

Organic Food

Though still a niche concept, sales are currently at around \$200 million annually and growing 30-40% each year. **Page 14**

Supply Chain

The weak links in supermarket supply chain – ordering, replenishment and delivery – need shoring up with smart technology. **Page 18**

Private Label Outlook

Retailers must up the ante by embracing new across the board, including products, merchandising and promotions. **Page 60**

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INDIA EDITION

Page 24

"OUR FORTE IS GOOD LOCAL KNOWLEDGE OF THE CATCHMENT AND EXCELLENT PRODUCT MIX"

— SURESH MITTAL
OWNER, RAJMANDIR SUPER MARKET, DELHI

FROZEN FOOD

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For both brands and retailers, Frozen Food offers a great potential for value-addition and growth. The category is undergoing a rapid transformation with the consumer looking for value-added ready-to-cook/bake/grill products.



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The grocery sector has seen shopper habits shift to more frequent, shorter trips, versus large weekly hauls. As a result, grocers are focusing on developing smaller-format stores, those under 10,000 square feet, with more local offerings to appeal to the surrounding community. Indeed, smaller-format stores are back in vogue and going ahead we expect to see even more grocery stores rolling out their smaller-format stores as they battle razor-thin margins in prime locations while still serving evolving consumer needs.

Also, the growth of smaller stores will accelerate business-model innovation in the grocery industry. Expect that successful new stores will be fundamentally different and built to be economically viable in serving specific trip missions.

Those that succeed won't just be smaller, they will operate differently. Grocers haven't totally abandoned the grand experience, however. Bigger hypermarket formats, too, will continue to thrive as giant temples of food, in select locations and will continue to offer expertly curated products in each department. So, the truly progressive grocer knows that it's not all one way or the other. Just as a combination of brick and mortar and e-commerce is likely to be a winner, so is the retailer who knows just what type of store to put where.

Going ahead, retailers will have to actively keep reassessing store footprints, and reconfiguring square footage to accommodate e-commerce growth. In the end, it's innovative ideas and trend-setting products that will keep driving store sales.



Amitabh Taneja
 Editor-in-Chief

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COVER STORY

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“OUR FORTE IS GOOD LOCAL KNOWLEDGE OF THE CATCHMENT AND EXCELLENT PRODUCT MIX”



SURESH MITTAL
Owner of Rajmandir
Super Market

Rajmandir Super Market, which operates 10 stores in Delhi, has been continuously expanding its presence with the objective of building a network of neighborhood stores and offering the freshest and finest food experience to the consumers.

32 GETTING FRESH AND FLAVORSOME WITH FROZEN



The frozen food category in India presents an interesting opportunity for both brands and retailers owing to its great potential for value-addition and growth. Frozen food is undergoing a rapid transformation with the consumer looking for value-added stuff like ready-to-cook/bake/grill products. With consumers looking for convenience, hygiene and quality products, and willing to spend on them, the shift to refrigerated and frozen foods is unstoppable. Frozen food companies can break through with innovation across different levels.

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Frozen Foods



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Retailers must introduce new products, merchandising and promotions



From staple to gourmet: Transformation of tea consumption in India



Indians are beginning to explore tea beyond the staple 'masala chai' and experiencing as well as demanding teas that cater to various tastes and seasons. Green tea has already become widely popular as a healthy drink and now there is a rising interest in exotic, artisanal and gourmet teas as well.

By Ambarish Ghosh

Tea is integral to the contemporary Indian culture. For Indians, it is not just a drink but the most consumed concoction, outnumbering its rival coffee, by 30 cups to one. With such a massive scale of consumption, Indians might feel that they know their tea. However, there is much yet to be discovered about this staple.

The high consumption of this beverage in the country is driven by several factors, including the presence of a huge tea-drinking population. It is the drink of the masses, fueling hundreds of millions of Indians, right from the time they get up in the morning till when they go back to bed. They drink tea to relax and enjoy some family time, or while they hang around with friends and visitors. Tea gives a boost to the concentration levels and can be consumed in any weather. As a culture, the way we consume tea is undergoing a transition from the simple concoction of water, milk, sugar and tea leaves.

