and Madhya Pradesh. In case of garlic, India is the second largest producer after China. Madhya Pradesh, Rajasthan and Gujarat are the top garlic producing states in the country. Ginger production in India is carried out in as many as thirteen states, with Assam, West Bengal and Karnataka ranked the top producers in 2016-17. The two most popular varieties of Indian ginger are the Cochin ginger and Calicut ginger. It is mostly traded in fresh, ground, oil and in oleoresin form.

The Indian spices market is worth INR 40,000 crore annually. The market is largely unorganized and the branded segment makes up about 15%. The branded market is dominated by players such as MDH, Suhana, Paras Spices, Prakash Spices, Goldiee, KinJin, Nimbark Organic, MTR, Badshaah, Catch, Everest, JK Masale, Ramdev, Eastern, Priya, Mother's Recipe, etc. ITC and Tata Chemicals have also launched their spices brands under MasterChef and Tata Sampann Spices respectively.

SPICES CONSUMPTION BASKET

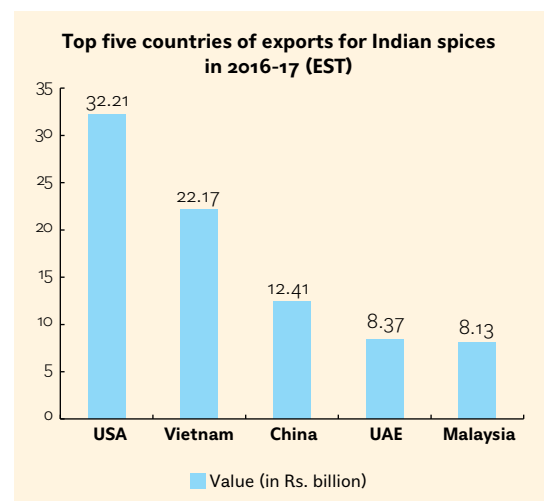
Spices are used for different religious ceremonies and in medicines, apart from cooking in India. Spices are the most rapidly growing category in food and demand for spices with high quality, safely packaged and containing natural colors is expanding robustly. According to National Sample Survey (NSS) data, an average Indian consumes 3.25 kg spices in a year which constitutes 4.40 per cent share in total food expenditure. Due to varying food habits of Indian households, consumption pattern of spices varies significantly across geographical regions of the country. The share of spices in total food expenditure varied from 3.21 per cent in north-east region to 5.34 per cent in southern region. In quantity terms, spices consumption varied from 2.15 kg in north-east region to 4.92 kg in southern region in 2011-12.

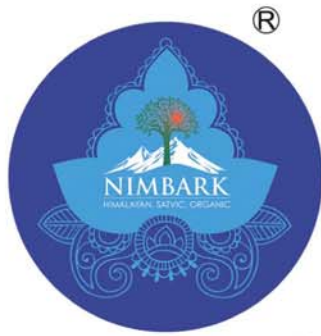
Over the years, spices are gaining its importance in Indian food basket. This is reflected from their increasing food share from 3.65 per cent to 4.40 per cent, and increasing per capita annual consumption from 2.88 kg to 3.25 kg during 1993-94 to 2011-12. Interestingly, north-east and eastern regions, where spices consumption is less, have witnessed maximum increase during the period under consideration.

In India, spices are consumed as whole spice or mixed spices. According to NSS data, mixed spices constitute 39 per cent of total spices budget of Indian households. Among whole spices, dry chilli occupies a predominant share of 18 per cent share in total spices expenditure. Dry chilli is followed by turmeric, garlic, ginger, tamarind and black pepper with their respective share of 15 per cent, 12 per cent, 7 per cent, 5 per cent and 4 per cent.

Due to changing food habits, and taste and preferences of Indian households, the relative importance of spices is changing over the years. Between 1993-94 and 2011-12, the share of dry chilli in spices budget has reduced by 6 percentage points. Similarly, tamarind has lost its share by 2 percentage points during the same period. On the other hand, the share of garlic, ginger and turmeric has increased. Further, Indian households are increasing their spending towards mixed spices as shown by its increasing share over time. The rising importance of mixed spices is consistent with peoples' inclination towards ready-to-cook, ready-to-eat and processed food products. This offers a great scope to tap the rising market of value-added spices products by improving the processing infrastructure and services in spices sector.

An average Indian consumes 543 gram dry chilli in a year. Among the regions, the consumption of dry chilli varies widely from 165 gram in the north-east region to 926 gram in the southern region. Between 1993-94 and 2011-12, the per capita





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→ MARKET SEGMENTATION OF SPICES

Whole spices are normally dried version of fruit, flower or bark of the tree. Cloves, cinnamon and cardamom are mostly used as whole spice for preparation of food and beverages. Whole spices are used by the retail consumers who are engaged in cooking food at home. One of the major reasons for demand of the whole spices is the low level of adulteration as it is harder to adulterate the whole spice.

Ground spices are whole spices that can also be grounded into powder and mixed with other spices before being used in any recipe. Ground spices are easy to cook as it takes less time to flavor the food.

Blended spices are those that have been blended based on the cuisine and recipe. This is one of the emerging categories in the spices market segment for ground spices. Due to exposure of consumers to different culture and cuisines, blended spices offer a ready to cook solution for households aspiring to prepare these cuisines.

Seasonings are spice mixes used to improve the flavor of food items and is a growing market.

Oleoresins and essential oils are extracted from spices through steam distillation, solvent extraction and super critical fluid extraction process. Oleoresins are mostly preferred for their microbiological advantages, uniformity in flavor and aroma, ease of storage and transport. Distillers often compete with traders to get better quality of whole spices for extracting the essential oil and oleoresins. Oleoresins combine essential oils with non-volatile elements of spice provide flavor profiles characteristic of the ground spice or herb with a more rapid flavor release in a concentrated, oil-soluble, liquid form.

Nutraceuticals are seeing a growing use of spices extracts. Though a new market, Indian nutraceuticals market is valued at USD 2.8 billion and growing. For example, digestive supplement uses ginger extracts as an ingredient.



consumption of dry chilli declined from 769 gram to 543 gram and the highest reduction was noticed in the southern region. This indicates that the preferences of Indian households are moving away from dry chilli across all the geographical regions.

The average per capita annual consumption of turmeric in India is 343 gram. Among the regions, turmeric consumption is highest in the eastern region and lowest in the southern region. The past 18 years have witnessed marginal reduction in turmeric consumption. But, the decline in turmeric consumption is taking place in north, west and north-east regions only. The south Indian households are increasing their turmeric consumption over the years. The eastern region has witnessed no change in turmeric consumption over the years.

The average per annual capita consumption of garlic is 586 gram, varying from 466 gram in the eastern region to 702 gram in the southern region of the country. During the past 18 years, garlic consumption has increased 45 per cent. The increase in garlic consumption is observed across all the geographical regions indicating increasing consumer preference towards garlic.

Among all the whole spices, ginger has witnessed highest increase in its consumption. The per capita annual consumption of ginger has increased from 206 gram in 1993-94 to 460 grams in 2011-12. Among the regions, ginger consumption is highest in the north-eastern region of the country.

In India, tamarind is primarily consumed in the southern region. The per capita annual consumption of tamarind in the southern region is 1014 gram, which is four times higher than the average consumption in the country. Over the years, consumer preference is moving away from tamarind leading to decline in per capita tamarind consumption.

An average Indian consumes about 52 gram of black pepper in a year. Among the regions, consumption of black pepper varies from 18 gram in north-eastern region to 99 gram in the southern region. During the past 18 years, black pepper consumption has increased in all the regions except in north. The north Indian households have significantly reduced consumption of black pepper over the years. Overall, the study reveals increasing consumption and changing composition of spices in Indian diet over the years. The consumer preference is changing away from dry chilli, tamarind, turmeric and towards ginger, garlic and mixed spices. An increase in the consumption of mixed spices shows a rising domestic market of value-added spices products in the country. But these changes in consumer preferences are not uniform across geographical regions, which necessitate devising region-specific marketing strategies to meet the household demand of spices in the country.

MARKET SIZE AND GROWTH DRIVERS

Spices category is another growth leader in the food industry and has grown at a CAGR of 13 per cent over the last decade. By 2020, the market is likely to grow twice as big as its present size with the same growth rate. About Rs. 6,000 crore is estimated to be the branded market in spices. India is estimated to consume over 5 million tonnes of spices annually. This consumption is almost 90 per cent of all spices produced in the country. Ginger- garlic, dry chillies and turmeric together contribute 44 per cent to 48 per cent of total spices in India. This consumption share is not much varied in rural and urban markets.

Of the \$18 billion international spices market by 2020, the share of India will be around \$5 billion. The Indian spices sector growth is expected to be led by branded spices and spice mixes. As the largest producer and exporter of spices, India has immense growth potential. Technological advancements and research and development allow Indian spice exporters to offer high grade products to consumers globally.

The Indian government is aggressively promoting spice exports through various initiatives such as setting up of spice parks. Spice Parks offer common processing facilities to both producers and exporters. Changes in eating habits and in the lifestyle of consumers across the globe have fuelled the demand for healthy food products. This trend has significantly highlighted the use of natural flavors, the majority of which come from spices.

As per the figures of Spices Board of India and APEDA, the total export value of spices from India in 2017-18 stood at US\$ 3.11 billion with 1.08 billion kg of total spices export. The top 10 importers of Indian spices between Apr.-Oct. 2018 were the US, China, Vietnam, Hong Kong, Bangladesh, Thailand, UK, UAE, Malaysia and Sri Lanka. During 2017-18, the top 10 exported spices and spice products in terms of value were chilli, mint products, spice oils & oleoresins, cumin, turmeric, pepper, curry powders/paste, cardamom seeds, and other spices like tamarind, asafoetida, cassia and garlic.



Adventurous shoppers are keeping sales of spices and seasonings on an upward track. Discovery, Exhilaration, Satisfaction: Shoppers are finding these sensations and others at their local supermarkets, and apparently, they need not look farther than the spice aisle. Exciting pops of spicy, sour, herbal and sweet flavors surprise the senses and bring new energy to dining and as consumers' love affair with spicy flavors evolves, onetime fans of ground or crushed red pepper are discovering the smoky heat of chipotle and the richness of ancho chili pepper, or the pungent wasabi and the bite of ginger.

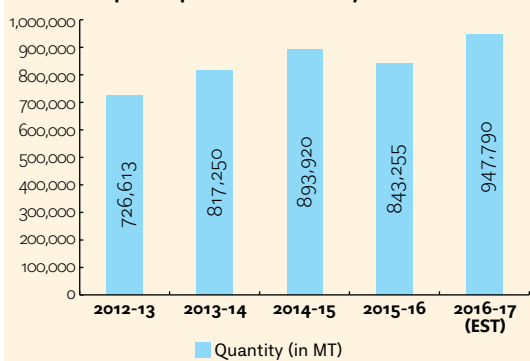
The overall spices/seasoning/extract category, as defined by Nielsen, has grown steadily over the past five years. With more folks looking to jazz up their everyday meals along with the rise in the 'eating in' trend, growth in the spice and seasonings market is also being driven by a growing interest in gourmet cooking and ethnic cuisines, which often requires an investment in new varieties of seasonings, according to market researcher Mintel.

And most of those shoppers are buying their spices from supermarkets, which are the leading channel for spices and especially seasoning sales. According to Mintel reports, food stores are expanding their selection of private label seasonings and adding bulk seasoning sections to deliver greater value to customers and better compete with mass merchandisers and traditional stores. Among the top sellers at leading supermarkets are cayenne pepper, turmeric, curry powder, saffron, and organic basil, oregano and garlic. These and others contribute to a variety of enticing home-cooked recipes from a world of cuisine made with delicious, all-natural, non-irradiated herbs and spices.

Analysts say that sales growth of spices and seasonings category will continue to show an uptick and growth will be faster in gourmet, organic and natural spices and seasonings. Dry seasonings are expected to perform well and sales of salt substitutes will rise amid the ongoing attack on sodium. Growing consumer awareness of spices' health

The consumer preference is changing away from dry chilli, tamarind, turmeric and towards ginger, garlic and mixed spices. But these changes in consumer preferences are not uniform across geographical regions, which necessitate devising region-specific marketing strategies to meet the household demand of spices in the country.

Spice exports from India by volume



Now that Sriracha is almost as common as ketchup and salsa, spice addicts need their next big hit, and many experts point to the rising trend for spice mixes. Restaurant consultants believe that foodies are demanding ever-increasing levels of spice in their dishes, pointing to the rising use of cayenne pepper, caraway, horseradish, turmeric, cardamom, cumin, coriander, thyme, mint and other trending spices.

benefits is acting as a good growth trigger with people looking for believable, approachable and achievable health and wellness and preferring spices and herbs that add flavor and antioxidants to food to help improve diets without adding salt, fat or sugar.

Wellness is not only being tied to what spices and seasonings don't have, but also to what they do contain. That explains why organic spices like turmeric and curry are hot sellers not only because of they are being increasingly featured on the food channels but also because of the increasing body of research that is being published about the health properties associated with these products. As the general public today is better informed, they are looking for clean, organic ingredients to help them look, feel and live better.

Consumers also are trying to find a balance of good taste, economical use and simplicity. Mealtime has to be fast and efficient. People just don't have time, or don't know how to cook anymore. To address this, manufacturers are developing new seasoning and spice blends that provide consumers with healthy alternatives for cooking their favorite cuisine without having to buy additional or different spices to achieve the desired authentic flavor of cuisines. And though consumer surveys indicate that shoppers can see through the difference between brands, and are willing to pay more for premium quality, analysts warn that spices and seasonings companies should continue to offer products that are low-priced and value-positioned.

Growth of the spice market in India has been triggered by the establishment of quality



evaluation laboratories that ensure the quality of the final product and make them world renowned. These labs stay in direct touch with the importers association of importing countries. Other factors contributing to the growth of the spices market is the infrastructural facilities provided by the Spices Board of India, and the shifting consumer interest from artificial to natural flavors. However, the market still faces a number of challenges in the form of food safety issues, and insufficiency of legal provisions, among others.

