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WE PLAN TO OPEN 12 NEW STORES OVER THE NEXT 3 YEARS

— **TANIT CHEARAVANONT**
MANAGING DIRECTOR, LOTS WHOLESALE SOLUTIONS

KARI KARI

JAPANESE PREMIUM SNACKS

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How can grocery retailers develop comprehensive, consumer-driven approaches to health and wellness? Consumers want to meet all of their health-and-wellness needs in a single destination. That means convenience, coupled with a sufficient variety of core, niche and cutting-edge products. Savvy retailers anticipate health-conscious shoppers' needs and offer solutions-based in-store merchandising, adjacencies and complementary online shopping experiences.

Retailers need to be transparent and help provide answers to key consumer concerns, including where food comes from, the nature of ingredients, and how food is produced. As a point of differentiation, retailers should look beyond the path to purchase and focus instead on the path to healthy consumption by providing meal solutions that fit a healthy lifestyle.

They can showcase an authentic commitment to wellness via weekly circulars, store displays, healthy recipe ideas and prepared food offerings, better-for-you own-brand products and in-store samplings, and overarching messaging. This can be done by tapping into shopper data and tech engagement to target the right shopper with the right product at the right time. By becoming leading wellness destinations, retailers can ensure that they are able to better connect with the growing base of wellness-minded shoppers.



Amitabh Taneja
 Editor-in-Chief

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COVER STORY

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TANIT CHEARAVANONT
Managing Director,
LOTS Wholesale Solutions

“WE ARE LOOKING TO OPEN 12 NEW STORES OVER THE NEXT THREE YEARS AND PLAN TO INVEST OVER INR 1,000 CRORE WITHIN THE NEXT FIVE YEARS”

Currently, with northern India as its focus region, LOTS has three stores operating in Delhi-NCR and is looking to enter Haryana, Punjab and Rajasthan in the coming years and grow its current audience base multifold.

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Just say it and it's yours



32 A GROWING MARKET FOR NEW FLAVORS SNACKS



The growing demand for foods and beverages with unique qualities – natural, functional, energizing, satiating and convenient – are causing consumers, manufacturers and retailers to rethink the traditional snack category, with products continuing to evolve and lines increasingly blurring. Retailers and brands should join hands to promote snacks by helping consumer to shop better and buy products that suit their tastes. This can happen only with their combined efforts and will help pave the way to even bigger innovation in the snacks category.

50 PROFILES

Snack brands and their new flavor offerings



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Market Update

IKEA takes the next step in putting sustainability at the core of its business



Ingka Group and IKEA India are taking the next step in transforming the business by integrating sustainability in the core of the IKEA retail business. As part of that initiative, the Country Retail Managers will be overall accountable for implementing

the IKEA Sustainability Strategy – People & Planet Positive – in their respective countries. “I am excited and inspired by formally taking on the role of Chief Sustainability Officer. I have a greater responsibility to ensure that sustainability is integrated into everything we do as a business. It’s especially relevant for India and we have many ambitious plans. We have always had an inspiring vision and values, and now we are moving further and faster in demonstrating the connection between business success, long-term growth and our commitment to people and planet,” says Peter Betzel, CEO, IKEA India.

As well as working towards achieving science based targets to contribute to fulfilling the Paris Agreement, the company is committed to a range of initiatives in its 30 markets. “In India we will use 100% Electric Vehicles for our delivery services by 2025. Last year, the Better Air project was initiated with the goal of converting rice husks, which cause major pollution in northern India, into IKEA products,” said Betzel. The first part of these initiatives, called FORANDRING, will be launched this autumn on 1 September 2019.

To make the transformation to a low-carbon business, IKEA will transform into a circular business – moving towards recycled and renewable materials, designing all products from the very beginning to be repurposed, repaired, reused, resold and recycled, and providing the circular services supporting these flows; strive towards 100% renewable energy throughout the entire IKEA value chain; inspire and enable more than 1 billion to live a better everyday life within the limits of the planet. To become a circular business by 2030, IKEA has set several targets across the value

chain – All IKEA products will be made from renewable and recycled materials by 2030; All IKEA products will be circular – designed in line with circular design principles to be re-used, repaired, upgraded, and recycled from the very beginning. As part of this, IKEA will remove single-use plastic products from the home furnishing range and from customer and co-worker restaurants (Ingka Group) by 2020; all markets are testing new ways of meeting customer needs across how customers acquire, maintain and let go of products at the end of life cycle, with furniture leasing to begin with.



Peter Betzel, CEO, IKEA India

Center Fruit partners with Sony Pictures to introduce special ‘Spiderman – Far from Home’ Pack

Perfetti Van Melle India’s flagship brand Center Fruit has announced its collaboration with Sony Pictures. Spiderman: Far From Home, which was released on 5th July and since then the Spiderman frenzy is at its peak. As part of this association, facilitated by Group M, the brand has rolled a special limited-edition variant with Spiderman themed packaging to delight Marvel fans. The rollout of the new product is supported by a TVC in collaboration with Sony Pictures.

Speaking on the collaboration, Rohit Kapoor, Director Marketing, Perfetti Van Melle India, said, “We believe in refreshing consumer interest in our product categories with the introduction of contemporary offerings. Center Fruit’s collaboration with the Spiderman: Far from Home movie ensures high visibility amongst fans, while the new flavor adds another appealing dimension to the familiar taste profile of the product. We are certain that the new Center Fruit ‘Spiderman – Far from Home’ pack will strike a chord with our consumers across India and increase market resonance for the brand significantly.”



GOFRUGAL says it's time to Back up or Pack up

GOFRUGAL, a Chennai-based software product company founded by Kumar Vembu, has found in a study that 90% of businesses such as those of retailers and distributors are risking their business due to mismanaging the safety of their data. This study and the subsequent search for a viable remedy and a reliable solution has led GOFRUGAL to launch GoSecure – a timely solution for Indian businesses to back-up data on a real time basis.

GOFRUGAL, established in 2004, is a digital-first company offering cloud and mobile ERP solutions to retail, restaurant and distribution businesses. It helps businesses to embrace agility and transform digitally to stay competitive in the dynamic market. The company helps businesses grow with minimal staff, minimum skills along with 100% accurate and reliable solutions. More than 30,000 customers across 60+ countries experience simplicity in running their businesses with GOFRUGAL.

Its latest offering, GoSecure, is a real time Back-up as a Service (BaaS), which automatically backs



Kumar Vembu, CEO, GOFRUGAL

up every transaction to a cloud-based service in a highly secured way. The user can restore their data, without any technical support, with just an OTP.

At the launch, **Kumar Vembu, CEO, GOFRUGAL**, stated, “We were concerned about the sufferings of customers due to hard disk failure, database corruption and ransomware attacks. We felt the need to bring in the shift in responsibility from the customer side to the service provider, to provide 100% business continuity, and assured uptime. This first real time Back-up as a Service (BaaS), Do It Yourself (DIY) tool automates the data backup process by completely syncing it online every 3 minutes. It also ensures a seamless restoring mechanism for businesses of any size to revive the data from the cloud in real-time.”

METRO Cash & Carry India to celebrate its 16th anniversary with 'Impossible Deals' for 3 million SME customers

METRO Cash & Carry is commemorating its 16 years of successful operations in India. It has flagged off a grand anniversary celebration for its 3 million small and independent business customers.

METRO customers will be able to avail massive offers in the 48-day-long anniversary sale from 25th June to 11th August 2019.

METRO, since the launch of its flagship store in 2003 in Bengaluru, has built a strong brand equity and trust amongst its small and medium enterprise (SMEs) customers. METRO is also leading the way in kirana digitization with great success and has helped modernize operations of over 500 kiranas across the country.

As part of the celebration, METRO has introduced a campaign, 'Impossible deals are back' to offer attractive cashbacks. There are certain combo deals like Buy One, Get One (BOGO), 50%-off offers, INR 1 deal and many more exciting deals across its 27 wholesale stores. During this period, METRO's loyal customers will get additional benefits of up to Rs. 5000 across a multitude of categories.

Arvind Mediratta, MD & CEO, METRO Cash & Carry India said: “On our 16th anniversary, I thank our 3 million small and independent business customers who have been part of our growth journey and supported METRO to become the largest wholesaler in the country. Last year, we witnessed 1.2 million footfall across our stores and we expect the footfall of customers to increase to 1.6 million this year. We are working towards enhancing our understanding of local customer needs and providing tailored solutions, offers, assortment and services to them, in order to add value to our growing customer base.”







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Meatigo.com plans to launch over 25+ distribution hubs by 2020

Meatigo.com, a premium quality, antibiotic-residue and hormone-free meat delivery service, plans to target over 25 distribution hubs by 2020. The brand is based out of Delhi/NCR and wants to expand to Bangalore and Pune.

Meatigo, founded in 2017, procures high-quality antibiotic and hormone free meats and meat products, which are further inspected by a team of experienced food technologists and trained butchers. The company ensures temperature control at 0-4 °C at every step of the supply chain till the final delivery to the consumer. All the products are vacuum packed and sealed, using the latest German technology that maintains the freshness, texture and flavor of the product.

Commenting on the meat industry, **Siddhant Wangdi, Founder, Meatigo.com**, said: "Consumer research and innovation led strategy has helped us fine-tune our offerings to provide customers with products that set us apart from both unorganized and organized players." The company caters to a unique audience, boasting of a range of 150+ meats products, including raw pork, duck, exotic meats, 60+ fresh deli meat options, imported cold cuts and ready-to-eat offerings like momos, kebabs, burger and patties.