A change is here

The globalization of our economy and opening up of the Indian market to the world has not only transformed the country's financial landscape but also significantly altered lifestyles. Today, we are constantly interacting with diverse global cultures,



and it goes without saying that this has also influenced the way we drink our tea. India is quickly catching up with the elaborate and formal tea traditions around the world, like the 'high teas' of England or the 'tea ceremonies' of Japan, where it is not just a casually enjoyed habit, but a carefully considered statement of taste and refinement.

We may also not be as artistic in presenting tea as a work of culinary art, in the manner of our East Asian neighbours. However, Indians are beginning to explore tea beyond the staple 'masala chai' and experiencing as well as demanding teas that cater to various tastes and seasons. Green tea has already become widely popular as a healthy drink and now there is a rising interest in exotic, artisanal and gourmet teas as well.

Today, tea is not only positioning itself as the classy alternative to coffee, but also doing the unthinkable by taking on the 'sherbet' that is



“We see a huge potential for granola bars in the metros and Tier-1 cities”

We believe that in the next five years, when customers think of snacking items such as biscuits, namkeens, candy bars etc., granola bars will be an inevitable part of their choice. To achieve the same, we are actively investing in brand building and customer awareness.

Kanupradeep Subramanian, CEO & Director, WIMWI Foods, spoke to Progressive Grocer about how his granola snack bars that sell under the ASAP bars brand has been able to break through the market clutter and become a favorite of the young millennials looking for quick, tasty and healthy snacking.

Tell us about your company and products.

We started WIMWI Foods just after graduating from IIM-Ahmedabad from the Centre for Incubation, Innovation and Entrepreneurship (CIIE) in March 2014. The idea was to bring innovative, tasty and healthy foods from across the world in convenient formats and prices to India. ASAP (As Simple As Possible) granola or snack bars was launched in 2016 in three flavors – almond & dark chocolate; fruit & white chocolate; almond, cashew & caramel. ASAP bars are designed for the young millennial crowd looking for quick, tasty and healthy snacking on-the-go and for mothers looking to give their children a healthy and trustworthy snack during the day.

How would you describe your product's USP and market differentiator?

The main philosophy behind ASAP bars brand was to break free through the clutter of complicated ingredients, which goes into making FMCG food products these days. With the aim of bringing a simple, healthy and yet tasty food, ASAP bars are made with high quality ingredients like rolled oats,

almonds, cashews, dried fruit, which customers know is healthy for them. Our product's taste, affordable price point (Rs. 30) and differentiated packaging are our three key market differentiators.

We have no added preservatives and colors and yet have a shelf life of six months through packaging innovation. Often consumers believe that health foods taste like cardboard and we are trying to break that paradigm and make healthy foods taste awesome. Customers, especially millennials, love our product's taste. We have come up with an innovative see-through packaging through which customers can immediately know what the ingredients are. One can check out our Instagram profile to know what customers love about the brand and product at [instagram.com/asapbars/](https://www.instagram.com/asapbars/)

Which are the key markets and customer segments for your products and which are the new markets you are looking to enter?

We have a national presence through Amazon and Flipkart as well as other online marketplaces such as Smytten, 1Mg, etc. We have MT, Institutional & GT presence in Bangalore, Hyderabad, Pune,

Culture Shift

In search of the next Greek-style success, manufacturers look to new ingredients, packaging.

By Lynn Petrak

“Yogurt is looking for a pocket of growth that they can latch onto, and that leads to a question in Greek and traditional yogurts: ‘What do we do next?’”

— Darren Seifer
The NPD Group

The term “live and active” may just as easily apply to innovation in the yogurt category as it does to living organisms used in the product’s fermentation process. On the heels of continual expansion and innovation — which started several years ago with kid-centric yogurts and has continued over the past few years with Greek yogurts — the marketplace remains intriguing both for those on the R&D side and those who consume yogurt.