INCREASING USAGE OF SPICES IN THE NON-FOOD APPLICATIONS

Spices take an important place in common man's every life mainly because of its flavor, taste and medicinal values. In recent years, changing food habits and changing lifestyle have fuelled the need for processed products across the globe. Spices usage is growing with the increased use of processed products. With continued emphasis on quality and food safety, Indian spices industry has a great future in the coming years. Export of Indian spices and spice

→ SPICE TRENDS TO WATCH OUT FOR

Retailers and manufacturers keep looking ahead to the latest in food and beverage trends in an effort to best accommodate consumers' ever-changing tastes and preferences. Here are some key trends that flavor experts have identified, which will take top billing on consumers' shopping lists in the days ahead. Among the trends set to shape the future of flavor are bolder, more intense flavor experiences, as well as adventurous global tastes. Pantry staples also are poised to take on a more central role in the kitchen, such as the use of smoking spices and herbs, and pairing sours with coarse salt.

Rounding out the top flavors are:

Global Blends On the Move
– Japanese 7 Spice (Shichimi

Togarashi) offers a new kind of spicy heat, while Shawarma Spice Blend lends warm, spiced flavor to grilled meats and more.

Middle Eastern Mezze – These distinctive dips and spreads, packed with zesty herbs and seasonings, offer an approachable and delicious introduction to a vibrant global cuisine.

Sour + Salt – Combining coarse salt with surprising sours like pickled ginger, sour cherry, dried mango and lemon zest results in a lively finishing flavor that lends brightness and texture to dishes.

Smoked Spices – Smoking spices and herbs deepens their flavor and aroma, adding richness to meals and drinks.

Umami Veggies – For a fresh way to savor the tempting “fifth

taste,” look no further than naturally umami-rich veggies like mushrooms, tomatoes, sweet potatoes and nori.

Liquid Revolution – Fresh purees and juices blend with bold spices and herbs to intensify sauces, pasta, dressings and more - providing a fun, delicious way to enjoy an extra serving of fruits and veggies.

Flavor Worth the Wait – Lift the lid to discover the rich flavors from recipes around the world that meld aromatic spices and comforting ingredients into mouthwatering slow-cooked meals.

Cookies Reimagined – Classic spiced cookie flavors take new form in decadent, imaginative desserts that redefine “milk and cookies.”

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Indian households are increasing their spending towards mixed spices as shown by its increasing share over time. The rising importance of mixed spices is consistent with peoples' inclination towards ready-to-cook, ready-to-eat and processed food products. This offers a great scope to tap the rising market of value added spices products by improving the processing infrastructure and services in spices sector.



products is increasing at a rate of 10% in terms of volume and 17% in terms of value. Growth in Indian spices and spices products exports clearly show that Indian spices and spice products have a great demand in the international markets. Usage of spices in the non-food applications such as dyeing, nutraceutical applications is also increasing. Like-wise, the demand for dehydrated spices is also increasing in both India as well as in rest of the world. Currently, India consumes around 20,000-30,000 tonnes of dehydrated spices. Experts anticipate a growth of 10-12% a year in the next 5-10 years.

Spices, the predominant flavoring, coloring and aromatic agents in foods and beverages, are now gaining importance for their diversified uses. The nutritional, anti-oxidant, anti-microbial and medicinal properties of spices have far-reaching implications. In the current scenario, the anti-diabetic, anti-hyper cholesterolemic, anti-carcinogenic, anti-inflammatory effects of spices have paramount importance, as the key health issues of mankind nowadays are diabetes, cardio-vascular diseases, arthritis and cancer. Spices or their active principles could be used as possible ameliorative or preventive agents for these health disorders.

Extensive studies on animal models carried out indicate that spices could be consumed at higher dietary levels without any adverse effects on growth, organ weights, and food efficiency ratio and blood constituents. Curcumin, the coloring pigment present in turmeric, capsaicin, the pungent principle in red pepper, allicin, the active principle in garlic, gingerol, the pungent principle in ginger, saponin and fiber present in fenugreek are immensely valuable in health care with their multiple physiological effects. India is the land of spices and could exploit the fast growing nutraceutical sector with her high intrinsic quality spices. The scope of spices like turmeric, ginger, fenugreek, garlic and red pepper in the nutraceutical industry with their possible role in the control/prevention of important health disorders, is on the rise.



Non-traditional use of spices including nutraceuticals now accounts for nearly 15% of spice production in the country. The new lines of applications are growing at a rate of 10-12%, according to Spices Board officials. Nutraceutical and life sciences companies and R&D Labs are beginning to tap the healing, nutritive and health benefits of spices. This segment has opened out various possibilities of using spices to create fortified foods and organic medicine.

EMERGING CONSUMER TRENDS IN SPICES

Spices have become a truly global category as manufacturers and retailers take inspiration from the flavors of many cultures. Trends in the spice and seasoning category closely follow flavor forecasts, which pinpoint the top trends and flavors that are driving a spirit of discovery around the world — from cuisines on the verge of widespread appeal to ingredients with the potential to alter the culinary landscape several years from now. People around the globe, including Indians approach eating with greater curiosity than ever before and really celebrate the enjoyment of it as discovering new flavors from around the world is a big part of cuisine curiosity today. The taste buds are growing bolder as consumers across the country are becoming more adventurous in their own kitchens. Retailers are seeing a strong customer demand for gourmet, international, and ethnic spice blends as customers become more aware of ethnic and foreign cuisines, in addition to being more willing to try new, and in some cases exotic, flavor profiles as a result of food media exposure.

Bold flavors and variety

In fact, bold is big, and so is variety in flavors. This increased interest in seasonings and spices also plays into two other major developments that affect most consumers these days: the need to eat healthier and save time in the process. As people are getting more adventurous, they are



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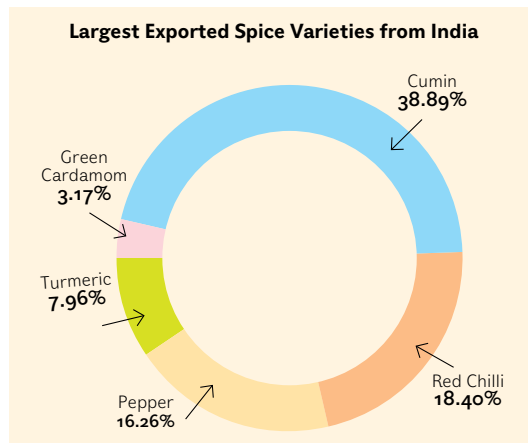


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buying more spices, and trends are getting bolder and stronger, particularly at the higher-quality end. For example, cumin, used popularly in many types of seasoning has today risen to become one of the top popular spices. “Spice sales in general have been strong and growing over the past year, with many new flavor line extensions coming to market as customers continue to demand unique flavors that allow them to explore new taste and cooking experiences,” says Mohit Arora, Director, Kipps Mart, a gourmet food and grocery store in Ludhiana known for its imported range. “The spices that seem to be in the highest demand are gourmet spices and international/ethnic blends such as curry and specialty herbs,” he adds, noting that herbs and spices make life better and they create emotion like nothing else you can put into food.

Among the taste experiences that are gaining an international following is barbecue with a global twist — think of lemon as the ultimate refresher; clear, unpretentious flavor combinations such as ginger with coconut or vanilla with butter; and trading in salt and fat for spices and herbs vibrant enough perk up a dish on their own. Among new products, which represent a veritable United Nations of flavors, are line extensions of Perfect Pinch Salt-free Seasonings, including Southwest Sweet ‘n Smoky; Gourmet Collection Blends in



Cuban, Moroccan, Tuscan and Southwest varieties; and Perfect Pinch Bread Dipping Seasonings in Sicilian Crushed Red Pepper & Garlic and Tuscan Rosemary & Sun-Dried Tomato varieties, as well as the introduction in bilingual packaging of five SKUs of authentic Mexican seasoning mixes.

The growing consumer interest in a world of flavors has been noted at the retail level, too. Customers really love their local spices and seasonings, but they’re also very adventurous eaters and like new, kicked-up versions of local favorites, and more restaurant-quality ingredients with a lot

→ INNOVATION IN SPICES

Taking regional flavors global and localization of global flavors: As the spices powder segment category is getting mature, Indian players are innovating with new hyper localized spice mix categories to make regional leader from the local preferences in taste. ITC launched specialty spices under ITC MasterChef brand to bring alive the localized flavors. For Telengana/AP market, the company has launched Rayala Miriyala Chaaru Powder, Guntur Kooru Karam, Konaseema Kodi Kooru Masala, Madurai Shambar Powder, Shahi Garam Masala. For Tamil Nadu, Chettinad Chicken, Madras Milagu Rasam, Thanjavur Sambar Powder, Madurai Kulambu Milakai have been launched. These local flavors can be further capitalized once they develop into brands and expanded nationally.

Alternatively, the localization of global spices flavors can be introduced to suit the Indian taste buds like Capital Foods Ltd. through its brand Ching’s Secret has launched a range of spice mix for Chinese dishes. There is a tremendous opportunity for exploring these innovative emerging segments with R&D, consumer survey and picking right flavor to bring such tastes for Indian consumers.

Ready to eat (RTE) or ready to cook (RTC) recipes: The Indian food industry is changing rapidly due to the changing demographics of the Indian consumer led by the increasing number of nuclear families, rising affluence of the middle class and a larger number of working women. This has led to high growth of RTE/RTC category in India recently and is expected to grow by

19-21% CAGR over 2016-17 to 2018-19. The RTC sub-segment includes instant noodles, instant pasta, and breakfast mixes and soups, whereas the RTE sub-segment comprises ‘just heat and eat’ Indian delicacies such as curries, dals and rice as well as sauces, pickles and spreads. The RTE segment also includes frozen foods like fries, aloo patties, chicken patties and chicken nuggets. Indian spices majors have launched their RTE/RTC based products targeting working women and students away from home. Product innovation and introduction of new products are expected to further support growth in this segment.

The snack segments in India, estimated at Rs. 445 billion as of 2016-17, is expected to grow at a rapid pace of 14-15% over the next five years. The spice industry can

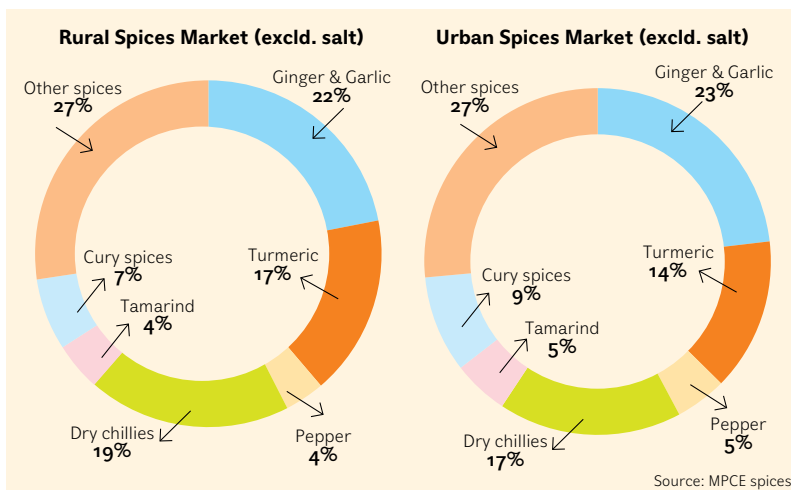
tap this segment as a natural extension of their product line for driving future growth.

Spices blend in dairy industry: Spices based dairy products are a recent trend where spices are used as flavoring agents viz. cheese, butter, ice cream, buttermilk products, curd, paneer, cream cheese, yogurt, and others. Value added dairy products like paneer, butter, buttermilk, yoghurt, condensed milk and cheese, etc, are finding growing acceptance in India and Indian dairy companies are experimenting with various flavors in these categories. The creamy dairy base is complemented with spicy flavors suiting to the Indian taste. Spices such as garlic, chilly, pepper and others coupled with improvements in the dairy production process is expected to contribute towards the growth of this market.

of specialty and international spices. Kosher salt and sea salt are becoming increasingly more popular, and trends like grind-your-own salt, peppercorns and seasonings are finding avid takers. With more rubs and blends being introduced into the market, people are really customizing what they are using, and there's a definite trend toward fresh seasonings. Retailers aver that there is a growing demand for spicy dry and liquid rubs and other seasoning blends that can help busy home cooks imitate the recipes they enjoy in restaurants or see created by famous chefs on television. It offers an opportunity for retailers to cross-merchandise these spices with their meat, poultry and fish counters for increased sales and volume movements.

The rise of natural, organic, exotic

As an increasing number of consumers want all-natural products, these types of spices and seasonings are growing in popularity. When comparing similar spices side by side, consumers really can taste the difference between spices sourced with taste and quality in mind. Organic spices are grown and processed without the use of toxic pesticides, irradiation or genetically engineered products and they contain no sugar, sodium, artificial ingredients, fillers or preservatives. Specialty operators such as natural and organic food retailers are experiencing this trend and witnessing an increasing demand for organic and ethnic spice and seasonings. "People are looking for these products and we are definitely very pleased to carry it as the demand is there," says Sunil Sanklecha, Managing Partner of Chennai-based specialty store Nuts 'n' Spices, which offers a range of herbs



and seasonings such as oregano, basil, thyme, parsley, mixed herbs, etc, apart from a variety of spice powders and condiments like Kashmir chilli powder, coriander seeds powder, cardamom, clove, cinnamon, nutmeg, among others.