Society Tea forays into a new category with a new brand - Spice Secrets

Society Tea, a celebrated household tea brand in Maharashtra, has launched a new brand – Spice Secrets – and has entered a new category where it will focus on chutneys and pickles. Society Tea's latest product offering is all set to take consumers down memory lane whilst they relish the unique and appetizing piquancy of chutneys and pickles.



Society Tea is the market leader in the tea category in Maharashtra with about a 40% market share of packaged tea. The brand enjoys a considerable presence in Goa, Andhra Pradesh, Madhya Pradesh, Karnataka, Chennai, Punjab, Rajasthan and Delhi.

Society Tea's new launch of Spice Secrets is a perfect amalgamation of the freshest seasonal vegetables and fruits in a traditional blend of spices. Spice Secrets aims to bring a delightful mix of various flavors of India under one house. The brand is available in and around Maharashtra. Currently, Spice Secrets has three variants of chutneys and four variants of pickles.

The current portfolio comprises of three variants of chutneys – *dry garlic, tamarind-dates and onion*; and four variants of pickles – *mango, sweet and spicy mango, mixed and green chilli lime*. The variants take into account consumer insights on flavor profile and are as per their preferences.

Speaking about the latest venture, **Karan Shah, Director, Society Tea**, said: "Spice Secrets marks our entry into a new category. The brand firmly believes in bringing back the art of chutneys & pickles to every household; recipes our grandmothers used and passed on to our mothers over the years. Indian consumers relish a daily dose of spicy & tangy flavors and it takes them down memory lane right to the grandma's kitchen. Spice Secrets is one of our many steps in catering to that need while bringing several flavors of India under one house."

Spice Secrets products are available in various ranges starting from a 20 gm pack to a 200 gm one. They are only available at retail stores in and around Maharashtra and on the company website - shop.societytea.com.

Happilo to launch dry roasted healthy snacking options

Happilo, the gourmet healthy snack brand from Bangalore, which makes many delightful, exotic and tasty products and gives its customers the largest and best collection of healthy snacking options, wants its dry-roasted healthy snacks to leave you craving for more. So, with its new upcoming launch, the brand will ensure that every bite of its product should be an experience and a cherished recollection of the childhood dessert or an exotic flavor of a faraway place. Also, as a healthy snacking option, the products will have no artificial flavors, no added preservatives, gluten-free and zero cholesterol. Other USPs include innovative product flavors like peri-peri, barbeque, chilly lemon, pink salt, etc. The portion packs are priced at Rs. 40 and will be available in all retail stores near you.





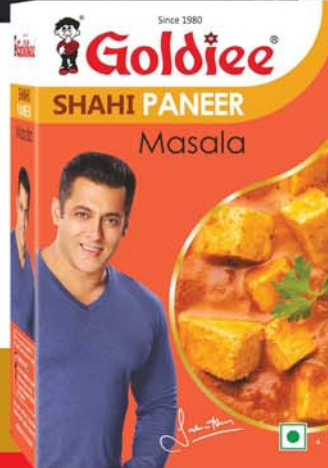
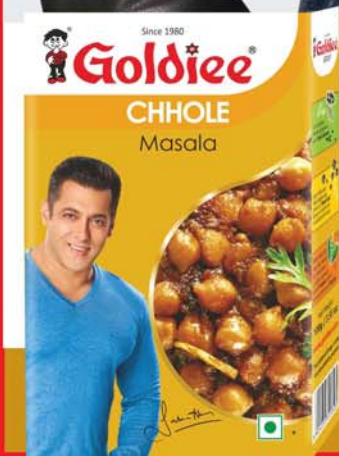
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Madhu Jayanti International strengthens its position in the packet tea segment of India

Madhu Jayanti International Pvt. Limited, a pioneering tea house in value-added tea manufacture and export from India, has acquired the packaged tea brands Tez Red, Premium Gold and Jaago of Eveready Industries India Limited (EIL) for Rs. 6 crore.

Kolkata-based Madhu Jayanti International Limited is India's leading manufacturer and exporter of value-added teas. Along with export operations, it has three premium priced regional (Karnataka and Maharashtra) packet tea brands – Saraswati, Lalpan, Sphoorti and a national tea bag brand TE-A-ME Teas.



Sumit Shah, Executive Director, Madhu Jayanti International Limited, said, “We consistently look for opportunities to better serve our growing customer base and expanding our market reach. With the acquired brands, we plan to strengthen our packet tea business and our brand portfolio to reach newer markets. This acquisition will expand our footprint into 14 tea consuming markets in India. The 75 years of rich legacy and expertise in understanding India's regional taste profiles will take the acquired brands to a new level.”

The company focuses largely on international markets. It has been eyeing brand expansion in India since the past 5 years. Now, with this acquisition of Eveready brands, the company is steadily moving ahead with its agenda of graduating from a regional player to a pan-India player.

Eveready's packet tea brands cater to the lower economy segment of the market. Furthermore, Eveready's brands are present in the rural market while Madhu Jayanti International's current distribution is limited to the urban and semi-urban population of the country. The acquisition will help Madhu Jayanti International to take its mid-premium and premium brands to newer markets by harnessing on EIL's robust distribution channel.

ZappFresh wins CMO Asia National Awards for Marketing Excellence 2019

ZappFresh, a fully-integrated fresh meat brand, has been awarded the “Best farm-to-fork fresh meat brand” accolade at the sixth edition of CMO Asia National Awards for marketing excellence in Mumbai. The organization has been honored with the prestigious award for its innovative solutions in transforming the meat buying experience of consumers through its farm-to-fork model and further disrupting the fresh meat brand market in the country. The winners were chosen from a strong list of contenders.

ZappFresh is headquartered in Gurugram and offers a wide variety of products including raw meat, sea food, marinades, cold cuts and ready-to-eat food. ZappFresh is currently present across eight cities, which include Delhi, Gurugram, Noida, Faridabad, Ghaziabad, Chandigarh, Mohali and Panchkula. The brand will further expand to new cities in FY 19-20.

The CMO Asia National Awards for Marketing Excellence is India's most premium forum that brings together elite marketers, brand custodians, advertising, departmental heads, retailers, real estate professionals, shopping mall owners and creative honchos together under one roof from across India.

Deepanshu Manchanda, Co-Founder and CEO, ZappFresh, said: “The “Best Farm-to-Fork Fresh Meat Brand” award by CMO Asia is indeed a moment of great pride and privilege for the brand. At ZappFresh, we have raised the bar for the meat delivery market through our farm-to-fork model, which has been a real game changer. The accolade is a testimony to our expertise in redefining the meat industry practices with high quality farms, hygienic slaughter houses and state-of-the-art cold chain supply solutions. This recognition will further motivate all of us at ZappFresh to deliver with perfection and fulfill the promise of freshness, hygiene and best quality gourmet meat at all times.”

ZappFresh has been a pioneer in institutionalizing several industry leading initiatives. For example, it was the first to create standard operating processes for farms, training farmers on antibiotic-resistant bacteria, thereby curbing the practice of feeding antibiotics to livestock to accelerate growth. The second landmark initiative was to create a safe slaughtering and processing ecosystem for the meat we eat. Having full ownership of the sourcing supply chain and 360 degree cold chain gives ZappFresh a distinct edge in fulfilling its promise of guaranteed freshness consistently.



R to L: zappfresh Deepanshu Manchanda, Co-Founder & CEO, ZappFresh receiving awards from Sanjay Muthal, Executive Director, InsistSearch

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Ratnadeep Super Market reveals robust expansion plans; opens 1st outlet in Bengaluru

Hyderabad-based food and grocery retailer Ratnadeep Super Market, has entered the Bengaluru market and opened a 5,000 sq.ft outlet in Indiranagar, Bangalore. The store was inaugurated by Sandeep Agarwal, MD of Ratnadeep Supermarket and the renowned film actor Kajal Aggarwal. The store will offer a superlative customer convenience and a pleasant shopping experience to Bangaloreans. The imported fruits, vegetables and products stocked in the regular segment come with the assurance of

best quality and price “The imported assortment, stock keeping units and quality merchandise are an added advantage with easy availability and proven authenticity of different brands compared with what is available in the general market and other stores,” said Agarwal. The Hyderabad-based brand is unique in the supermarket store format as they have better advantage in terms of product navigation and customer friendly visual representation of the products on display.

The brand, which has robust expansion plans, is eyeing five more stores in Bengaluru by year end – in Indiranagar, Koramangala, Whitefield, Mahadevpura, and HSR Layout. “We have earmarked around Rs 75 crore to almost double our network to more than 80 stores, which will be spread across Bengaluru and Tier II & III cities of Telangana and Andhra Pradesh. Currently, Ratnadeep has 54 stores spread across Hyderabad and Secundrabad,” said Agarwal. By the end of 2020, Ratnadeep plans to have 10–12 stores in Bangalore along with 25 additional stores in the twin

cities of Hyderabad and Secundrabad. Talking about the growth of Ratnadeep, Agarwal said, “In three years only, Ratnadeep has opened 30 stores and aims to have a total of 100 stores nation-wide by 2020.”

The food and grocery retailer is planning to open at least 500 stores across the country in the next three years. Besides, it is also looking to venture into the affordable gourmet format, with a strong ROI-based model. “We are betting big on our private labels along with fresh fruits and vegetables. The company will be employing over 4,000 people out of which 60% of the employees will be women. Ratnadeep is expecting to reach a Rs. 1000 crore turnover with a CAGR of 30% by the end of 2020,” said Manish Bhartiya, Director, Ratnadeep Super Market.

Ratnadeep stores are supported with strong back-end integration facilities. The company-owned supply chain model offers a superlative advantage to its stores in getting the merchandise on time, an important benchmark for the retail industry.