That innovation, according to some experts, arises from the proverbial necessity of invention. “Yogurt is an interesting segment right now, because after two decades of growth in consumption, there is some plateauing,” observes Darren Seifer, food and beverage industry analyst for The NPD Group, based in Port Washington, N.Y. “Yogurt is looking for a pocket of growth that they can latch onto, and that leads to a question in Greek and traditional yogurts: ‘What do we do next?’”



Industry research bears out a certain leveling off within the category. According to data from Chicago-based market research firm IRI, total sales of yogurt reached just over \$7.4 billion for the last 52 weeks ending Sept. 10, a 2.12 percent decline from the previous year. Within the category, Greek yogurt remains strong: Greek-style yogurt sales are projected to grow 9 percent globally, with moderate growth in the U.S. market, according to a recently released report on yogurt from London-based Technavio.

Beyond Sweet

One pocket of potential growth may be in yogurts that aren’t flavored with traditional sweet ingredients like fruits. “Some manufacturers are trying to get into savory, and there are good reasons for that, because Americans are concerned about their sugar intake,” notes Seifer. “Seventy percent of adults say they want to cut back on sugar consumption.” He cautions that a gradual introduction may be needed for real growth to take off, given the fact that savory yogurts are so different in taste from sweet varieties.

Niche brands have already introduced savory items to the market. Blue Hill Yogurt, a brand that sprang out of the Blue Hill Restaurant in New York City, offers vegetable-based yogurts in carrot, sweet potato, beet, butternut squash, tomato and parsnip varieties, made with milk from 100 percent grass-fed cows. Meanwhile, Sohha Savory Yogurt, also of New York, which temporarily halted production last summer, is planning to get “back up and running in 2018” with a product line including such flavors as tangy sea salt, according to co-founders Angela and John Fout.

Global Inspirations

Another take on nontraditional yogurt flavor comes from Torrance, Calif.-based Morinaga Nutritional Foods, which has introduced an aloe-flavored yogurt called Alove. The first yogurt of its kind sold in the United States, the Japanese-style product combines yogurt with the tender parts of the aloe vera leaf.





Private Enterprise

Innovation is the watchword as the store-brand sector continues to evolve.

By Bridget Goldschmidt

As private label rises in popularity with U.S. shoppers and becomes an ever more ubiquitous part of the American grocery experience, food retailers must up the ante by embracing what's new across the board, including products, merchandising and promotions.

"One of the biggest trends we are seeing in private brand is the shift from imitation to bold innovation," asserts Nicole Peranick, senior director, retail transformation at Stamford, Conn.-based Daymon, a provider of global retail strategies and services. "Retailers are increasingly acknowledging that private brand is more relevant than ever to their strategy for success."

The reason for this is that a superior private label offering enables a grocer to stand out from the pack. "Daymon's research shows that on average,

98 percent of a retailer's national-brand assortment is the same as its competition, leaving nearly all differentiation up to private brand," notes Peranick. "Add to that the fact that consumers continue to reject the notion that national brand is best — with 85 percent saying they trust private brand just as much and 81 percent saying they buy private brand on every shopping trip. As a result, we are seeing the balance of power shift to private brand."

Doug Baker, VP, private brands and technology at the Arlington, Va.-based Food Marketing Institute (FMI), agrees that store brands are a key way for grocers to outstrip their rivals: "A retailer's private brand is its point of differentiation." He goes on to note that among the trade organization's members who participated in "The Food Retailing Industry Speaks 2018" report, "retailers plan to make growing investments in this business segment, with many



A Look at Men's Online Grocery-Shopping Behavior

To attract male shoppers to grocery ecommerce, retail brand marketers should highlight the platform features that provide convenience, such as quick reorder, subscribe and save, and last-mile fulfillment.

By **Diana Medina**



With more men living alone, leading single-adult households with children or taking on their full share of family responsibilities, males are emerging more and more as the primary purchase decision-makers and shoppers

While it's understandable that long-established gender-marketing paradigms are influencing current ecommerce engagement strategies, simply

presuming that men's online shopping activity mirrors their brick-and-mortar behaviors could cost retailers, big time.

Inmar Analytics recently surveyed 2,000 online grocery shoppers to better understand their motivations, major concerns and overall mindset when it comes to purchasing their groceries online. The results make it clear that marketers should take a fresh perspective on who to target with ecommerce, and how best to meet their needs.