The growth of prepackaged seasoning blends and rubs today is largely a response to the interest in bolder taste, as well as the busy lives of most urban consumers. As such, more stores all the time are coping with the conflicts between having good food and dealing with a busy lifestyle. In this scenario, stores that offer spice and seasonings that can help even busy people pull off great dishes in their own kitchens, veritably offer an added pleasure to consumers. Consumers are also trying to reduce their salt or fat intake but they often find that in taking the fat and the carbs out, the flavor

Table 2: India Spices exports from 2001-02 to 2015-16

Year	Quantity	Value	$\hat{y}(V) = (-4082.99 + 0.021382(Q))$	Actual Q	Expected Q	Residuals		
2001-02	235916	1833.53	961.37	2001-02	1833.53	961.3659	872.1641	
2002-03	243203	1940.55	1117.18	2002-03	1940.55	1117.177	823.3735	
2003-04	264106	2086.71	1564.12	2003-03	2086.71	1564.124	522.5855	
2004-05	254382	1911.6	1356.21	2004-05	1911.6	1356.206	555.3941	
2005-06	348524	2350.52	3369.15	2005-06	2350.52	3369.15	-1018.63	
2006-07	350363	2627.63	3408.47	2006-07	2627.63	3408.472	-780.842	
2007-08	373750	3575.75	3908.53	2007-08	3575.75	3908.533	-332.783	
2008-09	444250	4435.5	5415.96	2008-09	4435.5	5415.964	-980.464	
2009-10	470520	5300.26	5977.67	2009-10	5300.26	5977.669	-677.409	
2010-11	502750	5560.5	6666.81	2010-11	5560.5	6666.811	-1106.31	min
2011-12	525749	6840.7	7158.58	2011-12	6840.7	7158.575	-317.875	
2012-13	575270	9783.42	8217.43	2012-13	9783.42	8217.433	1565.987	max
2013-14	726613	12112.76	11453.45	2013-14	12112.76	11453.45	659.3108	
2014-15	817250	13735.39	13391.45	2014-15	13735.39	13391.45	343.9405	
2015-16	893920	14899.68	15030.81	2015-16	14899.68	15030.81	-131.127	

SOURCE: SPICES BOARD COCHIN, 2016



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— **Dharmil D Thacker**
Managing Partner,
Januz Universal

Tell us about your company and its line of business.

Januz Universal is a Merchant Export firm of which I am the Managing Partner. I have over 30 years of experience in exports of spices and food products. At Januz Universal, we understand the ever growing needs of the universal consumers in the global market. We specialize in procuring good quality products sourced from across the Indian sub-continent and are exporting to more than 30 countries across the globe. We also specialize in sourcing new products for our valuable clientele. For the clients who wish to get products in their brand, we coordinate with the manufacturers for private label and ship products to the clients in their respective brands. We also have the expertise to handle bulk consignments and assure timely shipping and delivery. Consolidating shipments is our core expertise, which helps our clients to get fresh stocks as and when required and also liquidate stocks quickly, rather than importing one full container at a go and losing shelf life of products.

Which spices from the subcontinent are in demand?

The products in demand are majorly chilli, pepper, cumin, turmeric, cardamom, dried ginger, coriander, fennel seed, fenugreek, tamarind, nutmeg, and mace. These are exported in bulk and pre-packed to various countries from India. These spices are consumed not only by the Indian population scattered across the globe but is also widely used in international cuisines, thereby creating a good demand for spices in the international market. Apart from whole spices, blended and powdered spices are also exported in good volumes. We export several brands of spices and other foodstuff products to our clients.

Which are your key markets?

We are majorly exporting to the USA, the UK, Canada, European countries, African countries, Thailand, the Far East and the GCC countries.

What issues you would like to highlight for importers?

Indian spices for exports are subjected to mandatory tests that are required by the importing countries and we, as exporters, comply with the formalities of the relevant bodies who are responsible for conducting the tests and certifying the products. By importing goods that are tested and certified, the importers do not face any difficulties in clearance of goods at their respective ports.

largely dependent on the ready-to-cook spice mixes that are now being made available by many brands. The RTC mixes are being developed keeping in mind the palate of global consumers and their respective cuisines. There are many established players in this category and many budding brands also that have the entire gamut in their product basket.

Which are the major operational challenges that you face in terms of logistics or any other challenges that you would like to mention?

As such operational challenges are prevalent in any business. However, when certain systems and procedures laid down upon



What have been your significant learnings?

As an exporter, we need to keep ourselves updated on the rules and regulations of the importing countries pertaining to spices and any other food products. Also, we need to get updated on the changing tastes and preferences of global consumers, which is very important as this is a major factor on which the exports of products are largely dependent.

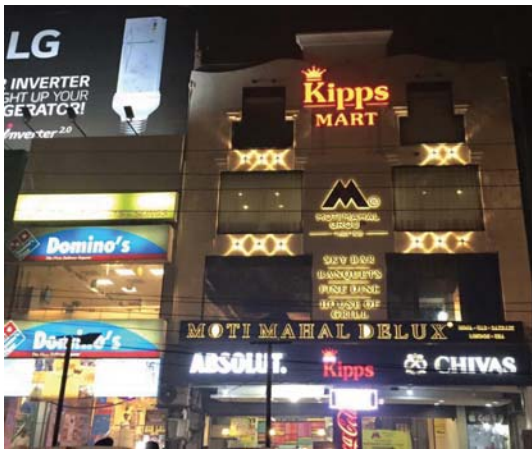
Which new trends and developments would you like to highlight?

With changing trends, the consumers, specially working women and others, who wish to fix up a quick meal are

by authorized bodies abruptly restrict the exports of spices to certain countries, it becomes difficult to sustain and retain the business with importers. Although it is set up bearing in mind the health and safety of global end users, which is of paramount importance, the stringent procedures delay the exports, resulting in loss of time and revenue.

What are your future plans?

Like any other business establishment, we also envisage a plan for our business to flourish in terms of reach and financials. We are striving towards reaching more countries through exports and also develop business with more brands.



BOOSTING SPICE SALES AT RETAIL

Grocers that take spices and condiments with a grain of salt could be missing out on a big selling opportunity. What’s the best way to boost sales and condiments of spices at retail? Retailers and merchandisers agree that cross-merchandising and promotions are the most popular methods of drumming up interest in the category. Yet not all grocers are getting every bottom rupee out of spices, seasonings and extracts. Which is all the more interesting, too, because spices, especially, seem like a category that’s so vital to food preparation on a daily (and even meal-to-meal) basis. To a certain extent, perhaps that’s what it is, the lack of need to market the products — because they always sell consistently. That’s what causes the ‘laissez faire’ attitude toward their marketing among a number of retailers.

More creative operators are, however, carving out their own approaches to selling spices and condiments, with promising results. Take the 34-store-chain Nuts ‘n’ Spices which, according to its promoter Sanklecha offers, “some notable differences to spice and condiment shoppers in comparison to mainstream grocery retailers.” Items include products from local companies to imported condiments, olive oil, vinegars and other offerings. “We offer variations of popular spices and condiments in response to our more health-conscious customers,” notes Sanklecha. The grocer finds offering range and variety as an effective way to spotlight the category. “We offer a variety of spices that give shoppers flexibility in the quantity they buy and encourage trial of new recipes and flavors.”

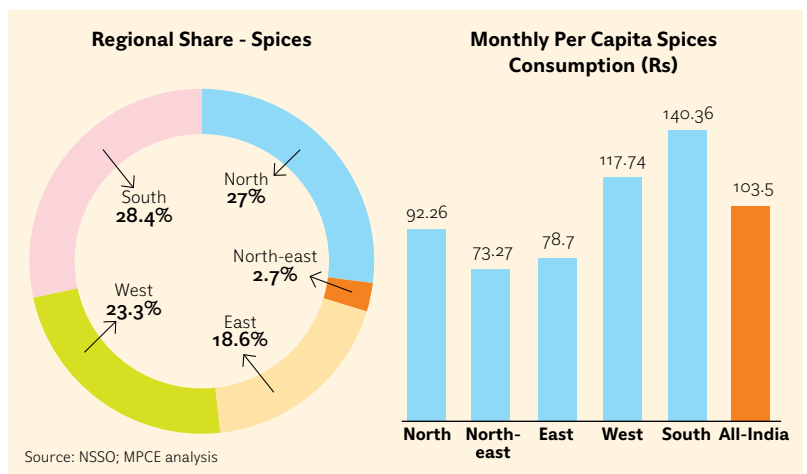
The trend for natural and organic hasn’t gone unnoticed by manufacturers and retailers, either. “Consumers today are not only more practical but they’re also more product-savvy as they understand and try to incorporate more sustainable purchasing habits,” notes Arora. As in other categories, education is an important ingredient in marketing spices and condiments. According to Sanklecha, “we give shoppers as much information

Spices category is another growth leader in the food industry and has grown at a CAGR of 13 per cent over the last decade. By 2020, the market is likely to grow twice as big as its present size with the same growth rate. About Rs. 6,000 crore is estimated to be the branded market in spices. India is estimated to consume over 5 million tonnes of spices annually.

often goes out, too. But to put flavor back in, one has to use something that has zero carbs and zero calories. Other than sodium, it is all about putting back flavor that makes food healthy and enjoyable and that is where natural herbs, organic spices and seasoning can play a very meaningful role. This aspect assumes all the more importance in light of the high rate of diabetes and obesity prevalent in the population today. “By using the right blend of seasonings, we can cut the fat and not the flavor. It’s one of the things that I focus on when I speak to the customers in my shop,” says Sanklecha, pointing out that an egg can be cooked in 101 different ways. “So think about that. Herbs, spices and seasonings can make all the difference. What you offer can help consumers interested in experimenting with flavors and who want something different and healthier.”

The emergence of ethnic cuisines is giving consumers today a taste for bold spices from distant corners of the country as well as globe. Spices are finding their way onto menus and specialty food products, thereby differentiating such items, attracting new customers, and even adding health halos. A key reason for this new interest in exotic spices is the shifting cultural makeup of the consumers, who are going beyond basic spices towards seeking a higher awakening of their palate,” says Arora of Kipps Mart. “Consumers today are using the most unique spices and blends, including emerging spices such as Peri-Peri peppers, and spices such as Star Anise, Saffron and exotic chillies are showing up more widely.”

Now that Sriracha is almost as common as ketchup and salsa, spice addicts need their next big hit, and many experts point to the rising trend for spice mixes. Restaurant consultants believe that foodies are demanding ever-increasing levels of spice in their dishes, pointing to the rising use of cayenne pepper, caraway, horseradish, turmeric, cardamom, cumin, coriander, thyme, mint and other trending spices. This trend is recognized as “spicestacking” and is seen as a new way to personalize food and add nutritional and health benefits.



As per the figures of Spices Board of India and APEDA, the total export value of spices from India in 2017-18 stood at US\$ 3.11 billion with 1.08 billion kg of total spices export. The top 10 importers of Indian spices between Apr.-Oct. 2018 were the US, China, Vietnam, Hong Kong, Bangladesh, Thailand, UK, UAE, Malaysia and Sri Lanka.



as possible about the spices they purchase.” Making its shoppers aware of what’s available also figures prominently in the spice and condiment game plan. “We promote our spices and condiments through end cap displays in-store and through our exhaustive online database of bulk culinary herbs and spices,” says Sanklecha.

As noted earlier, cross-merchandising is the main way to go for many retailers. Suppliers of spices and seasonings are working with retailers in various ways to promote sales, but most agree that the most important tactics are cross-promotion and sampling. It is very important to partner retailers for conducting grocery store demonstrations and to demonstrate the versatility of the spices and seasonings. On their part, retailers should try their best to cross-merchandise within the store between departments and provide food demos with support from suppliers. This will enable them to offer the busy home cook an easy and nutritious meal solution using a spice blend, marinade, dressing or sauce made with natural or organic herbs and spices.

Also, cross-merchandising with the meat department and meals section can inspire new meal

ideas and additional meat buys. Suppliers’ sales team need to work closely with the retail buyer to identify the best opportunities and needs to maximize the shelf space to be highly profitable and successful. They can also use their retail partners as a conduit to consumers with consumer-targeted pamphlets and brochures containing information about a particular spice or herb, the behind-the-scene sourcing story, and recipes. Today, an increasing numbers of shoppers want to know where the products are coming from and if they are being sourced in a sustainable and ethical manner. Sustainability will continue to gain in importance in terms of packaging.

Many retailers are also placing their spice products in the meat department for secondary placement, which makes a lot of sense as this approach can inspire shoppers when they are selecting their meats and thinking about dinner ideas. Another example would be at the holiday time It’s important to have secondary placement of key holiday spices, herbs, extracts and food colors along with other holiday ingredients such as chocolate chips, stuffing, canned pumpkin, etc., to make it easier for the shopper to get everything at once without searching it out — and have enough supply for that busy time where spice section can’t hold enough to meet needs.

According to analysts, there is an ever-growing interest and opportunity to provide foods with health-promoting ingredients and spices and manufacturers should make every effort to choose spices for their medicinal benefits as well as for their culinary flavor.

When it comes to developing new offerings, manufacturers need to pay close attention to

Major state-wise area and production of spices in India										
<i>(Area in Hec, Production in Tonnes)</i>										
States	2013-2014		2014-15		2015-16		2016-17(P)		2017-18 (Est)	
	AREA	PRODN	AREA	PRODN	AREA	PRODN	AREA	PRODN	AREA	PRODN
Rajasthan	821504	674832	866868	618309	1014540	1056170	1004380	1391800	1004380	1391800
Andhra Pradesh	169360	775820	200675	918018	212730	920810	246450	1099750	246450	1099750
Gujarat	541810	848480	473822	1014470	508750	1077560	510750	906850	510750	906850
Telangana	134170	551470	122345	493930	128870	443400	184175	786950	184175	786950
Karnataka	191772	333822.3	218667	400297	225560	401110	250925	537460	246410	499390
Maharashtra	120760	109040	123240	130094	41820	371710	31180	393190	31140	395600
West Bengal	97555	207720	97555	207775	118170	329980	119820	334575	119850	334680
Uttar Pradesh	61656	244022	58039	221711	58590	217670	387000	281010	387000	281010
Orissa	123324	181500	123324	181500	123320	181500	146630	201960	146630	201960
Kerala	166948	114049	167293	140225.36	161500	149520	160850	130060	162660	140050
Tamil Nadu	165995	554509	105057	196127	113200	202530	115540	214120	42940	112600
TOTAL (INCL. OTHERS)	3145610	5833870	3192639	6169901.31	3457000	6901780	4031700	8610810	3969390	8413980

(P) : Provisional (E): Estimate

Source : State Agri/Horticulture Departments/DASD Kozhikkode



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इहउवेह केहाठ
इववइथे राहठ

Of the \$18 billion international spices market by 2020, the share of India will be around \$5 billion. The Indian spices sector growth is expected to be led by branded spices and spice mixes. As the largest producer and exporter of spices, India has immense growth potential. Technological advancements and research and development allow Indian spice exporters to offer high grade products to consumers globally.

what consumers want. With an increased craving for intense flavors, and with more folks cooking at home an increasing number of ethnic dishes, manufacturer need to come out with products that reflect the increasing diversity of the palate. Savvy brands need to offer inspiration line products that provide shoppers with pre-measured amounts of all of the seasonings they need to create an entire dish, with the addition of a few simple fresh ingredients. A recipe card can also be included.