More than half of Asia-Pacific's leading organizations see mobile technology as key to improving business performance

Zebra Technologies Corporation, an innovator in enterprise solutions, has declared the results of its latest Asia-Pacific vision study on the 'Future of Field Operations'. This study reveals mobile technology investment to be a growing priority for up to 60 percent of Asia-Pacific organizations. The findings indicate that investments will be made in disruptive technologies and enterprise mobile devices. It will be used to enhance front-line worker productivity and customer satisfaction in field operations, including fleet management, field services, proof of delivery and direct store delivery workflows.

“Our study shows how challenges related to the on-demand economy drive organizations to adopt transformative technologies such as augmented reality and intelligent labels to provide visibility and integrate business intelligence for a performance edge. The top three trends that are driving changes in field operations across Asia-Pacific and India are: growing expectations of performance and convenience from end customers; the replacement of paper in the field by mobile technology; the disruptions to field operations caused by emerging technologies and faster networks,” said



Deep Agarwal, Regional Sales Director of India, Zebra Technologies.

Emerging technologies and faster networks are disrupting field operations. Mobile-first organizations in Asia-Pacific tend to be early adopters of emerging efficiency-boosting field operations technologies. Mobile-first organizations in Asia-Pacific are expected to implement the use of sensors, radio frequency identification (RFID) and intelligent labels from 76 percent to 98 percent from end 2018 till 2023. It is going to make greater use of augmented reality applications from 68 percent to 95 percent from end 2018 till 2023, which can make detail-oriented workflows such as merchandising much more efficient.

Parag Milk Foods appoints a new Chief Executive Officer



Parag Milk Foods Ltd (PMFL), established in 1992, has announced the appointment of Venkat Shankar as the company's Chief Executive Officer. The company is a leader in FMCG products and has recently launched its flagship brand 'Pride of Cows'. It has also ventured into the B2C segment for whey protein with the brand Avvatar, a 100% vegetarian whey protein manufactured in India.

Venkat Shankar is a seasoned FMCG professional with over three decades of experience in dairy, FMCG,

private equity, media and advertising roles. Prior to joining PMFL, he was the VP & Head of the Dairy Business at Britannia Industries Ltd.

At PMFL, Venkat will provide the necessary leadership and strategic direction to the company and help achieve its short-term and long-term objectives. .

Devendra Shah, Chairman, Parag Milk Foods Ltd, commented:

"We are delighted to welcome Venkat Shankar as our CEO. His extensive FMCG experience over three decades would be

tremendously valued in implementing the vision and objectives of the company as it continues on its journey towards becoming a leader in the dairy FMCG sector."

Speaking of his appointment, **Venkat Shankar, CEO of Parag Milk Foods,** said: "Parag Milk Foods Ltd. is constantly setting new benchmarks for the industry by pushing the envelope with innovation. It will truly be a privilege to work with a company full of talented people and brilliant brands. The company has built a strong and robust



Venkat Shankar, CEO, Parag Milk Foods

platform over the years and I am thrilled to be a part of this new phase of growth and look forward to creating long-term value for our stakeholders."

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“We are looking at open 12 new stores over the next three years and plan to invest over INR 1,000 crore within the next five years”

LOTS Wholesale Solutions, part of the USD 50 billion Charoen Pokphand Group (CP Group) and a wholly owned subsidiary of Siam Makro Public Company Limited from Thailand – which runs and manages 113 Makro Cash and Carry stores, 8 Siam Frozen shops and 5 food shops in Thailand totalling 734,713 square metres of sales space and 1 Makro Cash & Carry store in Cambodia – is celebrating its first year of successful operations in India.

LOTS opened its first store, an over 50,000 sq.ft. outlet in Delhi in July last year at Netaji Subhash Place in Pitampura, west Delhi and has since gone on to add two more stores – one in Akshardham in east Delhi and another in Noida. Cash & Carry, also known as wholesale trade, is fast emerging in India, where

LOTS Wholesale competes with players such as Walmart, Metro Cash and Carry and Reliance Cash and Carry, a unit of Reliance Industries Ltd.

How would you like your customers to perceive your store brand and what have been your initiatives towards fulfilling your customer promise and delivering on your brand values?

With customer centricity at the center of our business, our aim is to build the customer's confidence by providing a one-stop-shop solution for all their retail needs. As a responsible brand, our priority is to add value and win the customer's trust across segments. We believe that for a business to succeed, there must be a 'pull' effect from the customer's end, which can only be created if you are closely listening to them. At LOTS, we are committed to regularly taking feedback to improve our services.

Additionally, keeping our end user's best interests at heart, we deliver daily on our promise to pass on extra benefits to our customers. In order to generate value for our audience, we have also been creating customized marketing campaigns that help educate customers on our latest deals and offerings.



Tanit Chearavanont
Managing Director,
LOTS Wholesale
Solutions



LOTS WHOLESALE SOLUTIONS.

Currently, with northern India as its focus region, LOTS' objective is to increase its member base and strengthen its foothold in this region. "We have commenced operations in Delhi-NCR and are looking to enter Haryana, Punjab and Rajasthan in the coming years," says **Tanit Chearavanont, Managing Director, LOTS Wholesale Solutions**, while discussing his company's strategy with Progressive Grocer about growing its current audience base by multifold and the various initiatives that LOTS is implementing to meet its business objectives in India.

Tell us about any interesting concepts or innovations that you have introduced at your stores in terms of category management, merchandising strategy, cross-bundling of products?

As a differentiation strategy, we experiment with innovative technologies across various aspects of the business. With a heavy focus on digitising the back-end solutions, our workforces are successfully tech-enabled to deliver a high-quality customer experience. For us, category management is a crucial aspect of the business and to simplify the process, we use marketing analytics tools along with business development applications. Our intelligent tools, such as geo-tagging, help us to map customer buying patterns and after carefully studying our back-end data, we modify our product offerings according to their business needs.

How are you deploying technology to solve the big pain points in supply chain, logistics, and warehousing?

Supply chain is the most crucial aspect of any business and it has a cascading impact on trade and retail sector. A modernized and efficient supply chain is an essential part of improving ease of

doing business. It helps to scale down the cost of manufacturing and accelerate consumption due to better market access. We are constantly improving our supply chain with our expansion in India. In our first year of operations, we faced certain challenges in terms of streamlining our processes. However, our preliminary market research has enabled us to localize our approach by using global practices, which led to creating a strong supply chain management across our stores. Keeping innovation at the core, we are constantly implementing technology to serve the changing needs of customers to deliver best price and quality with a focus on inventory management. This has further helped us to control and monitor our processes at every step of the way.

What role does your location strategy play in serving your target customer catchment?

Location strategy plays a huge role in our overall business framework. As a part of this, we prefer staying geographically near our customers and accordingly decide our store location. We are currently experimenting with different store formats

With customer centricity at the center of our business, our aim is to build the customer's confidence by providing a one-stop-shop solution for all their retail needs.



LOTS WHOLESAL SOLUTIONS: FAST FACTS

Retailer/ Brand Name:
LOTS Wholesale Solutions

Launch Year: 2018

Parent Company:
Siam Makro Public Company Limited

Total Number of Stores as on date: 3

Number of States present in as on date:
2 (Delhi, Uttar Pradesh)

Total Retail Space as on date:
14,971 sqm in all three stores

Average Sales Per Sq Cm Per Day:
Rs. 9,218 sq cm in all 3 stores (sales area)

Same Store Sales Growth %: 25% growth in the last quarter compared to the previous quarter. Including all 3 stores, growing month on month

Number of Employees: Approx. 500

SKUs: 5,000+

We believe that for a business to succeed, there must be a 'pull' effect from the customer's end, which can only be created if you are closely listening to them. At LOTS, we are committed to regularly taking feedback to improve our services.



basis the demand and demography of various regions. Based on our retail expertise, we want to populate targeted areas with multiple stores so that we can cater to our business customers effectively. In line with our cluster approach, all our stores are well-connected with various means of transport, increasing our customers' convenience and their frequency of store visits. For instance, all our stores in Delhi-NCR region are within 20-25 minutes from customer catchments and are well connected with various means of transports, making it convenient for consumers to shop with us on a regular basis.

How do you look at the growth rate of the wholesale cash and carry trade in India in relation to the pace of growth in modern retail and how do you evaluate the opportunities and challenges for this format in the country?

India's B2B retail market has proven to be profitable for domestic as well as global retailers. With the sector's immense growth potential, the industry is set to grow to US\$1.1 trillion by 2020. With a captive base of 12 million retailers and a growing HoReCa segment, India's high potential market is backed by favourable policy reforms such as FDI in retail, GST and RERA. This, in turn, has created opportunities for brands like us to implement our global strategies in transforming the retail narrative in India. Following this upward growth trend, we are aiming to tap into India's organised retail trade, which currently comprises less than 10% of the total \$670 billion retail business.



Being a developing country, the market poses initial challenges for the retail sector, including adequate supply chain, real estate and the required infrastructure. Given the complex nature of the Indian market, it is imperative that global companies understand their uniqueness and adapt accordingly. With our 30 plus year expertise in the B2B retail segment and understanding of customers need, we are equipped with a unique approach to adjust to the current market conditions, which will further enable us to reinforce our position as a global leader.

As head of LOTS' operations in India, what is your current focus and business game plan?

As part of our growth plans, we are aiming to capture the largest market share in India by bringing in new technologically driven practices to organise the current retail segment. Having launched three stores in just over a span of six months of operations, we are one of the fastest growing B2B retailers and are headed towards an even more robust expansion. Over the next three years, we are looking at opening 12 new stores in





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41-DAY-LONG ANNIVERSARY CELEBRATIONS WITH MASSIVE BENEFITS FOR MEMBERS

LOTS Wholesale Solutions is celebrating its first anniversary in India. Commemorating its first-year milestone in India, the retailer is all set to extend the celebrations to its over 1,40,000 registered members. The festivities will continue for over a month, beginning from 27th June to 6th August.