Bringing frozen delicacies from around the world

By Aliya Jamal



Alistair Cooke, Head of Sales and Marketing, Iceland International, talks about the increasing demand for frozen foods and the brand's expansion plans for India in the coming years.

Describe your company and its products?

Iceland foods, established in 1970 by Malcolm Walker, is a unique British food business with 900 stores across Europe and a global food export business spread across 40 countries. Iceland UK has a business of about 3.3 billion sterling, in total. Iceland Foods India Pvt. Ltd. is the Indian arm of Iceland UK and our products are available in all major premium retail outlets across Mumbai, Pune and Goa. We have introduced products in 3 major categories: 1. Authentic European Pizzas 2. Unique potato snacks 3. Mix veg and sweet potato fries in the retail market.

Which are the best-selling products?

Currently, we have a range of 10 SKUs and we look forward to introducing another 5 – 8 products over next 2-3 months. Our products are unique and the best-seller among them are the sweet potato fries, potato pockets, waffles and pizzas which contribute more than 90% of our sales.

How do you see the demand of your products growing in the future?

With growing awareness of global cuisine in India, there is definite affinity for source provenance and products made with authentic recipes. Consumers are not averse to paying premium for high quality innovative products. Also, with growing penetration for frozen foods, the term 'frozen' is no longer a taboo and is gradually finding greater acceptance amongst the masses in the urban centers. Factors like rapid economic development and a growing urban population, higher participation of women in the work force etc. are influencing consumers to

shift their dietary preferences towards ready-to-eat / cook food products. With a truly innovative and category building range, we see bright prospects for our brand in India.

What is your customer segments and markets?

Our key markets are in the metropolitan and Tier 1 cities. Mumbai, Pune & Goa have been coming out as a great market for the brand and we have better reach here. Currently we want to focus on consumers from SEC A in the top 15 cities in India, who primarily shop through organized retail channel.

What are the challenges and the opportunities facing this category?

The opportunities in the sector are increasing as the Indian consumers is becoming global travellers and have grown an appetite for global cuisine. There is increasing awareness among the consumers and the curiosity to try different products is also increasing. Our products have been accepted with a great response by Indian customers. The challenges in India are largely related to infrastructure. Availability of suitable storage space, temperature monitoring mechanism and cold chain led distribution network are key challenges.

What is your strategy for retail outreach?

We have partnered with almost all major organized retail chains in Western India and our products are also available in premium stand-alone super-markets as well as in online retail channels. We will continue to focus on developing robust partnerships with retailers as we are one of the few companies who is genuinely focused on developing and expanding the frozen foods category.

Please tell us about your future plans.

Currently we are focused on building our brand in Mumbai, Pune and Goa in west and we will shortly expand our presence to the top 15 cities in India. We would also want to increase the range of products available in the coming months. We are educating the consumer about new product categories in the frozen foods space through in store efforts and digital outreach. **PG**



Is it Time for Grocers to Adopt VR?

Grocery vet Bob Mariano offers 3 ways that tech boosts back-end efficiency.

By Randy Hofbauer

In recent years, virtual reality (VR) technology has often been associated with consumer-facing entertainment — such as the novel and upcoming film “Ready Player One,” or the Playstation VR system — but it’s finding increased potential to drive back-end efficiency in business, including brick-and-mortar grocery.

And while many believe VR is an idea to approach in the future, some see earlier adoption as a way to actually approach the future today. Renowned grocery veteran Bob Mariano — who helmed Chicago-area grocer Dominick’s and Midwestern grocer Roundy’s, and now sits on the board of VR technology firm InContext Solutions — is one of those advocates.

Chicago-based InContext offers the ShopperMX flagship SaaS VR platform through HIVE (Hi-Immersion Virtual Experience), which transports users via headset into a virtual store environment. This allows them to interact with products, shelf sets, store layouts and in-store displays to quickly simulate in-store concepts and obtain data-driven insights on customer behavior by testing concepts and simulations with live shoppers using the technology.