Promotions can be given a lot of thought at stores. By far, the best promotions involve end cap displays or free-standing display units with a seasonal emphasis. Other in-store ideas that work well include point of purchase and shelf talkers, with the focus on new users of organic herbs and spices and at repeat customers. Promotions should feature recipes and demos to help home cooks transform a few ingredients into satisfying holiday meals.

In addition to cross-merchandising and



promotions, the other strategies that resonate with shoppers are sampling and demos highlighting ingredient-based usage, aggressive end cap displays, and consumer outreach through signage, brochures, recipes, websites and social media.

Forward thinking manufacturers can create mobile phone applications featuring inexpensive,

➔ MEDICINAL PROPERTIES OF SPICES

All spice: stimulant, digestive, carminative, anodyne against rheumatism & neuralgia

Aniseed: mild expectorant, stimulating, carminative, diuretic, diaphoretic, in asthma powders and in veterinary medicine

Bay leaves (laurel): stimulant in sprains, narcotic & in veterinary medicine

Bishop's weed (ajowan): digestive, antispasmodic, stimulant, carminative and expectorant

Capsicum: digestive, thermogenic, carminative, stimulant, cardiogenic, antipyretic, serdoric, rubefacient & sialagogue

Cardamom (small): stimulant, tonic, diuretic, carminative, digestive, expectorant, cardiogenic & used in several pharmaceutical preparations

Cardamom (large): hypnotic, appetizer, astringent to bowels, tonic to heart and liver.

Cambodge: astringent, digestive, thermogenic, constipating, used in haemorrhoids, diarrhea, & to control obesity

Cinnamon: astringent, diuretic, carminative, aphrodisiac, deodorant, expectorant, febrifuge and stomachic

Clove: refrigerant, ophthalmic, digestive, carminative, stomachic, stimulant, antispasmodic, antibacterial, expectorant, rubefacient, aphrodisiac, appetizer and emollient

Coriander: carminative, diuretic, tonic, stimulant, stomachic, refrigerant, aphrodisiac, analgesic and anti-inflammatory

Cumin: digestive, carminative, astringent, anti-inflammatory, constipating, diuretic, revulsive, galactagogue, uterine & nerve stimulant

Curry leaf: astringent, anthelmintic, febrifuge, stomachic, appetizing, carminative, constipating, anti-inflammatory, antiseptic, used in skin diseases, in diarrhoea and ulcers

Garlic: anti-cholesterol, antifungal, tonic, rubefacient, stimulant, thermogenic, aphrodisiac, used in cough, asthma, cardiopathy

Ginger: digestive, carminative, emollient, appetizer, stomachic, rubefacient, anodyne, expectorant, anthelmintic, stimulant, mint, stimulant, stomachic, carminative, antiseptic, digestive, antispasmodic, contraceptive, used in vomiting, skin diseases, amenorrhoea and dental caries

Mustard: hermogenic, anodyne, anti-inflammatory, carminative, digestive, anthelmintic, sudorific, tonic, emetic, used in vomiting, abdominal colic, dyspepsia, flatulence, skin diseases

Pepper: anthelmintic, carminative, alterant, antiperiodic, diuretic, digestive, emmenagogue, rubefacient, stimulant, stomachic, used infever, asthma, cough, dyspepsia, flatulence and arthritis

Tamarind: refrigerant, digestive, carminative, laxative, antiscerbutic, febrifuge, ophthalmic, useful in gastropathy, datura poisoning, alcoholic intoxication, scabies and constipation

Turmeric: thermogenic, emollient, anodyne, anti-inflammatory, vulnerary, depurative, antiseptic, appetizer, carminative, expectorant, stomachic, anthelmintic, stimulant, ophthalmic, tonic, used in skin diseases, dyspepsia, asthma, cough, bronchitis, inflammations, ulcers, worms and skin discoloration

Vanilla: aphrodisiac



easy-to-prepare organic recipes, which can be easily downloaded by users. Retailers can offer meal solutions display that allows for the merchandising of seasoning mix packets for consumers to make economical meals with just 10 to 15 minutes of prep time. By collectively displaying packets in one area, retailers can see significant sales increase. In line with the major trends, companies can offer gluten-free products, and reformulate their offerings so that the production facility will contain no gluten, and reinforce the companies' desire for convenient, affordable meal solutions.

New products developed in response to consumer trends can include popular seasoning mixes to capitalize on the higher consumption of ethnic foods at home. Companies can roll out spices in their mini-spice lineup with products such as cayenne pepper, curry powder, lemon peel, marjoram, nutmeg and tarragon, along with such pre-blended seasonings as pumpkin pie spice. The mini-spice containers offer advantages over larger spice bottles – the smaller size is a less expensive way to try out new or unfamiliar spices, and is more likely to get used up before the spice loses its freshness and robust flavor.

MARKETING OF SPICES

No country in the world produces as many varieties of spices as India. The availability of tropical, subtropical and temperate climates and varied soil types make it possible to grow almost all spices. Every state and union territory grows at least a few spices. Andhra Pradesh, Karnataka, Kerala, Gujarat, Madhya Pradesh, Maharashtra, Orissa, Rajasthan, Tamil Nadu and West Bengal are the leading spice producing states. The important spices produced in India are black pepper, cardamom, ginger, turmeric, chilli, garlic, coriander, cumin, tamarind, curry leaf, clove, cinnamon and mint. The bulk of the production is consumed within the country. Spices are used in various ways of which culinary preparations are most significant. Indian curry is rich in flavor and aroma. Spices find application in many ayurvedic medicines. Extracts are used in perfumes, cosmetics and beauty care products. In religious rites, some spices have a prime place. Recent trends in increased consumption of spices in the world food market and growing health concerns have made it to view global spice production and marketing in a significantly changed perspective. Spices are now perceived as an essential ingredient of foods and not merely another commodity.

As the international market becomes increasingly competitive, it is imperative to enhance the production and productivity and bring down the cost of cultivation to make Indian spices globally competitive. Low productivity and high production cost make Indian spices costlier in the world market. To increase productivity, technical inventions such as



hybridization and tissue culture should be adopted more intensely. Their cultivation is to be popularized with better farming technology. Farm processing has to be improved by transferring modern methods to farmers. Scientific post harvest handling has yet to come to agricultural operations in the country, especially in spices. This is one of the major reasons for quality problems in spices exports. Our natural competitive advantage in production goes waste due to poor quality of the produce. Cleaning, processing and warehousing facilities at exporter's level should also be strengthened. Spice oils and oleoresins, which constitute merely 30% of total export from India, attract 6% countervailing duty in the US, the major importer of these value-added items while there is no duty for import of whole spices. This discourages developing countries like India in developing its processing industry, in which developed countries have a monopoly for decades.

Import of low grade, low priced spices from other countries to India and re-export under Indian label may destroy the quality image of Indian spices in international market and may detrimentally affect the demand of Indian spices in future. India still enjoys only the status of a commodity exporter in the US, Europe and Japan in the export of spices oils and oleoresins. So far, Indian entrepreneurs and exporters have not been able to develop any brand of their own in these markets. By and large, Indian brands have yet to find markets beyond the middle class ethnic Indian population settled in these countries.

India also faces stiff competition from other producing countries that supply spices in whole form. Most of these countries have no domestic market for spices they are producing, forcing them

Many retailers are also placing their spice products in the meat department for secondary placement, which makes a lot of sense as this approach can inspire shoppers when they are selecting their meats and thinking about dinner ideas.



“
Herbs, spices and seasonings can make all the difference. What you offer can help consumers interested in experimenting with flavors and who want something different and healthier.

— **Sunil Sanklecha**
 Managing Partner,
 Nuts 'n' Spices

to sell their produce even at cost price – examples include cardamom from Guatemala, pepper from Vietnam, cloves from Indonesia. Many trade regulations like non tariff barriers like eco-labeling, clear-cut specification of production process, child labor, non application of certain chemicals, ISO certification of management systems, sanitary standards and technical regulations are becoming strong instruments of competition. The changing demands of consumers in the international market will be a challenge but they will also create opportunities for India.

The problems in the marketing of spices differ from those in other agricultural commodities in the country. A majority of farmers are engaged in the production of spices are small and marginal. Due to their weak financial position, they prefer to dispose off their small marketable surplus immediately after harvest to village merchants and itinerant merchants or in nearby rural markets. Because of a long gestation period, farmers find it difficult to invest money for the development of plantations. There is a need to organize growers' cooperatives for integrating farmer's production and marketing activities for providing them the maximum benefit from cultivation. It also involves:

Development of transport and communication facilities: Many of the spice growing areas are located in interior pockets where market accessibility is very poor. There is a need to organize and develop transport and communication facilities in such remote areas.

Regulating production and supply of spice: The demand of spices is inelastic. Overproduction creates a glut – affecting prices of spices adversely. Even for export-oriented spices like pepper and cardamom, even a small excess production has great repercussions. Therefore, there is a need to regulate production and supply of spices in the country. The Spices Board needs to look after these aspects in establishing production, prices and export demands.

Institutional marketing: Private traders dominate the marketing of spices with a large number of intermediaries involved therein. The producers get comparatively a small share of price paid

by consumers. Apart from the role played by NAFED in procurement and price stabilizing operations in ginger and cardamom, there are no institutional arrangements for protecting the interests of producers/ sellers and consumers of other spices. The role of institutional marketing in spices should be extended particularly in view of their economic importance for earning foreign exchange.

Market intelligence and market regulation: The marketing of spices in the country suffers from a lack of market intelligence, absence of market recommendations, intermediaries' trade practices, malpractices and delayed payments to producer/ sellers. As per the recommendations of the National Commission on Agriculture, all the spices should be notified for regulation of marketing therein and the necessary coverage should be given in marketing information system.

Extension of voluntary/ compulsory grading: Virtually, little grading is being done in spices at producer's level. Selected spices such as pepper, cardamom, chillies, ginger, turmeric, curry powder, onion seeds, etc., are covered under the Compulsory Export Quality and Pre-shipment Inspection Scheme of the Directorate of Marketing and Inspection. The program of voluntary grading as well as the compulsory grading for exports should be extended to cover other important spices also.

Stabilizing production and ensuring competitive prices for exports: The processing facilities, market intelligence and research should be undertaken to stabilize production and ensure competitive prices in export markets.

Value addition – the currency for future: Value addition in spices is limited to oils and oleoresins, ground spices, curry powder and dehydrated and frozen dried spices. Efforts are to be made to develop and commercialize new end products like micro-encapsulated spices, sterilized spices and the likes for export. More units for the production of value added items should be set up through joint ventures with foreign collaboration for increasing exports.

Improved packaging and branding of spices: Competition is fierce and quality, cleanliness, proper storage and warehousing facilities and distribution should be ensured. In order to survive, the price wars, branding and higher productivity could help. By increasing the productivity, due to higher economies of scale, costs can go down and thereby increase the profit margins.

Most spices are hygroscopic in nature and need specialized packaging in order to maintain the quality. Exporting the consumer packed spices can earn higher unit value for the same quantity. The Indian Institute of Packaging has designed containers for spices and spice products. Considering the strong competition in world spice market, building up of brand image is essential in the case of packed spices.

Recent trends in increased consumption of spices in the world food market and growing health concerns have made it to view global spices production and marketing in a significantly changed perspective. Spices are now perceived as an essential ingredient of foods and not merely another commodity. The future success of spices industry, to





Har Ghar ka swaad king, Vandevi Hing

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a great degree, depends on the ability to establish standards and regulation for production, processing and marketing the commodity. These regulations have to be in balance with the economics of production, the realities of provable health claims from utilization and the marketing factors that are characteristic to the industry. India has to take a number of coherent steps to increase the productivity and reduce the production cost. The only option is to raise productivity to international levels so that the prices could be competitive without affecting the income of our farmers. The major input, which can offer a higher productivity, is high-yielding varieties.

COMPARATIVE ADVANTAGES OF INDIAN SPICES

India has certain natural comparative advantage with respect to the spice trade. There are diverse agro-climatic zones, availability of innumerable varieties and cultivars of each spice suitable for different climatic conditions, comparatively cheap labor, a large domestic market for better buoyancy in trade, a tradition of using spices and spice production in food, medicine and cosmetics. The Indian spice trade has also achieved competitive advantage in the capabilities acquired by the spice industry over the last decade in quality management,



improved packaging and technological innovations in production and processing.

The third and most important competitive advantage is the induced advantage to maintain for which policy interventions would be important. Significant structural changes in the world trade mechanism and new issues like environment and human rights are likely to affect patterns of trade. Against this backdrop, strategic policy interventions are a must. Policy interventions need to be targeted at specific spices or geographical areas, to remove impediments adversely affecting the country's exports.