The 41-day shopping extravaganza is spearheaded by “Lakhon Ka Khel” campaign, which will focus on maximizing profit for customers on every purchase made at LOTS stores. As part of this campaign, LOTS has planned exciting deals for its business customers including lucky draws, vouchers, instant discounts, hampers, cash prizes, brand merchandise and more.

“Lakhon ka Khel” campaign star offering comes in form of Rs 1 lakh cash prize lucky draw that will take place every Wednesday at all its stores. To make the anniversary more engaging and rewarding, LOTS will also organize lucky draw every hour on six consecutive Sundays. The winners will take home high value hampers. Besides, each member will be given a book of multiple coupons, which upon usage will unlock benefits of over Rs.10, 000.



Commenting on the milestone, Tanit Chearavanont, Managing Director, LOTS Wholesale Solutions, said, “It’s a great moment for LOTS and everyone associated with it. Our members have supported and encouraged us during this past one year. With this anniversary celebration, we wish to show our gratitude to our members and give them windfall return on their purchases at LOTS. This 41-day-long campaign will not only delight our existing customers but will also expand the horizon for us to acquire new customers. We invite our business customers to make the most of this time and drive profitability with every purchase.”

With this campaign, one year old company LOTS Wholesale Solutions aims to drive loyalty with its members by giving multiple offers along with competitive pricing and year round availability. While LOTS’ unique anniversary programme is expected to excite its current base and at the same time attract new membership requests, the retailer is also counting on its members to be able to generate more profitability year on year.

the country. In addition to this, within the next five years, we plan to invest over INR 1,000 crore towards developing a stronger retail ecosystem.

Currently, with northern India as our focus region, our objective is to increase our member base and strengthen our foothold in this region. We have commenced operations in Delhi NCR and are looking to enter Haryana, Punjab and Rajasthan in the coming years. With an integrated approach, our e-commerce portal will also support our objective to help grow our current audience base by multifold.

Our concerted efforts remain in line with our customer’s business objectives and our omnichannel business model aims to effectively deliver convenience to every customer segment. One of our current client requirements is to reduce their sourcing time and we are actively working with them across various initiatives to provide the same. In a nutshell, our glocalisation strategy aims to overcome challenges by applying global practices with localisation of our products at core.

Investor interest in India’s online food and grocery has perked up as never before. What are the reasons for this heightened shift and do you see a major channel transformation afoot in the industry?

The expansion of the middle-class population with disposable income is driving a strong purchasing pattern across the online food and grocery segment. India is home to the youngest population in the world and various factors including increased internet and mobile technology penetration have contributed towards creating a dynamic market environment in India. This has opened up various avenues for the organised e-retail players. According to RedSeer Consulting, India’s grocery market is valued at \$500 billion and merely a 0.2% of that value is online. Considering the massive growth potential, the industry is expected to expand at 50% growth over the coming years based on various online and offline models. This has further increased investment opportunities from global and domestic investors.

In terms of your e-commerce business in India, how are you looking to grow and expand it and what are your goals for the future?

Going by the current consumer demography in India, e-commerce is the next big thing, which will help acquire a large share of customers in the retail segment. We are looking at a ‘three-click experience’ by investing in e-commerce platforms that will further be complemented by our application. Our core idea is to harness world-class online capabilities that offer tremendous ease of purchasing from LOTS Wholesale Solutions. This is also done with the aim to help members achieve their business goals of reducing their sourcing

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We deliver daily on our promise to pass on extra benefits to our customers. In order to generate value for our audience, we have also been creating customized marketing campaigns that help educate customers on our latest deals and offerings.



time. As an active player of the cash and carry segment, we feel that a complete online transition will still take time for smaller entrepreneurs and Kirana customers. Thus, retailers need to look at a combined online-offline approach for a sustainable business model.

Tell us about the latest initiatives concerning LOTS' support & partnership programs for kirana traders, farmers and women entrepreneurs?

Our primary efforts in India are concentrated towards community and people development. As responsible business partners, we have been sharing our growth benefits with our member base including small retailers, kiranas and traders at large. Our customer-centric initiatives have also benefitted upcoming entrepreneurs including women, start-ups, etc. to leverage their products and services to their benefit and increase their overall business growth. We provide a sustainable ecosystem for kiranas, farmers and small suppliers and lend support to home-grown brands, which are an essential part of our region-specific business strategy. This approach is also extended to the daily needs and grocery section of our product range.

As a part of our farmer engagement programme, all efforts are made to source fresh produce from local farming communities, which help them

get better returns while reducing wastage during transportation and storage. We are also working towards creating a market for start-ups and smaller brands in the field by providing them with a credible launchpad.

Looking ahead five years from now, how do you visualize the F&G industry landscape in India and where do you see LOTS India in the future perspective of things?

India is one of the most favorable retail hotspots due to extensive retail expansion supported by economic growth, increasing consumer consumption, rising urbanisation and increasing spending power. The overall organised India retail market is currently valued at the US \$60 billion, out of which food and grocery accounts for the largest share of the revenue. The government has also played a strong role by supporting this segment and creating better opportunities in the sector. Riding on these factors, we are leveraging our international market expertise to provide high quality products and services to our customers.

In India, we have noticed that food and grocery retailing is still dominated by general stores, kiranas and convenience stores. This was a strong indication to us that we could use this opportunity to be an active contributor and supporter of the whole ecosystem. The organized retail expansion has grown from mega cities to smaller towns as well as villages. This further complements our vision to launch 15 wholesale distribution centers across northern India catering to a larger audience with high quality food and grocery services.

How would you describe your strengths and best achievements so far?

Our success story in India so far has been led by four strategic cornerstones – increased accessibility, targeted region-specific strategy, focus on home-grown brands and our cluster approach. Our customers' encouraging response has been a strong force of inspiration for us. Going by our growth trajectory, we have already successfully acquired 1,40,000 customers in the first six months of our operations. This is a testament to our hard work backed by our strong market expertise and differentiated services. We have also fared well on customer satisfaction with our delivery turnaround time spanning anywhere between 12 to 36 hours, almost at par with the e-commerce market.

Our innovative customer campaigns have also been instrumental in attracting a large customer pool leading to repeat purchases at our stores. These campaigns go beyond just business narratives by also building excitement within the LOTS community. India is one of our key focus markets and we are thoroughly invested in organising and growing the retail industry here.





कोई केमिकल्स नहीं

कोई पोलिश नहीं

वही विश्वास

नया अंदाज़



Key Initiatives by LOTS India

LOTS has launched its state-of-the-art business development application (BDA) to deliver quality products and services to its members and partners.

STORES OPENINGS In line with its international strategy, LOTS India has adopted a cluster approach for expansion in the regions where its stores will operate. Along with the cluster approach, it is empowering its members with the required infrastructure and services to strengthen the brand's presence. Catering to the specific needs of customers, LOTS India has successfully opened 3 stores in a short span of six months of operations. This has further fortified its position to become the fastest growing cash & carry player in India. The company's focus is to expand in north India first with operations in Delhi-NCR, followed by Haryana, Punjab and Rajasthan in the coming years. Following its robust expansion plan in India, LOTS has become the first cash & carry player to open a warehouse supported by its first collection center in Haryana.

TECHNOLOGY ADOPTION The company believes that great customer experience comes from blending technology with a personalized touch and experience. With the core ideology of having technologically driven innovation at the center of its business model, it is merging new age technology across all functions to provide a seamless shopping experience to its customers to enhance their overall service experience. Integrating personalization with its business strategy, LOTS has launched its state-of-the-art business development application (BDA) to deliver quality products and services to its members and partners. The company's e-commerce portal coupled with its mobile application will further provide an opportunity to members to shop at their convenience. LOTS' technological adoption also focuses on geo-tagging of customers, digitized back-end solutions at the stores and tech-enabled workforces to serve all categories of customers. Summing up the above, LOTS wants to be a true omni-channel retailer in India, which is the future of retail.

SUPPLY CHAIN MANAGEMENT Supply Chain is the backbone of any retail business and thus it is imperative to have an efficient supply chain to facilitate movement of products leading to increased consumer consumption with better market access. LOTS has implemented a flexible, scalable and sustainable strategy to keep ahead of the constant change in the retail landscape, customer needs and behavior. This has further helped the company to ensure an effective supply chain and a well-managed inventory system. LOTS' direct supply chain gives the benefit of better-quality fresh produce at the best prices. It is also the only cash & carry player to implement a full-fledged distribution network that handles multiple product categories catering to various demands from its stores. Its trucks are designed to carry fully-palletized lots with department ready stock, which can instantly replenish the store shelves. The LOTS centre has real-time visibility of the shipment arriving at the store, including the details of the SKU-wise quantities to meet customer demand.

PRIVATE LABEL/ OWN BRANDS Earlier this year, as part of its business strategy, LOTS launched its own private label to cater to customers looking for greater value and high quality at an affordable price. Its in-house brands Basic Plus & PlusMo are in home cleaning, bakery and bakery products. This has made LOTS the only cash & carry player to introduce own brands in the first year of operations. These brands offer premium products at a price range that is 10-15% lower than the market price. Based on the core philosophy of local love, these brands have become LOTS members' first choice in the respective categories. The company will soon be introducing more products in different categories like drinking water, sauces, spreads, processed food, breakfast solutions and disposables.