Mariano sat down with me to offer three areas where VR technology can help grocers improve performance:

Shopper intelligence: VR technology can take away estimation about how a new product or concept is going to perform, enabling new ideas and concepts to be tested and even fail without significant time and financial strain. Even a department or store redesign can be tested before anything is changed or removed.

“This allows the retailer and the CPG to really put their heads together and come up with iterations, and then determine how the consumer changes behavior

most effectively,” so the parties aren’t just repeating what they did the previous year, Mariano said.

Category management: As a broad analysis based on logistics, category management has had to do more with shelf supply than anything else. However, it’s only recently that the process is beginning to realize the importance of factoring in the shopper. Using VR gives category and brand managers real-time, accurate data to test real shoppers’ experiences and work toward a reality.

“If we’re trying to match a category to give us a 2 or 3 percent increase next year, [and] all we do is look back on what we did ... it’s a matter of luck then,” Mariano said.

Like Mariano’s experience, the first time I tried the technology, I felt like I was in a real Walgreens store, seeing everything designed as it is in one of the chain’s typical shops. So if the customer feels like she’s in a store she shops, insights into her reactions can be more trustworthy.

Planogram improvement: Grocers can determine how best to update their planograms by determining which categories should be adjacent, what customers are seeking and how to get shoppers down the aisle.

As an industry, “we really haven’t been doing a lot of work in terms of why consumers go down certain aisles, how heavy they shop, what do they look for,” Mariano noted. “That’s a whole area that is really underdeveloped in terms of knowledge of actually what makes a difference to the customer in terms of adjacency and things across the aisle from other categories.”

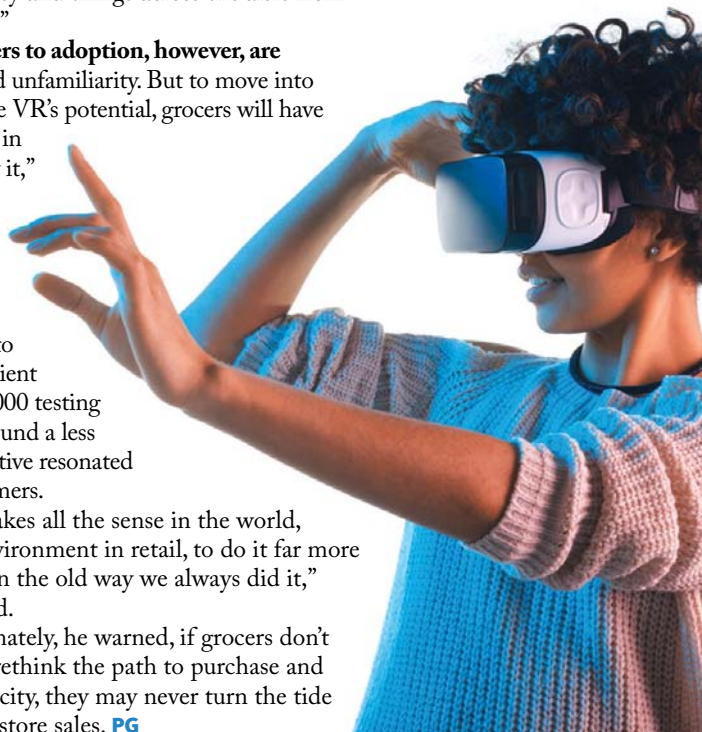
The major barriers to adoption, however, are twofold: cost and unfamiliarity. But to move into the future and see VR’s potential, grocers will have to “put their foot in the water and try it,” Mariano urged.

If VR reveals a way to cut costs, however, it could pay for itself. He points to one InContext client that saved \$880,000 testing a concept, as it found a less expensive alternative resonated more with customers.

“I think it makes all the sense in the world, given today’s environment in retail, to do it far more scientifically than the old way we always did it,” Mariano asserted.

Because ultimately, he warned, if grocers don’t embrace VR to rethink the path to purchase and consumer-centricity, they may never turn the tide of fading center store sales. **PG**

Grocers can determine how best to update their planograms by determining which categories should be adjacent, what customers are seeking and how to get shoppers down the aisle.



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