Spices are important high value commodities traded internationally for many centuries. In modern times, international trade in spices have increased dramatically, which could be attributed to several factors, including rapid advances in transportation,



SPICE WISE AREA & PRODUCTION

<i>(Area in Hec, Production in Tonnes)</i>										
Spices	2013-14		2014-15		2015-16		2016-17		2017-18 (adv.Est)	
	Area	Prod.	Area	Prod.	Area	Prod.	Area	Prod.	Area	Prod.
Pepper	122400	37000	123900	70000	131790	48500	134280	57000	135915	64000
Cardamom (Small)	69970	16000	69970	18000	70080	23890	69357	17990	69330	20640
Cardamom (Large)	26060	4465	26387	4850	26387	5315	26617	5570	26617	5430
Chilli	791930	1376400	766620	1621480	742950	1497440	864730	2394320	814790	2302670
Ginger	138200	683160	153100	795820	156910	1025110	160480	1047190	160860	1043130
Turmeric	207570	1092630	178470	846250	183480	967060	248050	1215520	224260	1107920
Coriander	516070	496240	604090	546800	624780	572990	672760	863530	665190	866800
Cumin	690080	445030	701560	372290	808230	503260	780920	500360	780950	500380
Celery	4070	5510	4070	5510	4010	5510	4010	5510	4010	5510
Fennel	94070	135930	46760	78570	76000	129350	89540	148560	89580	148640
Fenugreek	90500	110530	124710	134100	227960	248350	220670	310070	219720	311280
Ajwan	39260	26610	24010	17180	26600	16010	34340	27840	34500	27940
Garlic	238760	1221380	261510	1424860	295600	1603500	302980	1722750	322340	1716920
Tamarind	58720	191750	54120	200390	47660	190780	49660	202150	48830	199860
Clove	2060	1060	2380	1260	2340	1210	2200	1230	2230	1230
Nutmeg	19690	13210	21110	14400	22360	15170	22760	14020	22640	14060
Cinnamon	277	50	277	50	320	70	240	150	265	80
Grand total including others	3145610	5833870	3192640	6169900	3457000	6901780	4031700	8610810	3969390	8413980
GRAND TOTAL IN MLN TONNES	5.83		6.17		6.9		8.6		8.4	

Source: State Agri/Hort. Departments/DASD Kozhikkode

Cardamom: Estimate by Spices Board

(P): Provisional

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LM 3210
Customer Side Advert/
Promotion Display



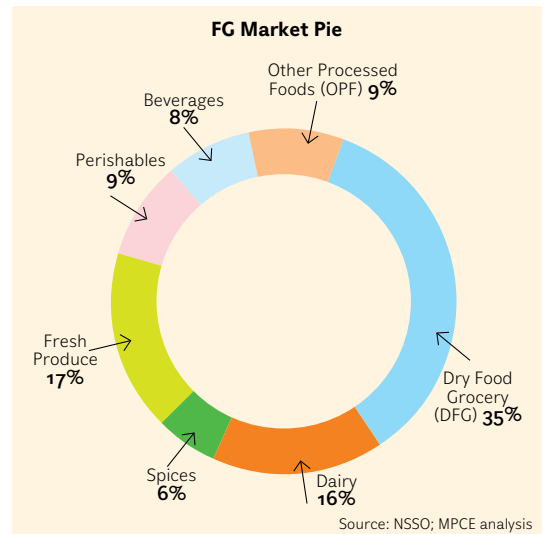


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Spice sales in general have been strong and growing over the past year, with many new flavor line extensions coming to market as customers continue to demand unique flavors that allow them to explore new taste and cooking experiences.

— Mohit Arora
 Director, Kipps Mart

permitting easy accessibility to world markets, growing demand from industrial food manufacturers of wide ranging convenience foods, which are either ready to eat or requiring minimal preparation time in the household, migration of large number of people of different ethnicity with their traditional food habits, to meet the changing requirements of industry and commerce and exposure to culinary delicacies of other regions of the world by increasing business and tourism travel. The growing demographic diversity in the US and other western countries as well as the desire of consumers to have foods with rich spicy and exotic tastes have resulted in an increasing demand for ethnic foods that contain a variety of spices in restaurants. This has led in turn to a demand for normal foods, including new processed foods at the retail level.

Also, there is an increasing demand and consumption of spices in major importing countries like the US, the EU, Japan and the Middle East. An aspect of spice trade and industry, which has emerged as important and critical to most importing



countries relates to quality and safety. Because of this, a wide variety of value-added products based on spices and condiments have gained wide acceptance.

ESTIMATED EXPORT OF SPICES FROM INDIA DURING APRIL -MARCH 2017-18 COMPARED WITH APRIL -MARCH 2016-17								
ITEM	APRIL -MARCH 2017-18(*)			APRIL -MARCH 2016-17			2017-18 % CHANGE IN	
	QTY (TONNES)	VALUE (Rs.LAKHS)	RATE (Rs/Kg)	QTY (TONNES)	VALUE (Rs.LAKHS)	RATE (Rs/Kg)	QTY	VALUE
CHILLI	443,900	425,633.00	95.88	400,250	507,075.00	126.69	11%	-16%
MINT PRODUCTS(3)	21,500	322,835.50	1501.56	22,300	252,750.00	1133.41	-4%	28%
SPICE OILS & OLEORESINS	17,200	266,172.40	1547.51	12,100	230,775.00	1907.23	42%	15%
CUMIN	143,670	241,799.50	168.30	119,000	196,320.00	164.97	21%	23%
TURMERIC	107,300	103,567.00	96.52	116,500	124,189.00	106.60	-8%	-17%
PEPPER	16,840	82,078.00	487.40	17,600	114,312.50	649.50	-4%	-28%
CURRY POWDERS/ PASTE	30,150	61,619.50	204.38	28,500	59,910.00	210.21	6%	3%
CARDAMOM(S)	5,680	60,908.50	1072.33	3,850	42,150.00	1094.81	48%	45%
OTHER SPICES(2)	38,305	60,192.75	157.14	40,210	50,595.00	125.83	-5%	19%
GARLIC	46,980	30,936.00	65.85	32,200	30,711.50	95.38	46%	1%
CORIANDER	35,185	27,274.70	77.52	30,300	29,207.50	96.39	16%	-7%
FENNEL	34,550	25,906.50	74.98	35,150	30,875.50	87.84	-2%	-16%
NUTMEG & MACE	5,500	22,094.30	401.71	5,070	23,641.65	466.30	8%	-7%
GINGER	22,605	21,606.55	95.58	24,950	25,705.00	103.03	-9%	-16%
OTHER SEEDS (1)	22,175	16,045.80	72.36	18,100	15,455.00	85.39	23%	4%
FENUGREEK	29,280	12,688.90	43.34	34,680	18,276.50	52.70	-16%	-31%
CELERY	6,480	5,950.40	91.83	6,250	6,246.00	99.94	4%	-5%
CARDAMOM(L)	760	5,646.00	742.89	780	8,265.50	1059.68	-3%	-32%
TOTAL	1,028,060	1,792,955.30	174.40	947,790	1,766,460.65	186.38	8%	1%
VALUE IN MILLION US \$		2781.46			2,633.29			6%

(1) INCLUDE MUSTARD, ANISEED, AJWANSEED, DILL SEED, POPPY SEED ETC.
 (2) INCLUDE TAMARIND, ASAFOETIDA, CASSIA, S
 (3) INCLUDE MINT OILS, MENTHOL & MENTHOL CRYSTAL.
 (*) INCLUDE LATE REPORTS OF PREVIOUS MONTHS.

SOURCE : ESTIMATE BASED ON DLE FROM CUSTOMS, REPORT FROM RO'S AND LAST YEAR'S EXPORT TREND ETC.



Marketing of spices has undergone a sea change. Ready to use spice mixtures, and other value-added products designed to fetch better returns have come into the market and are widely accepted. Indian spices come in a variety of forms like whole spices, spice blends, crushed spices, curry mixes, curry pastes, pickled spices.

The Spices Board has adopted two major strategies for quality improvement. One is the introduction of Indian Spices logo; the other is Spices House Certificate. It has a credit in improving the share of value-added products in the export basket to 45% in the past decade. The global food market is flushed with all types of branded spices in consumer packs. All of them address the consumer with claims and counter claims for visibility and attention. But the packs usually do not reveal the source or origin of the product, nor do they offer a clue as to the quality associated with it. The result is that the consumer is totally confused. The Indian Spices logo is a major effort to overcome this. The Board awards the logo selectively to exporters who have certified processing and quality control capability and maintain a high level of sanitation at all stages.

CHALLENGES FACING SPICES INDUSTRY

Hygienic and clean spices: As any other agricultural products, spices and herbs may be contaminated with pathogens, heavy metals, naturally-occurring toxins such as mycotoxins, pesticides and accidental contaminants. Currently, issues like pesticide residue, authenticity of raw material (food fraud), purity of raw material, biphenyl in herbs and spices, especially nutmeg and mace and traces of DEET in some spices are quite common and have to be addressed at the earliest.

Standard setting organizations like European Spice Association (ESA) have developed systems to meet the requirements of food legislation and consumer demand. Systems that provide specific information on origin of purchase, exporter details, tests of incoming material, allergen management system in place and packaging material in conformity with legislation.

Low productivity: Due to various agro-climatic conditions, the productivity and production of major spices have seen a downward trend in recent past. Ginger, garlic, turmeric and tamarind have better productivity whereas other spices are seeing stagnancy in productivity.



Supply chain and market linkage: In case of small enterprises, adequate 'kitchen style' processing is required at farm level. A lack of finances and inadequate information of the required technology to improve production efficiency are constraints in developing efficient supply chain. An efficient supply chain ensures minimizing wastages and improving the quality of spices.

Post-harvest challenges: Due to an increase in other economic activities, producer countries are facing major challenges in finding the agriculture labor for carrying out good agriculture practices. Post-harvest operations are important to ensure healthy, clean spices for the supply chain forward. Ginger peeling, solar drying of spices, boiling, drying and polishing of turmeric, on-farm processing seed spices are some areas that require immediate attention.

Lack of price discovery mechanism: Apart from production, marketing and trade, stocking of spices is also a factor that influences the farm level prices. Farmers generally overlook the stock position of previous years and have to face the volatility in domestic prices. Even though the spice industry has played an important role in enhancing the Indian economy, the lack of availability of quality planting materials, low productivity, non-adoption of recommended cultural practices, integrated pest and disease management practices, storage, processing & packaging facilities, inadequate extension network for effective transfer of technology and high fluctuations in prices of the commodities and the absence of a support price are considered as important constraints in production and marketing of spices. **PG**

India is the land of spices and could exploit the fast growing nutraceutical sector with her high intrinsic quality spices. The scope of spices like turmeric, ginger, fenugreek, garlic and red pepper in the nutraceutical industry with their possible role in the control/prevention of important health disorders, is on the rise.

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

Khaya Toh Mazaa Aa Gaya!



➔ **Company and brand profile:** Pravin Masalewale, one of the masters in the exotic world of spices, was founded with a humble beginning in Pune 57 years ago by an entrepreneurial couple Hukmichand Chordia and Kamal Chordia.

Pravin Masalewale has mastered its skill and established its strong reputation by unlocking and revealing the most preferred blend of spices that help make the Indian food so distinctive in taste, flavor and aroma.

With manufacturing units spread across western India, the Company has been churning out products with outstanding quality and today produces four globally recognized brands – Suhana, Ambari, Pravin and Toofan.

These brands are now globally recognized for following the highest possible quality standards through a regular and rigorous process of International Quality Certification and Management Process.

Product portfolio: Suhana has expanded to over 150 products, which include spices, blended spices, easy-to-cook mixes, ready-to-eat ‘cuppas’, pickles, instant mixes like dhokla, idli and many more.

Brand and company philosophy: The Company believes in delivering not only the widest range of products to its customers but also a complete product experience. With a relentless focus on bringing out best-in-class international quality products, the Company and its brands are deeply rooted to its values:

- Ethics before all
- Best-In Best-Out
- Always, value each buyer and value for each buyer
- Your wish is our command
- Endeavour to excel
- Growth through partnering

Growth strategy: The Company is focusing on new age, contemporary products – cuppa/ instant mixes/ spice

mixes (easy-to-cook), etc. – in step with the evolving urban lifestyle. Besides, it is strengthening its footprint both in the domestic and foreign markets by ramping up exports.

Retail approach: Its sales and distribution team reaches out to the trade day in day out covering the entire spectrum of trade. Both MT and GT are an essential part of its retail success story and it ensures that it services all trade partners consistently and satisfactorily.

Market reach: With the trust of its customers, world-class array of products and a zest for innovation, Pravin Masalewale with its Suhana, Ambari, Pravin and Toofan brands continue to march steadily towards a promising future. The aroma of Suhana has spanned and surpassed national and international boundaries. Today, Suhana has a distribution network in more than nine states of India with over 2 lakh retailers.

Pravin Masalewale has also made headway in international markets like the USA, South Africa, the UK, Mauritius, Kuwait, Nigeria and many other countries. From being leaders in Maharashtra, Pravin Masalewale brands now reach out to over 20 international markets.

“



We have our own full-fledged R&D center, which keeps continuously updating itself and is in sync with the market requirements. These efforts have helped us widen our range for customers not only with a variety of products but also keeping in mind the economies of scale and in delivering the right product mix and service to our customers

– Vishal Chordia
Director - Strategy & Marketing,
Pravin Masalewale

Roadmap ahead: Pravin Masalewale will continue to challenge itself in delivering the best to the ever growing customer needs. It will continue to strengthen its current range by introducing products that add value to all its stakeholders. Going ahead, the Company plans to further sharpen its focus on distribution, which happens to be its core strength. It has already stepped up its efforts to take its brand communication to other markets, thereby resulting in a higher ROI and a larger geographical presence.

Key markets and customer segments: The Company is a market leader in the western geographies of India, and is steadily gaining foothold in the northern territories. While continuing to serve its existing client base, it is on the lookout for mediums to reach new customers and address new mindsets.

Marketing and branding strategy: The Company looks at getting the right blend of various ATL and BTL mediums to reach out to its customers with a 360 degree approach. On the basis of research, it designs and invests on communication activities that deliver high last mile impact.

Vishal Chordia has turned around his family spices business, which he took over in the late 1990s. He gave his spices business a new name and brand identity, segmenting and expanding its product line, ramping up manufacturing units, roping in distributors and retailers across India and international markets, and creating loyal customers. “My family was happy to grow the earlier way, by increasing manufacturing capacity. But the post liberalization period called for different ways of managing a business and a lot of business changes had to be made,” he reminisces.

He set about acting on his vision by changing the brand name. “Mid-2000s, we started working on it and we took a year to finish the rebranding, and re-launched our products under the Suhana brand in 2001.” To stay ahead of multinational FMCG companies, Suhana Spices invests a lot in R&D and product development. “Taste customization will keep happening at Suhana,” says Vishal, who besides owning his food and spices business is also a Minister of State (MOS) and Chairman of the Maharashtra State Khadi and Village Industries Board.

Brand USP: Pravin Masalewale has carved its market niche on its exclusive and customized range of products developed on the basis of thorough research and deep understanding of consumer needs. The Company operates state-of-the-art manufacturing plants not just in



Maharashtra but across western India and its products and brands reflect the perfect blend of innovation, expertise, quality and leadership. Pravin Masalewale has been consistent in its world-class quality of spices, manufacturing over 100,000 kg of spices per day under a rigorous process that ensures stringent quality control at par with international standards.

At Pravin Masalewale, retaining the trust of its customers and business partners is extremely important and that has helped the company and its brands win various certifications and awards. A continuous response from customers saying ‘*Mazaa aa gaya*’ on relishing food made with Suhana, not only contributed as a deciding factor to their brand positioning, but they also incorporated this emotion in their communication - ‘*Khaya Toh Mazaa Aa Gaya*’.