CUSTOMER SERVICE With customer centricity at the core of its business, LOTS has been making efforts to improvise its customer service every day. Its current team comprises more than 30 highly skilled relationship managers who are available to assist its members & partners. At LOTS, the staff believes in going where their customers are, hence the team comprises a mix of in-house and on-field customer care executives to ensure a hassle-free shopping experience. Integrating personalization with its customer service, LOTS has created multiple touch points for its partners, which include a customer helpline, an online forum and dedicated employees at the stores to provide instant solutions for customers.





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Keeping innovation at the core, LOTS is constantly implementing technology to serve the changing needs of customers to deliver best price and quality with a focus on inventory management.

FARMER ENGAGEMENT Farmers are an integral part of LOTS' business and it prioritizes purchasing directly from farmers to provide transparency. Taking another step towards farmer's development, LOTS has collaborated with the Ministry of Food Processing Industries (MOFPI) and conducted a workshop with over 1,500 farmers in Bhatinda. The workshop provided a platform to farmers to interact with industry leaders and gave them insights on procurement models and practices for backward integration. Also, in line with the government's efforts to increase the farmer's income, LOTS is making them its business partners with each store that it opens. Staying true to its commitment, it has also opened up its first collection center and is aiming to open more in the coming future. These centers will make it convenient for farmers to not only drop their products but also seek education about better production practices.

SMES CONNECT One of the key pillars of Makro Capabilities Engine for sustainable mutual growth is local love, which empowers LOTS to source a large majority of assortments locally and help its partners grow their own businesses. Following its philosophy of shared growth, LOTS is closely working with SMEs and other manufacturing companies, promoting entrepreneurship, and encouraging the youth to secure opportunities in the Indian retail industry. The company currently engages with more than 400 SME suppliers who provide it a range of their products.

DISTRIBUTION To ensure that it stays ahead in providing a seamless shopping experience, LOTS has been implementing various steps and measures – right from tech-enabling its workforce to digitising the back-end solutions at its stores. It has put in place a first of its kind business development

application, which enables it to reach out to a wider audience in India and allows it to personalize its distribution strategy. To serve its customers better, it is also digitising its distribution networks and using geo-tagging to ensure quick and on-time delivery of products. Its warehouse is managed with a customized WMS to cater to the specific need of the cash-and-carry business, which is integrated with its Master Data, Procurement and Inventory Management systems. These systems are set-up to automatically allocate stock basis customer demand at stores and trigger physical shipment of goods.

INVENTORY MANAGEMENT LOTS is using its marketing analytics tools along with its business development application to simplify the process of inventory management. This approach enables it to stock products and maintain a larger inventory for providing a vast assortment of products as per customer's need. The retailer aims to be less dependent on third parties and focus on buying in bulk directly from the manufacturers, thus providing more transparency and cost benefits to its customers.

INVENTORY TURNOVER Owing to its expertise in the food segment, LOTS' focus is on continuing to deliver freshness to its customers across segments. It will continue to keep enhancing the supply chain and focusing on optimizing costs.

DELIVERY LOTS' delivery service consists of an unloading facility at the shop, free packaging support, easy returns and a call centre with a stringent turnaround time for complaint redressal. Being a responsible member of the corporate community, LOTS has implemented sustainable solutions with CNG trucks for transportation and is looking to introduce electric trucks as well.

PROCUREMENT Catering to the highly competitive consumer-focused environment, LOTS' efforts are concentrated on providing the right products for meeting its different customers' demands. It has adopted advance procurement strategies and technologies that go far beyond the traditional focus on just cost savings efforts and thus have become the first B2B retailer to open a warehouse to ensure product availability 24x7. In India, LOTS' approach is to replicate its global collection centre model by opening collection centres at multiple locations. For procurement and replenishment, it also has in-house systems, which automatically create purchase orders based on set parameters managed by its supply chain. Additionally, LOTS' suppliers are connected through a portal (LOTS S2P) to provide real-time visibility into purchase orders and shipment of goods. **PG**

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BUDGET REACTIONS

Retail industry stalwarts share their thoughts about what Budget 2019-20 has for the retail sector.



Arvind Mediratta
MD & CEO,
METRO Cash & Carry India

➔ As a champion for independent business, we welcome the Budget 2019' focus on ease of business, improving livelihoods and spurring job creation at the ground level. The proposal to streamline multiple labor laws in four labor codes is an important step towards the much awaited labor reforms.

MSMEs and start-ups have a big role in creating mass employment generation and value creation as India sets course to be a US\$ 5 trillion economy. The pension benefit cover of Rs 3,000 per month will allow small kirana store owners and traders to reinvest money they were setting aside for their future security into growing their business. Further, loans of upto Rs. 1 lakh for MSMEs and Rs. 350 crore outlay under the interest subvention schemes will ease the much needed credit flow to the sector.

Measures like setting up new livelihood and technology business incubators to develop 75,000 skilled entrepreneurs in agro-rural industries and 10,000 new farmer producer organizations and the Pradhan Mantri Matsya Sampada Yojana (PMMSY) scheme for fisherman will improve rural livelihood.



➔ To ensure better market access for farmers across the country, creation of One India Agriculture Market is very desirable. Faster uptake of the agricultural produce and livestock marketing (APLM) Act 2017 is needed at the State level as it has progressive provisions such as single levy of market fee, single licenses for traders and de-listing perishables from the ambit of the APMCs.

Allowing better price realization for farmers is another key objective for the growth of the agriculture sector. This can be helped through a National Agriculture Market or eNAM as it aids enhanced competition in terms of increased biddings. To help e-NAM perform to its full potential, government push is needed to create assaying, sorting and grading infrastructure at the mandis. This will help reduce variance in quality of produce from mandi to mandi, and encourage retailers and processors to procure through e-NAM.

Besides this, government should ensure wider adoption of electronic Negotiable Warehouse Receipts (e-NWRs) to help further strengthen the market. These steps will enable better market access and remuneration for farmers across India, thereby contributing to the Prime Minister's vision of 'Doubling Farmer Income by 2022'.



Simon George
President, Cargill India



Siddharth Khinvasara
Co-Founder, EarthFood

→ The Union Budget 2019-20 is very promising, especially for the agriculture sector. The incubation of zero budget farming that involves zero credit for agriculture and no use of chemical fertilizers is a welcome move by the government of India. The government's stance of setting up 10,000 farm producer organizations by 2022 will ensure economies of scale for farmers regarding access to inputs and markets, which will truly enhance the agriculture sector. Additionally, 80 livelihood business incubators and 20 technology business incubators will be set up to produce 75,000 skilled entrepreneurs in agro-rural industries, which will be a boost for a lot of budding entrepreneurs in the agri space.

The government's focus on promoting entrepreneurship is quite evident. The announcement of an exclusive television channel for start-ups creates a platform for discussing issues affecting the growth and match-making with venture capitalists and this move is being widely applauded by the start-up industry. Clearing the air around the Angel tax issue has been a relief for the startup community. Start-ups not being scrutinized by the IT department regarding the funds raised is a huge revolution for the start-up ecosystem as this would reduce the burden on the budding entrepreneurs. From a business standpoint, 25% corporate tax, which is now stretched to companies with a turnover of Rs. 400 crore, is going to really boost the MSMEs and help them grow and survive in the competitive market.



→ The government's continued focus on building a healthy entrepreneur ecosystem as a key aspect for economic growth is very encouraging. Several measures have been taken for easing FDI rules in various sectors, which will have a direct impact on innovation and spur the entrepreneurial spirit. In line with this agenda, the announcement to set up national tech incubators will promote business and economy. This is further visible in the government's efforts towards boosting investments in MSMEs.

Also, the government is actively looking to enhance skills and proliferation of emerging technologies such as Artificial Intelligence, Big Data, Robotics. Overall, we believe that the government's thrust towards digitization to promote manufacturing and innovation are incremental steps for making India a front runner in technology, across the world.



Vartul Jain
CFO and Senior Vice-President, GreyOrange



Ravi Mathur
Chief Executive Officer, GS1 India

→ The Union Budget 2019 talks about easing of local sourcing norms for foreign investment in single brand retail. This would encourage more global retailers to set shop in India. For those already operating in India, it would enable them to expand their product offerings, which in turn would provide greater choice of merchandise to Indian consumers.

→ This is a very encouraging budget for the SME/MSE sector. With government's initiative, farm output has increased, which will help promote the agri-processing industry. We have plans to invest in developing value-added, healthy agro-based products. Another big policy put forth by the finance minister on 'One nation One grid' for easy power availability at one price across States is also very stimulating for the industry.



Vikram Agarwal
MD, Greendot Health Foods Pvt Ltd (Cornitos)



“Pack to order” of fruits offers more value to the modern retailer

The unique selling proposition of ‘Pack to order’ is supplying produce as per customized format from the source itself.

By **Sreekumar C Sreedhar**



Pack-to-Order” concept means packing and supplying produce, majorly fruits, customized to the requirement of the retailer, from the farm source itself. It is best suited for fruits such as Grapes, Oranges, Pomegranates, Kinnow, Apple, Thai Guavas, etc. It is a complete farm-to-retail model without any major investment in the back-end infrastructure and entails no manpower for the retailer. In this model, only the customer order quantity is harvested, which helps to reduce wastage and carry forward the stock at multiple levels of the Fruits & Vegetables (F&V) value chain. Also, the store gets real farm fresh stock.

Pack-to-Order has become more relevant today to the modern retailer for the many advantages it brings, including savings in costs, time, labour, and resources in bringing the produce from the farms

to the market. It reduces wastage, improves product quality and shelf life, thereby resulting in repeated buying from the customer.