Industry recognition and honours:

Pravin Masalewale has been certified by some of the reputed organizations for its highest processing and quality standards. Over the years, the Company and its brands have won several National and International awards and accolades, which include:

- 1996 FIE Foundation Award to Rajkumar Chordia, Chairman, Pravin Masalewale
- 1997 Council for Fair Business Practice, India
- 1999 Top Management Council Award by IMM, Maharashtra
- 2006 National Productivity Award from Ministry of Food Processing Industries
- 2007 Rajiv Gandhi National Quality Award from Bureau of Indian Standards
- 2008 CII-EXIM Bank Award from Confederation of Indian Industries
- 2009 Rajiv Gandhi National Quality Award from Bureau of Indian Standards
- 2010, 2011 and 2012 Great Taste Award, UK
- 2013 ITQI Award, Brussels
- 2015 Great Taste Award, UK
- 2015 Fastest Growing Food Brand of India award by Hospitality India
- 2015 Contribution to Food Processing Industry Award by All India Food Processors Association

A journey that began way back in 1962, most certainly is on the fast track of progress with all its customers and trade partners on board.

An instantly recognized household name in spices

➔ **Company and brand profile:** With a humble beginning from a modest shop in Karol Bagh Delhi, Dharampal Gulati, or Mahashayji as he is fondly referred to, laid the building blocks of his future empire in the spice business with his company **Mahashian Di Hatti Limited**. The company is one of the biggest brands of spices in the country today and operates about two dozen factories in India, apart from having offices in Dubai and London.

Besides being a manufacturer, MDH is also a distributor and exporter of ground spices and spice mixtures. It specializes in several unique traditional blends of spices suitable for different recipes. Currently, MDH owns a substantial slice of the organized spices market in India.

Brand philosophy: The company is steadfastly committed to the quality and purity of its spices. Backed by its well equipped research and development laboratories, it is focused on working incessantly to develop new spice blends and in the creation of new products.

Product portfolio: MDH manufactures and markets a wide range of ground and blended spices.

Production capacity and market reach: Currently, MDH has more than 60 products in its kitty and it exports to about 100 countries, including the U.K., Europe, the U.A.E., the USA, Canada, South East Asia and others. Its best-selling products include Deggi Mirch, Chat Masala and Chana Masala – each selling roughly a

crore packets every month. So much so today spices worth crores of rupees are manufactured and packed by modern machines and sold throughout India and abroad through a network of over 1,000 stockists and over 4 lakh retail dealers.

Brand USP: From Kashmir to Kanyakumari, MDH spices are a symbol of good taste and fine cooking. In fact, taste and flavour have become the definition of MDH spices. As spices are MDH's core product, it will be only concentrating on this category in the near future. Starting with manually ground spices, MDH switched over to fully automatic machines to meet the fast growing demand for MDH Spices.

MDH takes special care in selecting the raw material for the ground-single spices category. This provides the consumer with spices made from the choicest raw material in maintaining the highest processing standards.

Similarly, MDH blended spices are specially formulated to impart genuine taste to Indian food preparations. Decades of research has gone into preparing these blends needed in specific Indian dishes, and MDH does not use any synthetics.

Market outlook and strategy: The company sees a lot of scope to widen the Indian spices market by converting consumers from unbranded products. By keeping its business low margin, MDH is helping the category grow with its focus on affordability.

Industry recognition and awards: MDH spices has been recognised through various



The company procures raw material directly from the centers of produce to maintain uniform taste and quality. MDH takes special care in selecting the raw material for the ground-single spices category. This provides the consumer with spices made from the choicest raw material and in maintaining the highest processing standards

– Mahashayji Dharampal Gulati
Founder, MDH

awards from time to time. Apart from Mahashay Dharampal's efforts to achieve greater heights of fame for the MDH, his son Rajeev Gulati's contribution is no less who is currently the Director of the company. His major achievement lies in putting MDH on the world map. In January this year, Mahashay Dharampal Gulati was honoured by the Government with the country's third highest civilian award, Padma Bhushan.





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A leader in premium quality spices

Company and brand profile: Paras Spices Pvt. Ltd. began its journey from being a local supplier of spices to a supplier of International quality savory ingredients in 1982. Nestle, at the time of its iconic 'Maggi noodles' launch approached Paras Enterprises (now Paras Spices Pvt. Ltd.) for its spice requirements. Today, Paras Spices works with most of the MNCs present in India and it also exports to over 12 countries. It has a diversified bouquet of offerings, which includes spices, seasonings, herbs, dehydrated vegetables, dried starches, chicory, pulses, sugar & salts, etc. It is primarily a B2B company that focuses on the clients with stringent quality specifications. The company works closely with its clients to understand their needs and develops customized solutions for their end products.

Product portfolio in spices: Paras Spices processes spices in whole, powdered, kibbled, and crushed form. In seasonings or savory solutions, it has a wide range of offerings, which include dustings, sprinklers, premixes, functional seasonings, etc.

The product range includes black pepper powder, coriander whole, cumin whole, kasoori methi leaves, red chili flakes, peri-peri seasoning, fiery chili seasoning, Italian seasoning, Hydrabadi biryani seasoning, schezwan mix seasoning, mint seasoning, Amritsari marinade, smokey garlic marinade, and tandoori marinade. Flavored drinks include jaljeera premix, Portuguese lemonade premix, shahi kahwa and masala lemonade premix.

Brand USP: As one of the largest companies in India in the premium quality spices segment, Paras Spices works with a majority of the MNCs in India that use

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Indian kirana store owners have an ocean of wisdom when it comes to the spices category. But knowing which dish is prepared in a particular month or a specific period can help the retailer decide on how to give prominence to the specific spicemix while allocating the shelf space. Secondly, as consumers' tastes and preferences are also evolving, retailers need to accept the fact that the consumer is willing to try newer things and can even pay more for better quality products.

— Paras Budhiraja
Director, Paras Spices Pvt. Ltd.

spices as an ingredient. Its state-of-the-art manufacturing and lab facilities ensure that all its products comply with stringent International quality norms. Its in-house facility processes more than 120 different kinds of spices & seasonings. The company has established its reputation on the basis of its innovation in terms of product features and ingredients. The company ensures that it procures all its spices in whole form and processes them in-house, so that there is no possibility of adulteration. Its quality assurance and in-house lab also ensure that all ingredients are analyzed at different stages to ensure quality and consistency.

New product launches: Paras launched a retail brand Orika in 2018. This brand was launched keeping in mind the requirements of the millennials and generation Z and their evolving taste palates and it is customized according to the new taste habits of today's young generations. All international flavors and value-added spices of India and seasonings are part of the product range of Orika.

Market strategy and reach: Overall, the company's marketing strategy is to focus first on the existing clients better by continuously improving its level of services and product quality and then expanding with the new one. It enjoys an impressive market presence in north India.

Product innovations: Paras is focused on developing newer recipe driven spices or spice mixes as well as combinations of conventional spices and value-added spices like different ranges of oregano and smoky garlic marinade. The company believes that recipe-driven spices or spice mixes provide standardization as well as consistency and there is still room for adding more customizations to the end product.

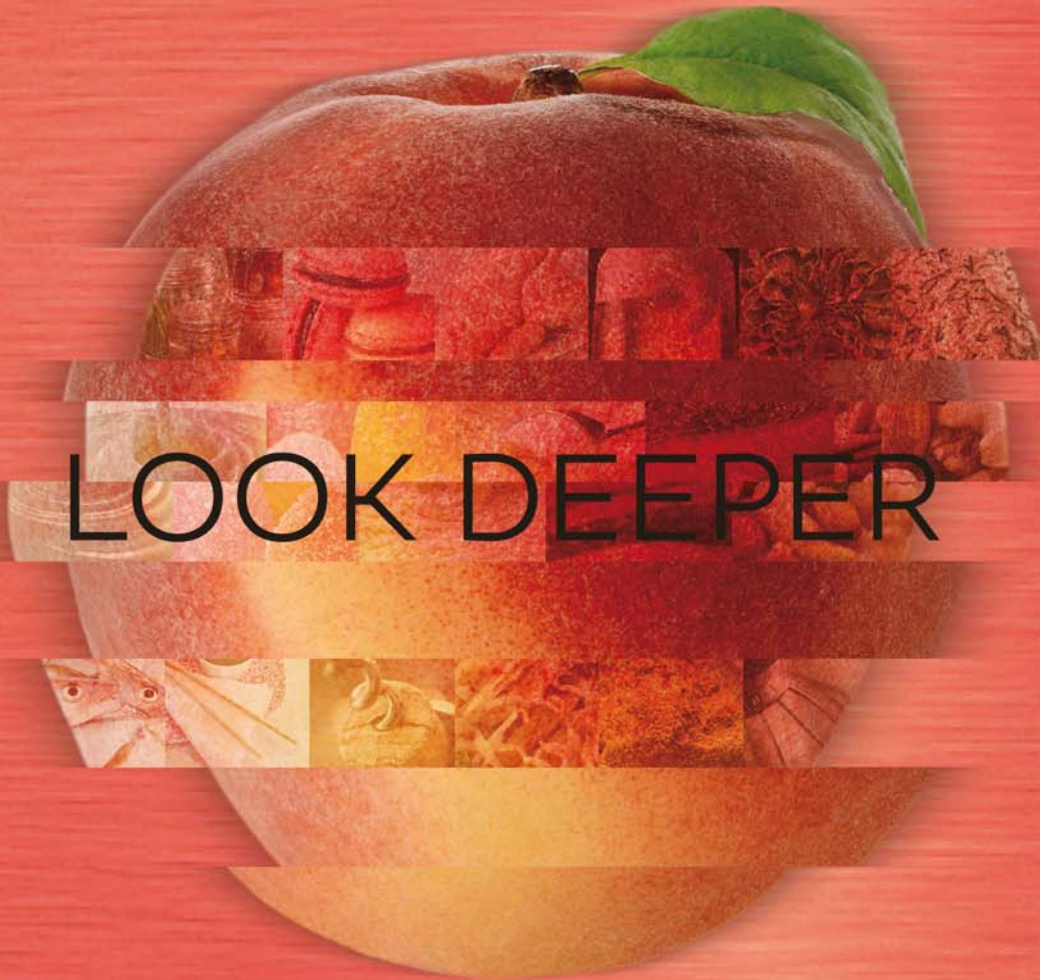
The profile of spices changes with time and the storage condition. For instance, in the case of chili powder, the red colour starts turning darker after a certain storage time. To overcome such challenges, Paras has its own set of specifications and norms for raw material, processing, storage and packaging. The company lays a greater focus on the packaging material, especially with regards to convenient packaging, which is a rising trend. More brands are entering this space with sprinklers and easy-to-use packs or sachets and Paras is focusing on the use of minimalist and simpler packaging designs with much bolder labeling in keeping with the trend internationally. It uses highly moisture resistant packaging material with zipper pouches, thus maintaining the quality of the product.

Roadmap ahead: By the end of 2019, Paras Spices wants to expand its reach to all the metropolitan cities across India and in the e-commerce sector as well.





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Hing manufacturer with a strong market identity

→ Company and brand Profile: Kinjin Food is one of India's leading manufacturers and sellers of compounded asafoetida (commonly known as hing). It is a spice used in tadka and adds a unique flavour to the food. The company is marketing the products under its brands Vandevi, Gouri and Laxmi Narayan.

Kinjin Food's manufacturing facilities are ISO 22000-2005 and HACCP certified and strictly follow the FSSAI rules and regulations. Its quality has been a strong identifier in the markets. The company sources its raw materials from the best suppliers in the world and have all the ingredients tested at NABL approved laboratories as well as its in-house lab.

Brand USP: Kinjin Food is focused on quality and customer centricity. The brand uses the latest technology in manufacturing and ensures that there is no manual interference in the entire process of manufacturing and processing. The company maintains consistency in its trademark fragrance across batches due to a stringent manufacturing process. In line with customer preferences, it has started manufacturing smaller packets of 10 gm and 25 gm. Hing itself is a traditional spice and the brand retains the original Vandevi taste of its products.

Market approach and growth strategy: The overall spice market globally is pegged to be USD 18 billion by 2020. There are

“



I would urge retailers to focus more on selling good quality branded spices. This would ensure that the customers get the best. We are open to suggestions from different markets on merchandising and some level of experimentation to help increase customer awareness and thereby grow the category.

— Jinisha Shah
Business Manager, Kinjin Food Pvt. Ltd.

no independent estimates of the market size specifically for hing due to the fragmented nature of the market.

Kinjin Food has been growing a CAGR of 10% over the past few years. The industry has been doing well and there is a robust domestic demand for the brands. The consumption of hing is growing over the years thanks to nuclear families and cross pollination of different foods in different regions of India. Kinjin's

focus is on maintaining the quality of its products, which will be the leading drivers of growth. The company believes that there are a lot of untapped opportunities in private labelling, exports, and even in supplying to the pharma industry. People are getting increasingly aware of the health benefits of asafoetida and that is opening up newer avenues for growth.

The company believes that the branded spice market segment makes for about 33% of the total spice market. With the new laws and quality norms set by the FSSAI and better recognition in overseas markets, there are better prospects for the brand to grow. Kinjin's focus is on quality and the brand wants to harness this strategy to capture market share from the local players. As consumers become more aware of adulteration in local products from spice vendors, there is a shift towards good quality products.

The trade partners are an integral part of the Kinjin brand. In an attempt to get closer to the customer, the brand is looking for new partners, especially in markets that are relatively new for the brand. The products are available across e-commerce and digital channels and the brand will set up its own digital store soon.

Consumption trends: Hing is used in almost all Indian food – in the preparation of dal, sambhar, rasam, vegetables, kichdi, etc. The papad and pickle industries consume a good quantity of asafoetida and compounded asafoetida. Ayurvedic and pharma industries also use asafoetida and compounded asafoetida. The consumption patterns of asafoetida are different in different parts of the country. The pharma industry recognizes asafoetida as a spice with a lot of medicinal benefits.

Future plans: The brands sold by Kinjin Food are well established and are dominant players in most of the markets. The brands' well-established channel of distributors works well to promote its products. In the areas where the brand has not developed new channels, it is focusing on selling smaller pack sizes of 10 gm to 25 gm.



Driving ahead in the blended spices segment

→ Company and brand profile: **Prakash Spices Pvt Ltd.** is known for its superior premium quality and huge line up of spices products. The company puts great pride in its sourcing capability and offering its customers top notch premium quality products. It has carried out backward integration and does exclusive contract farming with selected farmers in specially identified regions that are best suitable for a particular crop. By incentivizing farmers for cultivating exclusively for it, Prakash Spices is able to ensure the highest quality of seeds and manure used by the farmers. Its team also regularly visits the mandis and participates in live auctions where it is able to handpick the lots that match its quality standards. It ensures that all raw materials tested at labs for final scrutiny before being sent to the processing plant.

Product portfolio: Whole spices, powdered spices, the largest range of blended spices with more than 40 variants.

Brand USP: Prakash Spices products help make complex dishes and preparations easily at home. The brand offers gourmet spices bundled with its premium quality, which gives it a market edge. Its recent product additions include piri piri seasoning and cheese popcorn seasoning,



“ While the growth of basic whole and powdered spices has been constant, we have seen exponential growth in the blended spices segment and expect to see this segment grow even more as we plan to introduce more variants and expand the portfolio with new and unique products.

– Saurabh Nowal,
Director, Prakash Spices Pvt Ltd.



“ More and more consumers are switching to blended spices for the ease that they offer in making restaurant style dishes at home without the hassle of adding separate ingredients. With our products, we aim to simplify the lives of our customers as much as possible.

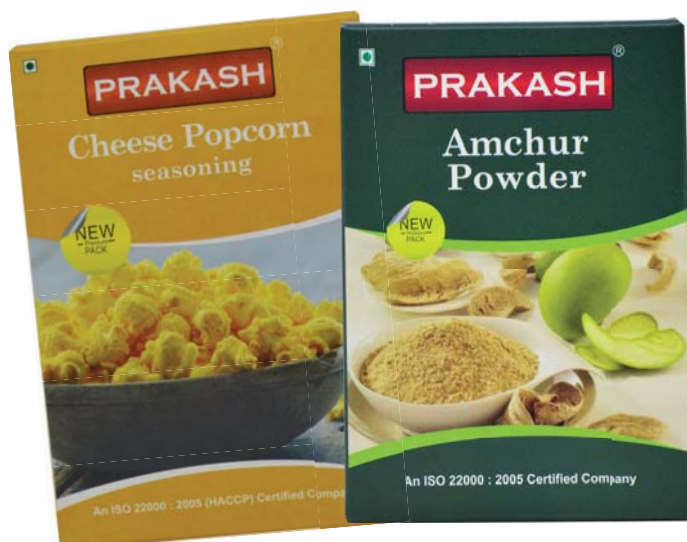
– Raunak Nowal,
Director, Prakash Spices Pvt Ltd.

which have been received well by its customers and have attracted good reviews and repeat purchases from its client base. Also, its blended spices are curated with utmost care to keep the flavor of the dish as authentic as possible.

Market opportunity and growth strategy: As majority of the consumption is currently unbranded, the company sees an opportunity for branded players like itself to convert customers by positioning its products well and making them switch to its products. At the same time, the company keeps an unwavering focus on the premium quality of the products which, combined with the uniqueness of their taste and aroma, are spurring impressive growth for the company. It is also

focusing on the packaging aspect so as to maximize the shelf life and increase the visual appeal of the products.

Retail approach: With its huge product line up, it is not possible for the company to position each of its product in every outlet because of shelf space issues. So, its sales executives and merchandisers carry out a survey and position the products that have more traction in that particular area, keeping in mind the demographic factors. Prakash Spices is stronger in the GT segment and is currently focusing on increasing its MT presence. It also sells its products online and with each order that goes out, it gives away free samples of products other than what the customer has ordered. The strategy has helped the company win repeat orders from customers and also in attracting new orders for the products that it gives as free samples. It also runs its own company owned outlets where it conducts live sampling of its products paired with particular dishes.



Offering culinary solutions with diverse product offerings

→ Company and brand profile: Goldiee Group is serving its consumers with a big range of spices under brand Goldiee. The company, since its inception in 1980, enjoys a legacy of working for several generations in the spices segment as well as other food products. There is something about the personality of the brand that evokes ethical values – a quality that has been tested over the years since its inception.

The brand is amongst the top players in the food and grocery sector in the country, in terms of both volume and value. Goldiee has a wide range of spice products spanning from basic and whole to a variety of formulated or mix masalas and products from regular blended spices to new range of chaunka/tadka masala, kadhai masala, etc. As a brand, Goldiee has been engaged with the industry to ensure a healthy environment for working together and to grow the category. The

company is focused on offering culinary solutions oriented towards General Trade, Modern Trade and HORECA.

Best-selling products: Garam masala, chola masala, shahi paneer masala and sabji masala. Goldiee hing commands very good acceptability amongst consumers and has been getting a good market response.

Product innovations: The company believes that the trend is already changing towards Ready to Cook. The requirement of more output in less time and the demand of 'New' has compelled chefs of today to innovate and the company's R&D is working to bring something new to its consumers on that front.

Research and Development is an integral part of the process at Goldiee Group. It has a team of technical people dedicated to researching the ingredients and finding newer variants for the needs of consumers of the future. With so many packaging innovations breaking out around the world and with rising concern for pollution and waste management, the brand is engaged in finding solutions around those issues as well. It makes use of the best machines and equipment available for grinding and packaging.

Apart from that, Goldiee has a fully equipped lab where each batch is tested on parameters such as volatility of oil, non-volatility of oil, crude fiber, etc. The brand is progressing towards finding the solutions to more efficient processes and is committed to using cool grinding and

cryogenic grinding for its products in future.

Market outlook: Goldiee believes that though there are many big regional players, there is still no undisputed national player since India is a diverse country with different cultures and palates. It is of the opinion that the biggest national player still is the unorganized sector but this trend is definitely changing with more awareness growing at all levels and trust growing towards the branded products in FMCG even at Tier II, Tier III and IV cities.

Marketing strategy: Besides its ongoing innovations to offer products that guarantee more efficiency and provide better outputs in lesser time, Goldiee is ramping up its brand visibility nationally. It has recently signed Salman Khan as brand ambassador. The brand's new marketing campaign emphasizes familial bonds and celebrates relationships by promoting the slogan "Aaiye Rishtey Banayein". The company believes that the concept of meal is always centred around relation building and strengthening the bonds amongst friends, family and relatives.

Roadmap ahead: Goldiee is in the process of setting up a state-of-the-art plant and is expanding its capacity to serve customers with even better quality products. With its new campaign, the brand is confident of expanding its reach Pan-India.



Our core value in innovation is how to provide the consumer a product that solves his daily needs without much impact on the price. During product innovation, the idea is to how to use the best quality ingredients that will give him/her exactly the taste of the dish of a best restaurant or by a chef of choice

– Sudeep Goenka
Director, Goldiee Group



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Grabbing the opportunity in organic

→ C Company and brand profile: Nimbark Organic is based out of Jammu & Kashmir but the brand is present in all the metro cities and has a very good presence in north and south India. The brand enjoys a reputation for organic farming in Jammu and Kashmir where it originally built a formidable customer base for its products on the basis of working only with certified organic farmers. It has now chosen to spread its wings and cater to its growing domestic as well as International consumers with healthy organic food products through its own dedicated retail chain of Nimbark stores. The company has already established four exclusive Nimbark Organic & Natural stores in J&K and will add 15 more retail stores in key locations across India by 2020.

Product range in the spices category:

It has a wide range of organic spices – Kashmiri mirchi (whole, flakes & powder), saffron, Kashmiri kahwa, and a full range of blended & whole spices. It will soon be coming out with its seasoning products as well.

Brand USP: With its base in Jammu & Kashmir, many of its products are pure Kashmiri produce – saffron, red chilli, ginger, jeera, among others – which is one of its USP. The company tests its products on 186 parameters to ensure the products are pesticides and chemical free. The company procures raw material direct from crop-specific farms and adheres to the strictest, protocols to check against pesticide residues and other chemicals. All products are stored in a hygienic and CO2

“



Quality is the most important and foremost thing for us and we strive to give the best of that. Our standard practices ensure the utmost quality of products and we test each of our product on 186 parameters for pesticides and chemicals before releasing it for CO2 fumigation and cleaning

– Rohit Gupta
MD, Nimbark Organic

Sourcing method: The company procures directly from certified organic farms, which are known for particular crops. It also works on crops-specific areas and farms. For example, some crops enjoy a better reputation in Kashmir and so the company procures them from the State. Likewise, it procures from other states like Rajasthan known for some special produce. The method ensures that the company is able to procure the best produce and raw material directly from the source and is able to deliver the best quality products and sustain the belief of its valuable consumers.

Market opportunity and growth outlook:

The Indian spices market is projected to reach approximately USD 18 billion by 2020 with growth in the sector expected to be led by branded spices and spice blends. The company believes that the market is very fresh for the organic segment and with very few ruling players, there is a huge opportunity to grow and grab the opportunity. India's organic food market is anticipated to grow at a CAGR of over 25% during 2016-2021 as a result of the growing health-consciousness of the people regarding the increasing use of synthetic chemical, fertilizers and pesticides in non-organic products.

Nimbark is currently growing at a CAGR of 30-35%. Its target is to maintain this growth rate in the future, both in terms of turnover as well as new products. The company is working to expand its supply operations in many countries other than the USA, the UAE, Russia, and Europe besides looking out for more global exposure and further expansion. To capture new markets, it is looking forward to setting up marketing offices overseas.

fumigated environment for infestation control. The use of advanced practices ensure that all products retain the optimum level of potency. The products are stored in a dry, sterile environment to prevent chances of any contamination. It also has a specialized mechanism in place to preserve the nutrient values of all the products by grinding them at low temperatures.

Nimbark is certified as per USDA (NOP/National Organic Program) European and Indian Organic Standards (NPOP/ National Program for Organic Production) and follows the standard practices of FSSAI and Jaivik Bharat.



Retail strategy: Nimbark Organic is present through most modern trade and e-commerce platforms in the country. It is coming up with a very good budget for advertisement and branding through ATL and BTL activities so as to create mass awareness about organic products and to expand its business to the next level. It is also looking forward to launching its products on a Pan-India basis, which will boost its top line. **PG**



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BIGGER, BOLDER, BETTER

2018 was the year grocers truly upped their tech game like never before. Expect even more next year.

Grocers have long been the laggards in the retail technology game. That's understandable, given the channel's longtime traditional nature, narrow margins and reluctance to make huge investments in risky areas.

Take a look at what's happened over the past year, however, and you'll see that grocers have made tremendous strides and are laying the foundations for further technological advances in the coming year. This year alone saw several tremendous innovations adopted, including, but not limited to:

Cashierless, Scan-Free Shopping

Amazon debuted the Amazon Go format to the public in Seattle and has since expanded it to several stores in such cities as Chicago and San Francisco, with 3,000 locations planned to open over the next few years. The chain uses "just walk out" technology, which employs computer vision, sensor fusion and deep learning to automatically detect when products are removed from, or placed back on, shelves. Shoppers scan in via a dedicated app, just walk out upon taking everything they wish to buy, and then receive a digital receipt afterward. Other



similar grab-and-go stores that have opened in recent months include Standard Market, powered by artificial-intelligence company Standard Cognition, and a concept powered by the Zipkin checkout-free software platform, both in San Francisco.

Robots

Midwestern grocer Schnuck Markets expanded to at least 15 locations its in-store autonomous-robot pilot in which Tally, an innovation from Simbe Robotics, traverses the store to detect out-of-stocks, pricing errors and even hazards. This frees up time for in-store associates to handle more important, customer-facing tasks. Other grocers employing similar technology include Ahold Delhaize USA at its Food Lion, Giant and Martin's stores, and Target.

Automated Fulfillment

The Albertsons Cos. revealed a plan to automate and save ecommerce fulfillment costs by embracing robotics and artificial intelligence (AI). The grocer is partnering with Waltham, Mass.-based grocery technology company Takeoff Technologies to help simplify the online grocery shopping experience through a "hyperlocal" automated fulfillment center, which also helps lower order-assembly and last-mile costs. The news follows similar announcements from the Kroger Co. and Walmart.



Autonomous Delivery Vehicles

Kroger began piloting a grocery delivery program that uses autonomous vehicles to fulfill online orders, teaming with autonomous-vehicle provider Nuro to make the convenience of grocery delivery accessible and affordable for customers everywhere. Through the partnership, which began in Scottsdale, Ariz., customers using Kroger's ClickList grocery ecommerce system and Nuro's mobile app place same-day delivery orders, which are fulfilled by the latter's fleet of on-road autonomous vehicles. Other grocers entering the autonomous delivery space include Walmart, through a partnership with Ford; AI-powered Bay Area "micro-grocer" Farmstead; Oklahoma City grocer Buy For Less; and Robomart, another Bay Area ecommerce grocer.

This short four-point list doesn't even include what grocers have been doing in terms of developing, employing or expanding mobile-centric shopping experiences; voice ordering; shoppable recipes; boosted searches for CPG partners; and more. Simply put, in 2018, there was far more news in the field of grocery technology than ever before. That means there will likely be even more news in 2019.

While we can't tell you every single activity to expect from each grocer, Progressive Grocer's editors have picked five key areas to keep close watch on, so you're ready for when the big stories do arise.

Read on to learn more ...

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Elevating the human experience, the desire for greater levels of convenience in our lives, and the convergence of accelerating technology will frame the “what’s next?” for retailers

Seamless 2.0

Omnichannel retailing will become increasingly automated. Grocery retailers playing in the physical and digital realms aspire to deliver a seamless shopping experience that provides consumers with a real-time view of stores and their contents, regardless of whether shoppers enter through a brick-and-mortar or mobile portal.

Retailers headed in the right direction include Albertsons, which recently launched a new ecommerce platform that leverages digital to enhance its physical operations, and Kroger, whose partnerships with Ocado and Instacart, adoption of voice-assisted ordering technology, and piloting of autonomous delivery vehicles have made the company an industry leader.

But what still needs to be done to streamline the omnichannel experience? What’s coming in 2019 that’s yet to be revealed?

Getting Up to Speed

“CPG companies and grocery retailers may want to think about next-generation capabilities that converge digital and physical marketing and online/offline purchases,” says Andrea Bell, principal with New York-based Deloitte Consulting.