In the model, temporary packaging centres are created in the middle of the major growing belts. Immediately after the harvest, the fruits are packed into punnets, which are again repacked in carton trays, and customized to a retailer’s order with relevant stickers and barcodes if required. The packs are then transported in a reefer van directly to the retailer across major cities in India. Earlier, Pack-to-Order was applied only for exports.

The ill effects of multiple handling & crate management in conventional retailing

Today, every major distribution centre of big time modern retailers handles an average volume of 80 to 150 tonnes per day of fruits. During promotions,

the volume is far higher. In such a situation, getting the produce from a vendor, re-packing, labeling and supplying becomes difficult as it is a time-bound activity. Today, produce is mostly brought from the market or the farms in crates, packed and repacked at the vendor's place, company warehouse and at the store level. Multiple vendors are involved due to the bulkiness of the order, often resulting in damage due to multiple handling. Also, the delay in reaching the retailer brings down its shelf life and quality.

Besides, there is wastage and the loss has to be recovered. This is done by increasing the product price for the consumer. Thus, the product quality goes down but its price rises.

Similarly, every retailer holds only so much inventory of crate. During transaction, the crates of vendors and retailers get exchanged, mixed up, with either parties losing their crates. Shifting the stock from the vendor crates to company crates and allocation of multiple tonnes of produce for taking into store is a Herculean task and very time consuming. In a season, every vendor loses 300-400 crates, costing them more than a lakh of rupees.

Pack-to-Order solves many problems

In the Pack-to-Order model, as the produce is sourced and packed at the farm gate level, there is no weight loss for the farmer, resulting in a higher realization for him. Otherwise, in an open market, he loses money from the moisture-related and transit damage weight loss, in agent commission, transportation costs, etc. If 1,000 kg fruits are sold, a farmer, on average, loses 50-80 kg.

In this model, the product goes into primary packaging of 500 gm or 250 gm. It is then packed into a carton box or tray, which has a predefined standard weight. The distribution center can directly receive and allocate to the store the stock after completing the quality-checking formalities. This saves a lot of time and energy and reduces the handling damage of fruits. Here, there are no issues of multiple handling or transit damage. The freshness of the product is maintained with an efficient cold chain. If the transportation is done overnight, ambient temperature can be maintained. If it takes more than 18 hours of transit, reefer trucks can be used, thus enhancing the product shelf life and quality, and giving more value to the customer.

In conventional crate packaging, the box is 25% overstuffed with fruits, often resulting in pressure-related damage of upto 30% of the produce. The produce, which is damaged, will now have to be sold at a 50% reduced price at the retail level.

On average, the Fruits & Vegetables section at a retailer experiences wastage of 8-12%. In extreme cases, this could go up to 18%, especially for seasonal fruits. Even the most efficient retailer faces 5-6% wastage today.



By adopting the Pack-to-Order model, the wastage could be restricted to 2% for that particular SKU. So, if we increase more SKUs into the Pack-to-Order model, there could be a major reduction on wastage. There would be more operational costs involved but it balances out with zero or less wastage., good product quality and better shelf life, improved service level to the retailer and, at the end, a smile on the face of the customer.

In foreign countries, the Pack-to-Order concept is very popular but in India only very few have given importance to it. The concept has not taken shape yet due to factors such as scattered farms with limited landholding, cultural and infrastructural reasons.

The Pack-to-Order model can be adopted and implemented immediately and could be scaled up in a phase-by-phase manner. The only condition is that the retailer needs to actively partner with the vendor to do the proper planning, well before the season begins, and orders in advance about the customization in quantity vis-à-vis pricing that he would require. This will enable the vendor to plan things backward, choose the right location, farms, farmers, labourers, packing material and transportation required for the delivery. Once a proper pattern is set, the vendor will be able to help even for an order at the eleventh hour from the retailer. It will be difficult for the model to evolve if the retailer does not take an active interest in the partnership.

To sum up, successful adoption of the Pack-to-Order model will increase sales and margins for a retailer, provide better value and realization to the farmer, give a consistent quality of fruits to customers and, above all, support the social cause of limiting the wastage of food. **PG**



In the Pack-to-Order model, as the produce is sourced and packed at the farm gate level, there is no weight loss for the farmer, resulting in a higher realization for him.



The author is Executive Director, Greeneries Agro Pvt Ltd., one of the largest sourcing partner and end-to-end service provider to all major modern retailers for their fresh fruits and vegetables requirement.



A Growing Market for New Flavors Snacks

By Sanjay Kumar

Munching of namkeen and snacks is a very old practice in India. The history of snacks shows that until about forty years ago, there were just 2-3 types of available namkeens in the market. But after the mid-80s, the varieties developed tremendously and the triple layer pouch packing started playing a major role/ factor in developing the category, extending the shelf life of products to six-twelve months. Today, around 1,000 snack items are sold in India spanning various tastes, forms, textures, aromas, bases, sizes, shapes and fillings. Besides, some 300 types of savories are sold in our country today.

But until three decades ago, snacking meant having snacks that were prepared hot, sun-dried or stored in containers by grandmothers at home. People seldom bought snacks as everything was prepared at home and there was not much available in the market either. It was only about a decade or two ago that the snack market slowly started emerging in India and the scene became totally different with mothers becoming busy and dependent on snacks and convenience foods. The snacking scenario has changed with an increased number of people consuming snacks daily and making it a part of their meal. Snack consumption has increased over the years as plenty of choices and new varieties are being offered constantly. Individual snack brands have progressed successfully and created a brand value among end consumers. With the rising population and a growing economy, there is a steady growth in the demand and supply of snacks.

Snacks: Current Market Scenario

Today, more than ever before, eating occasions are now overwhelmingly linked with snacks. Be it ready-to-eat popcorn, veggie chips or nuts, snack items considered better-for-you options are driving sales growth in snack food categories. Analysts attribute this trend to the rise in urban population, increasing per capita income, busier lifestyles, higher disposable income and a need for convenience arising out of the fast-paced lifestyles and a growing cultural tradition of snacking between meals.

Busy shoppers view snacks as mini-meals and they are snacking more than ever before. Consumers looking for healthy alternatives to classic fried potato chips are sampling

Today, more than ever before, eating occasions are now overwhelmingly linked with snacks. Be it ready-to-eat popcorn, veggie chips or nuts, snack items considered better-for-you options are driving sales growth in snack food categories. The growing demand for foods and beverages with unique qualities – natural, functional, energizing, satiating and convenient – are causing consumers, manufacturers and retailers to rethink the traditional snack category, with products continuing to evolve and lines increasingly blurring. Retailers and brands should join hands to promote snacks by helping consumer to shop better and buy products that suit their taste preferences. This can happen only with their combined efforts and will help pave the way to even bigger innovation and expansion in the snacks category.

options that include nachos, dehydrated vegetable chips, roasted and baked chips and popcorn. The veggie chip market is showing a 17% annual growth. Indian demography, by its virtue, holds a prominent place for vegetarians by choice or customs, especially in and around northern India. More so, when there are all vegetarian no-garlic, no-onion options to go along with, this category is bound to grow in leaps and bounds, as it is about meeting the growing consumers' needs.

Young India's preference for on-the-go, dry snacks have gone several notches up in the past decade. Foreign brands entering India post-liberalization, in the '90s, have acted as the chief propeller for this trend. Although, the Indian snacks market continues to be dominated by potato chips, salted savory snacks and traditional sweets, new flavors are on the rise. Thanks to the changing tastes of the Millennials and the emerging health trends, the consumer is willing to experiment and has become receptive to fresher, newer ideas. A number of factors like mass media, social media and frequent international vacations, have become the catalysts for fostering these changes. These platforms are introducing the Indian taste buds to new global delicacies and flavors, and gaining access to information about them is just a click away.

Today, consumers want a variety of easy-to-carry, price-effective snacks that do not compromise on taste and nutrition. Teenagers, being health conscious, look for healthier and high-grade products and they also have attraction for new products. Adults look for the brand and price and they want their money spent well; hence the quantity aspect too forms a key consideration in their choice making.

The average annual per capita consumption of commercial snacks in India is 500 gm. India currently exports nearly \$3 million worth of savory snacks, including extruded or expanded products, registering a Y-O-Y growth of almost 22-23 per cent annually. The top five countries for exports are the USA as the prime market followed by Australia,

Thailand, Israel and the UAE due to the huge Indian expat population in these countries.

Consumers from western India are the leading snack consumers, followed by the North. As the population from various regions of the country have been migrating towards urban business centres – resulting in a diversified demography in those urban centres – the people have also retained their food habits irrespective of the place they are relocating to. As a result, there is a considerable rise in the demand for local favored snacks in other parts of the country.

For instance, staple Gujarati snacks such as khakra, phapra and dhokla are available in packaged form across all parts of the country since the Gujarati population has been migrating towards the northern, southern and eastern part of the country due to professional reasons. This trend is strong in savory snacks, which is growing at 14% CAGR since 2015 in retail value at constant prices. Analysts say that future growth in both salty and savory snacks will be driven by consumers' rising disposable income and changing lifestyles and by manufacturers' product innovation and expansion of distribution into lower-tier cities and rural areas.

Most of the traditional snacks such as khakra, phapra, murukku and chakli, which were previously prepared at home, are now available in packaged form. Analysts say that the market will be promising for any traditional snack that is yet not available in the market

Salty snacks is the largest selling snack product in terms of retail value sales with a contribution of 55%-58% of total value sales within snacks in India. It is also the largest in terms of volume share.