Deloitte research found that one-third of people surveyed feel that digital tools make grocery shopping easier, versus 42 percent across other retail categories, Bell notes. “But there is an upside for the grocery retailers who take the lead in building the interaction and experience that people already expect from other categories,” she says. “Another reason to create more interaction points along the customer’s journey is that people who use their devices tend to spend more than those who don’t, making this an attractive segment for retailers to pursue.”



Kroger began piloting grocery delivery that uses autonomous vehicles by Nuro to fulfill online orders.



Elevating the human experience, the desire for greater levels of convenience in our lives, and the convergence of accelerating technology will frame the “what’s next?” for retailers, according to Steven Duffy, VP of grocery for Boston-based design firm Cuhaci & Peterson.

“Next steps include digital interfaces through omni-consumer engagement, including mobile-friendly interconnectivity, gamification of the retail experience, personalized mobile apps, increased use of video/information-rich-based content, e-learning/m-learning or short nuggets of info consumed on the go, in or outside of the store,” Duffy says. “Many ‘future-gen’ grocery elements are now operational in Asia, chiefly China’s adoption of mobile technology that is the primary means to deliver on this new experience. Both Hema and 7-Fresh are noted as leaders illustrating myriad artificial intelligence (AI)-enabled technologies not yet operational in the U.S. They include advances such as barcoding products, smart shopping carts, co-bots to assist and robotics for logistics.”

Pallab Chatterjee, chairman and CEO of Dallas-based Symphony RetailAI, suggests that grocers could learn a lot from other industries delivering a seamless experience, such as food delivery or ride-sharing services.

“Right now, the click-and-collect experience of getting groceries delivered to your home is not as user-friendly or continuous,” Chatterjee asserts. “With an app like Uber, you can actually see the car’s relative distance on the app as it heads your way. Similarly, with Grubhub or DoorDash, you have an expectation that food will be delivered within the next hour or so, and can track your order as the food is prepared, picked up and brought to you.”

Notifications and real-time updates are key to a seamless user experience, he notes, “and grocery needs more of this. In grocery delivery, there are still uncertainties of when a click-and-collect order will be ready, which obviously has negative implications for certain fresh or frozen items. Given this, retailers must be able to provide continuous, precise updates and offer regular connection with the order along the way.”

Mark Hardy, CEO of Chicago-based InContext Solutions, says that the first thing retailers need to do is stop thinking about digital and physical commerce separately, a perspective usually driven by their internal corporate structure.

“Retailers need to look at the commerce experience from the eyes of the shopper, where there is no division between the two, and look to facilitate the easiest and most engaging path to purchase,” Hardy observes. “This will require that retailers have the right technology solutions in place to make sure both the online and in-store experiences are aligned, agile and personalized. This means understanding

what shoppers are looking for and being able to incorporate that seamlessly into other channels. Fast changes, test and learn, and introducing innovation are easy and low-risk online, but are costly and time-consuming to do in physical stores. Solving for this challenge in brick and mortar changes the competitive nature of the retailer.”

To get there, retailers should adopt “mixed reality,” which encompasses both virtual-reality (VR) and augmented-reality (AR) technologies, “because it truly is the way the world is headed,” Hardy says.

“In addition to the many customer-facing applications that are finding success in brick-and-mortar retail, such as AR apps, the business-facing side of mixed reality is really taking off,” he continues. “Current physical processes applied in areas such as category management only allow us to review categories once — maybe twice — a year; you have to schedule time in the innovation center, and maybe run an in-store test to provide limited sales data from which retailers have to make a go/no-go decision. Mixed-reality technologies allow rapid simulations and testing with real shoppers that quantify the impact on sales and shopper experience.”

Integration of physical and digital platforms is a must, Symphony RetailAI’s Chatterjee says. “The critical element here is the ability to have inventory and price visibility across all channels,” he says. “Secondly, retailers need the technology to support pickers or transporters having their own version of a digital app. You see this with Uber, as the drivers have a different interface than what customers can see. That part of the technology for grocers is not enabled in most of the digital experiences today.”

What the Near Future Holds

What can we expect omnichannel to look like in 2019 and beyond?

“In the next two to five years, we’ll see roughly 70 percent of grocery shopping done through mobile or digital channels,” Chatterjee asserts. “Although the percentage of shoppers doing this now is quite small, its growth will be very, very fast. And ultimately, the digital delivery experience will dictate which retailers will win.”

Additionally, subscription services will grow to perhaps half or more of total digital orders, Chatterjee predicts. “Amazon does a lot of this, but others are not realizing the opportunity yet,” he says. “That needs to change.”

InContext Solutions’ Hardy predicts expanded use of head-mounted devices (HMD) for VR beyond Amazon’s recent Prime Day mall kiosk tests. “Next year, HMD are expected to have self-contained processing power, which allows them to be untethered from a PC and sold at lower price points,” he says. “This makes the hardware more

affordable and portable for consumers, which should be the tipping point for adoption.”

Cuhaci & Peterson’s Duffy says that in less than two years, both large and limited smaller grocers will have operational digital stores. “Mobile commerce, or m-commerce, is an evolutionary next step for ecommerce. It acts as an accelerant to convenience... [and] convenience equals conversion,” he says. “Fully autonomous and reliable deliveries in all conditions won’t occur any sooner than three to five years.”

Micro fulfillment, according to Duffy, is “an excellent example of jumping to the next curve. It harnesses enhanced robotic picking through AI-enabled computer vision, machine learning and advanced sensors, reducing human labor. While still in the early stage of development, it holds the promise of a rapid means to transform the image and function of conventional grocery. ... Leveraging robotics for an array of stocking, scanning and logistics needs will become more prevalent in the back-of-house and sales area, and will enable the enhanced use of human labor for the sales experience.” **PG**



Retailers should adopt “mixed reality,” which encompasses both virtual-reality (VR) and augmented-reality (AR) technologies.



what's next

◀ **Cornitos launches its on-the-go range nachos**



Cornitos, from Greendot Health Foods Pvt. Ltd, is introducing consumer friendly “On the Go” Nacho Crisps and Dip packs. It comes in an easy to peel off tray with separate compartments for the Round Nacho crisps and Salsa dip to make the consumer experience better.

On the Go pack is available in two delectable flavours – peri peri and jalapeno. Cornitos Nacho crisps is a healthy snack as it is gluten free, made in corn oil, is cholesterol free and non GMO. Salsa dip is made with fresh tomatoes to keep the palates of the audience content. The price is Rs. 60 for a pack with a net weight of 75 gm, which has 45 gm of Nacho Crisps and 30 gm of Dip.



◀ **Start a healthy life with NatureFresh Acti-Heart**

NatureFresh, the home-grown brand of Cargill’s oils business in India, has launched NatureFresh Acti-Heart. Packed with the goodness of Omega 3 that fights inflammation and provides a healthy lipid profile, it also has the ideal Omega 6/ Omega 3 ratio, as stipulated by National Institute of Nutrition. NatureFresh Acti-Heart is available in 1 ltr bottle priced at Rs. 175. It is also available in 1 ltr pouch priced at Rs. 175 and in an environmentally friendly 5 ltr recyclable tin packaging priced at Rs. 829. The new offerings are available across e-commerce platforms, and across Modern and General Trade outlets in India.

▼ **Hielo Pear beverage launches premium juices**



Premium beverages and food brand Hielo Pear Beverages India has introduced a range of premium juices available in multiple flavors such as Alphonso mango, orange, litchi, pineapple and peach, with each one offering a dose of good health. Containing fruit pulp and no artificial sweeteners, the juices are an embodiment of pure health. Available in attractive packaging of the size of 240 ml, each juice is a rich source of multiple vitamins and contain a high percent of fruit pulp. The juices are available in the price range of Rs. 60 for 240ml at all leading grocery stores in Delhi, Rajasthan and Punjab.

▶ **D-Alive launches sauces and salad dressings for diabetics**

D-Alive Health Pvt. Ltd. has introduced sauces and salad dressings, especially designed for diabetics, and made with 100% natural ingredients. The four variants are: khatt-mith tomato ketchup, sweet sour chilli sauce, sweet sesame vinaigrette, and hot & sweet pickle vinaigrette. The sauces are priced Rs. 250 to Rs. 499 for a quantity ranging from 270 gm to 280gm. The products are available across India on Amazon.in, and in select retail stores in Mumbai.



▶ **Marico introduces Saffola FITTIFY Gourmet, a healthy gourmet range**

Marico has launched one-of-a-kind healthy gourmet products under ‘Saffola FITTIFY Gourmet’, created by nutritionists and curated by celebrity chef Kunal Kapur. The healthy gourmet product portfolio currently comprises an interesting range of Hi Protein Meal Soups and HI Protein Slim Meal Shakes containing a blend of five superfoods – moringa, quinoa, buckwheat, amaranth and turmeric along with an array of exotic and delicious flavors. The new range is available at Modern Trade outlets – Godrej Nature’s Basket, Foodhall and Star Bazaar stores across Mumbai, Delhi-NCR, Pune, Hyderabad and Bangalore; and on e-commerce portals –Amazon, Flipkart and Bigbasket. Consumers can get a hold of HI Protein Meal Soups at INR 375 for a box of 4 sachets/servings (4X53g) while Hi Protein Slim Meal Shakes are priced at INR 1,190 for a box of 12 servings (420g).



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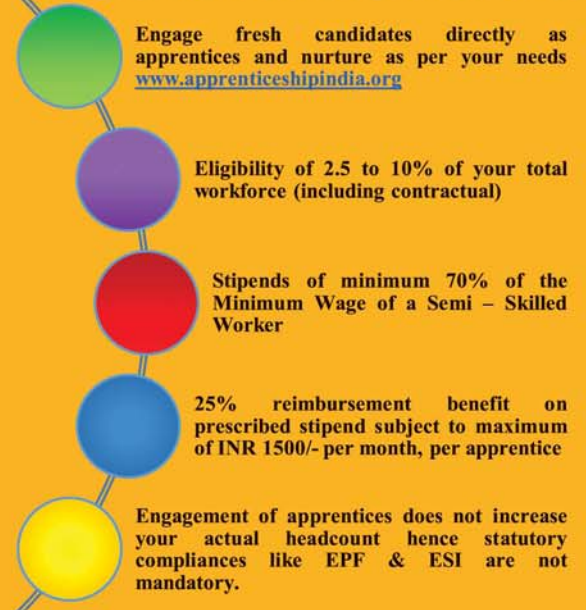
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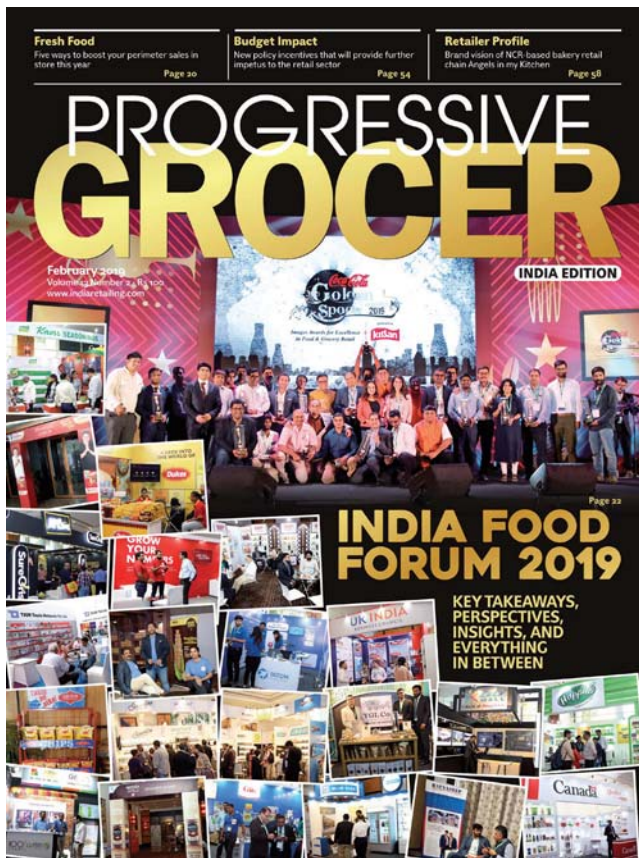


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MAY 2019 BEVERAGES: To make consumers respond enthusiastically, retailers and brands are taking to more creative combinations within the category.

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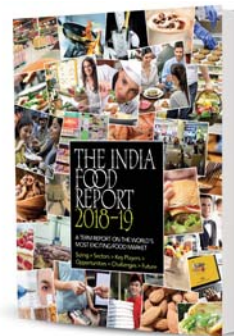
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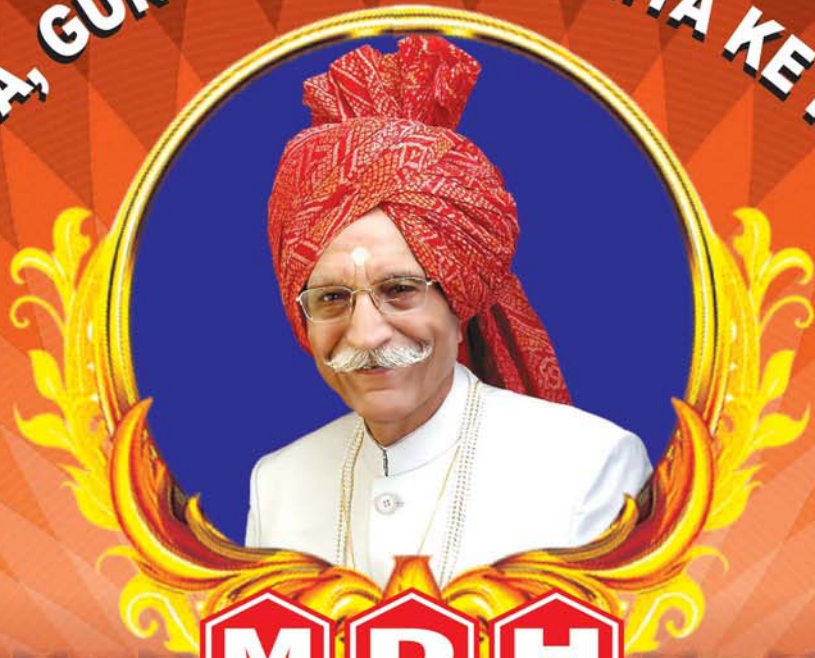


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