The snacking scenario has changed with an increased number of people consuming snacks daily and making it a part of their meal.

in packaged form. Also, with India being a price-sensitive market, some regional manufacturers have increased the volume/amount in their local flavored products, without changing the price point. As regional manufacturers have become successful in offering local flavored products from other regions – apart from the place of origin of the product – it is creating a significant challenge for leading market players such as Pepsico in western snacks.

Market Size and Segmentation

According to Mintel research, the major product segments within retail packaged snacks category includes:

- ▶ Chips, which includes primarily potato chips;
- ▶ Snack Nuts, which includes packaged nuts intended for immediate consumption;

- ▶ Other Snacks, which includes potato-based snacks, rice-based snacks, corn-based snacks, popcorn, fruit snacks/jellies among others. Other Snacks also covers a large variety of branded and packaged traditional snacks, including but not limited to mixture, chivda and banana chips.

As per Mintel’s Global New Products Database (GNPD), Other Snacks, which is the largest segment, account for 70% by volume and 61% by value of the retail snacks market in India. Chips follow, accounting for 34% by value and 27% by volume. Snack nuts accounted for 4% of volume sales and 6% of value sales. But this segment is seeing the highest volume of growth in terms of new products, and is also a leader category with regard to new launches in the market. One snack category seeing a lot of growth is ready-to-eat popcorn/caramel corn. That’s not surprising, since many manufacturers are introducing new flavors and varieties.

As per Mintel report, during 2011-15, the Indian retail snack food category grew at an annual rate of 20.5% by value and 12.3% by volume and the category is projected to grow at an annual rate of 18.0% by value and 13.3% by volume in the 2016-20 period. The report finds that snacking is pretty much an established trend for Indian consumers. About 75% of adults aged 18-64 said they snacked at least once a day. Among younger adults – those in the 18-34 age group – 77% said they snacked once a day. This dropped slightly to 73% for adults aged 35-64 years. According to Mintel’s data, India’s organized snack market was worth INR 197.8 billion in 2015 and it should only continue to grow as India is one of the fastest growing economies in the world.

According to Euromonitor International, savory snacks – the aggregation of fruit snacks, chips/ crisps, extruded snacks, tortilla/corn chips, popcorn, pretzels, nuts and other sweet and savoury snacks - in India has been outperforming the overall packaged foods category. “Savory snacks recorded a 19% year-on-year value growth, through 2013-18. On the other hand, the overall packaged foods industry registered a growth of 18% year-on-year, through the same period,” says Prashant Roy, Senior Research Analyst – Food & Nutrition at Euromonitor International.

“Even though savoury snacks is a mature category, yet the prospects of the category looks extremely promising in the future,” says Roy. He points to some of the major growth drivers and the consequent trends:

Snack Food – India Retail market size			
VALUE IN LOCAL CURRENCY			
	Value	Unit prices	Value growth
Units	bn INR	INR per kg	%
2007	43.4544	181.4	
2008	50.056	187.1	15.2
2009	59.2664	195	18.4
2010	76.987	221.8	29.9
2011	93.641	238	21.6
2012	112.3692	262.4	20
2013	137.0904	298.5	22
2014	162.0131	305.9	18.2
2015	197.751	315.9	22.1
2016	236.6128	314.1	19.7
2017	284.5497	327	20.3
2018	333.9611	339.9	17.4
2019	390.8865	353.94	17
2020	459.3731	369.69	17.5

Sources: Company Information, Trade Interviews, Mintel.



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- ▶ Increasing demand for regional snacks leading to the rise of regional brands: The market has witnessed strong performance from regional brands such as Haldiram and Balaji Wafers. Capitalising on the high consumption of traditional snacks or local flavoured snacks, these companies have been able to gain significant market share from western snack manufacturers, such as Pepsi.
- ▶ The slower growth rate of Pepsi, in comparison to the regional manufacturers, signifies the shift in consumer preferences towards packaged traditional snacks.
- ▶ Owing to a hectic lifestyle, the preparation of traditional snacks at home is also declining. However, the availability of snacks on-the-go and in packaged form is able to satiate this desire and demand of Indian consumers, who are famous for their taste buds.
- ▶ Receding impact of GST: The implementation of GST created considerable uncertainty in the market, primarily affecting the category growth in 2017. However, the market has stabilized and is forecasted to chart double digit growth in 2018 and beyond. Tax rates have

The two most important factors that will drive the growth of the snack category are a commitment to healthier choices and diversity in offerings that appeal to niche consumers (i.e. organic, gluten-free, etc.).



now been simplified, which has improved their margins. These improved margins mean that manufacturers can pass on the benefits to the consumers, either by lowering the retail prices or by increasing the volume of snack in the package, without changing the price point.

- ▶ A high demand for snacks with local taste and flavors, coupled with a spike in the consumption of traditional snacks, especially during festivals, are the other growth drivers for this category. However, the value growth rate was 14% in 2018, touching INR 335 billion by the end of the year.

Another industry report says that the overall market for namkeen and snacks in India is of about INR one lakh crore. Being a most vibrant industry, it has seen an unprecedented growth in the recent past and continues to expand rapidly. Indian consumers seem to have recovered their taste for traditional snacks such as sev, bhujia and namkeen/mixtures, which are contributing to the impressive growth rate of the firms. About 30% coverage of this market is in the hands of organized trade players dominated by Haldiram's, Pepsico, Balaji (wafers & namkeens), ITC (Bingo), Prataap Snacks (Yellow Diamond), Bikanervala (Bikano), DFM Foods (CRAX), among others.

With the entry of major players like PepsiCo, ITC, and Balaji Wafers in the snacks category, salty snacks have grown tremendously over the past decade. The introduction of brands such as Lay's, Uncle Chippis, Bingo! and Balaji within potato chips and brands such as Kurkure, Cheetos, and Bingo! within puffed snacks have proved to be a huge hit among consumers. According to market researcher Euromonitor International, salty snacks is the largest selling snack product in terms of retail value sales with a contribution of 55%-58% of total value sales within snacks in India. It is also the largest in terms of volume share.

"The size of the Indian snack market is Rs. 28,000 crore currently and it has been growing at a CAGR of 15% over the past few years. Western snacks comprising mainly of extrudes and bridges are a Rs. 16,000 crore segment as of now. We expect to maintain or accelerate this growth going forward, given the speed of the movement to the organized market, supported by healthier consumer choices and regulatory changes like GST, etc.," says **Shaswat Goenka, Sector Head - Spencer's Retail Ltd, RP Sanjiv Goenka Group**, adding that the number of healthy snack options available in the market today have multiplied tremendously. "This trend is further influenced by the high visibility and success in sports, fitness and proliferation of health centres and gyms, communication around health measurement and monitoring devices, as well as by relevant and strong messages from leaders, sportspeople, health experts and celebrities."

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Although, the Indian snacks market continues to be dominated by potato chips, salted savory snacks and traditional sweets, and new flavors are on the rise.

The branded snacks segment is expanding at the rate of approx. 15% per annum whereas the entire market is growing at the rate of 7-8 per cent. Namkeen is a product essentially known for three important attributes: a) Taste b) Quality c) Variety. To elaborate further, namkeens can be characterized into three segments as:

- ▶ **Single product segment:** Moong Dal, Chana Dal, Peanut, Nut Cracker, Karare Peanut, Heeng Jeera Peanut, Masala Matar, Mathri, Namkeen Pare, etc.
- ▶ **Single product in bhujia:** Plain Sev, Bikaneri Bhujia, Aloo Bhujia, Punjabi Tadka, Ratlami Sev, Bhavnagri Gathiya, etc;
- ▶ **Lots of mix:** Navratan Mix, Khatta Meetha, Chatpata Mix, Magic Mix, Royal Treat, Kanpuri Mix, Bombay Mix, Kaju Mix, Kashmiri Mix, All in One, etc.

The namkeen market is divided into two categories: the first category of Indian & ethnic snacks comprise about 60-65% of market share and the rest belongs to the Western snacks category comprising extruded snacks and chips. There is also the inception of a third type of savory being developed and called “bridge snacks”, in which the taste and flavor is local but the product format adopted is Western. These products are available in a very few high-end outlets.

Indian and ethnic snacks are in the traditional fried category and also a leading trend in the market. Western snacks are of roasted category and is a quickly growing segment in India with the inception of low fat products. However, it may take several more years to develop this category for the market. The health category is also developing as a separate one. Traditional snacks boast of proven human craftsmanship, including cooking and frying by hand. About five years ago, packaged namkeens have come to replace western snacks such as potato



chips and finger sticks as the largest segment within the branded salty snacks market in India. During this period, Indian namkeens have grown at faster pace @ 24-25% as compared to western snacks growing @ 12% overall.

The western snacks category is dominated by multinationals who are equipped with automated machines with a high production capacity. In the past four years, Indian namkeens is growing at faster pace @22-25% (approx.) as compared to western snacks growing @12-15% (approx.) overall. Again, this market is divided into three categories comprising kids, teenagers, and adults. The kid’s category calls for new packaging and products that are soft, chewable, spicy, and also come with offers of freebies. Kids are always ready to adapt to new flavors and due importance has been given to this aspect by offering new flavors as Schezwan, Peri Peri, Wasabi, and more.

The category of gourmet snacks is fast gaining acceptance with more and more Indians owing to globalization, overseas travel, and exposure to new products and flavors. International gourmet snacks are now widely available at supermarkets and modern trade stores. But this wasn’t always the case. Tortilla chips and nachos are culinary delights from Mexico and are independent product categories in markets such as the United States and Mexico.



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The nachos category is growing 14% less in 2018 as compared to the past year because consumers are now adopting healthier and innovative snacks like veggie nachos, which are made using a vegetable extract blended with corn. Another important aspect for the category is product innovation. Companies and brands should look at providing healthier snacking options with an extended shelf life. A longer shelf life helps retailers to avoid issues

→ FUTURE TRENDS IN THE GROWING SNACKS SPACE

Animal Brews: While there once was no question that animal-based options in the snack category was extremely limited, this reality is changing now. Products here include cold-pressed coffee mixed with butter from grass-fed cows, bone broth, and broth mixed with such functional ingredients as cayenne, turmeric and flaxseed oil. These types of products aren't designed to be "guzzled down with a snack," but to replace meals altogether.

Liquid Feasts: The line between beverages and soups appears to be blurring. Products such as chilled vegetable soup packaged more like a cold-pressed juice; elixirs with super-herbs, roots and fungi (e.g., turmeric, matcha, maca and reishi); and fiber-forward veggie beverages that look more like salad than soda.

Uber Chocolate: Chocolate is no longer about just basic dark, milk and white offerings. New products on the market include cocoa with tea, algae and herbs traditionally found in the supplement aisle; hot chocolate with reishi mushrooms, which promote a calming effect; and bars in which milk solids are swapped for stone-ground cashew

butter to provide non-dairy protein.

Bars With Horsepower: New protein-packed bars on the market look more like a compressed feast than a small snack. Some of the latest ingredients include animal proteins (e.g., chicken), sweet potato, cranberries, pumpkin seeds, turmeric, ginger and beets, contributing both protein and fiber to diet.

Comfort Veggies: New root and other vegetables are taking the place of potatoes in snacking, with new offerings including fried chips made from sliced onions, non-fried jicama chips boasting added fiber, and even chips made from fresh-pressed veggies leftover from juicing.

Build Your Own Adventure: Snack packs are going gourmet with high-quality cheese and unique breadstick flavors (e.g., tomato and herb), superfood-enhanced peanut butters and non-peanut nut and seed butters with pretzels. Additionally, products such as portioned packets filled with manuka honey, which often is sold as an alternative medicine, address consumers' desire for something sweet that also has healthful attributes.



related to expiry of products. According to studies, analysts forecast the global tortilla chips market will grow at a CAGR of 7.42% during the period 2017-2021.

In the snacks segment, new launches and investments have followed a set pattern – there is a tendency to follow leader brands. This has led to the growth of me-too brands. The blue ocean strategy, which involves putting a differentiator brand or idea in place and creating more value for the consumers, should be followed. The Hotel/Restaurant/Café (HORECA) revolution going on India is also opening up new avenues for nachos. Tapas bars and quick service restaurants (QSR) are ruling the roost and they are depending on such products as important elements of their offerings. The new India has developed a taste for worldly flavors and consumers are becoming conscious of what they are consuming.

The snack food market is discretionary expenditure and has seen the impact like any other FMCG product- there has been shrinkage in the consumption basket. Other Snacks is the largest segment in the market and is also the one that has the most new launches. Other Snacks comprise a very large variety of regional snacks including Mix/ Mixtures, Chivra, Sev Bhujia, Banana Chips, Lachcha, Gathia, Murukkus, Papri & Ribbon Snacks as well as branded snacks such as Pepsico's Kurkure & ITC's Bingo. Many large companies including Parle & Perfetti van Melle are entering this category through Other Snacks with their products Full Toss and Stop Not, for example. Pepsico's Kurkure is the leading brand in the branded snack foods market and is a variation of Cheetos without a cheese flavor but with spicy Indian flavors.

Why the Big Boom in Snacks and Snacking

Consumers are increasingly enjoying snacks between meals, as well as employing them as meal replacements. Snacking is no longer seen as a guilty pleasure but has instead become an eating occasion in its own right, and snack foods will

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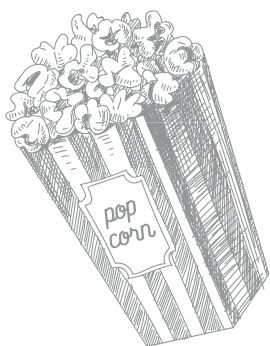


With increased frequency of snacking comes a growing demand for snacks that couple substantial nutritional value with convenience and a variety of appealing textures and powerhouse flavors that satisfy.



continue to evolve to meet the needs of constantly on-the-go consumers. When it comes to replacing meals with snacks, younger consumers are most likely to engage in this behavior: More of younger Millennials indicate that this is common practice for them, the most of any age group. Lunch was the most common meal to be replaced by a snack with breakfast was the second most-common meal to be replaced. Among all food categories, snacks are an innovation machine, and flavor innovation is critical to the category, acting as a tailwind and spurring the rise in snacking occasions.

And with increased frequency of snacking comes a growing demand for snacks that couple substantial nutritional value with convenience and a variety of appealing textures and powerhouse flavors that satisfy. But some things haven't changed. Taste is still No. 1 when it comes to choosing a snack. But Millennial consumers are also looking for a short list of trusted, real, whole or "clean" ingredients that satisfy hunger and provide idealized quality, which extends to exotic or premium halos and specific attributes regarding how the food was sourced and produced. In particular, they're thinking about how their purchase may impact personal factors, societal concerns such as the local community or economy, worker and animal welfare, and global sustainability of the environment and the planet.



Individuals may look to snacks to satisfy a variety of needs, including a desire for a particular nutritional attribute, flavor or texture; as a source of energy and appetite satisfaction; for replenishment and recovery after physical activity; as a de-stressor or for emotional comfort, or as a way to relax or indulge. Snack selection may look completely different for a person snacking alone compared with when snacking with children or others. Not surprisingly, children are the biggest influencers when it comes to purchasing snacks, according to Mintel's 2017 consumer trends research. A majority (69 percent) of Millennial moms say that their kids understand that some snacks are healthier than others. Data also suggest that parents are willing to pay more for a better-for-you snack if they know that their child will eat it. This presents an opportunity for retailers to conduct better-for-you snack-sampling events specifically geared toward customers and their kids. Right-sizing portions to appropriate snack sizes is a key part of positioning convenience or on-the-go snack options.

Snacking is one of the top three fastest growing FMCG categories and it is likely to accelerate due to the transition to the organized segment of the industry. There is a high level of innovation and marketing activity happening to cater to the impulse demand from consumers. Healthy snacks with ingredients such as fiber and high protein content beneficial in improving digestion will increasingly support the market growth. Additionally, ongoing R&D activities in healthy snacks to add healthy ingredients for better nutritional support will further fuel the growth of healthy snack market, reveals Goenka of Spencer's Retail.

In general, trial of new snacks is highly influenced by recommendations, ratings and reviews. Research shows that 37 percent of Millennials have tried a snack because of a social media post made by someone else. Retail dietitians, as trusted influencers, can regularly introduce shoppers to specific snack items, trends and recipes using social platforms and other media. Shoppers are looking beyond the packaged snack aisle to functional snack foods found among fresh produce, prepared foods, the dairy case, bars and nutritionals, and center store's canned poultry and fish. Popular attributes sought include protein, probiotics, natural fiber and omega-3s.

The increasingly powerful snacking trend and growing demand for foods and beverages with unique qualities – natural, functional, energizing, satiating and convenient – are causing consumers, manufacturers and retailers to rethink the traditional snack category, with products continuing to evolve and lines increasingly blurring.



Temptation for your taste buds

delightful chocolates

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creamy & crunchy wafers



bouquet of biscuits



By tweaking their product offerings to suit the taste of Indian consumers, snack brands have launched new variants of the products to cater to region-specific demand, which has widened the consumer base.

Demand Accelerators

Innovative products & variants: The Indian snack market has always been known to surprise and delight its consumers with innovative and great tasting offerings. The new flavors are inspired by the food culture and the fun spirit of Indians. By tweaking their product offerings to suit the taste of Indian consumers, snack brands have launched new variants of the products to cater to region-specific demand, which has widened the consumer base. For instance, in biscuits alone, there are more than 34 varieties to choose from, providing customers with a wide range of variety. Similarly, Mexican snack nachos are available in more than ten International flavors to cater to the Indian palate.

Product features and attributes: Taste followed by health figures prominently as the factors influencing the choice of snacks by Indian consumers. As per Mintel’s research, almost one in three (29%) adults who snack said taste was their priority when it comes to choosing a snack followed by health, which was chosen by 25% of consumers. Products that get the elusive balance of health and indulgence right stands to gain the most.



Taste is the most important criteria in the choice of a snacking product. Indian consumers are looking for snacks that are fresh, crisp and flavorful. Freshness is also one of the top criteria in choosing a snacking product. While nearly three-quarters of consumers wish there were healthier snack options, more than three in five agree that taste is more important than how healthy the snack is for them. So to keep the balance between Health & Indulgence is the mantra for success in snacking segment.

Price points: Adoption of low-cost pricing strategies to make the product affordable for consumers has also enhanced the consumer base for the snack category. Price is a primary factor in snack purchases, particularly in rural areas, which tend to be characterized by lower levels of disposable income. Consequently, the affordability of small pack sizes plays an important role in stimulating demand in the rural regions. Consumers are always tempted to shift their choices and preferences whenever new products are launched or various marketing and pricing campaigns of different brands are introduced.

Brands are coming up with unique propositions for customers and matching the product’s features with smart packaging and attractive price points (MRP Rs. 5 and Rs. 10 pack sizes) to convince them to consume more. A meticulous pricing strategy that makes snack brands accessible at affordable price points is one of the biggest USPs why snack products are now being bought by all sections of consumers.

Looking at snack food consumption and how it has evolved over the past five years and how the category will develop in the future, analysts say that snack foods that will grow in the near term are ones that embody wellness benefits, like snacks with more protein; portable snacks that fit into busy lives; and ones that feature unique flavor mashups. Even indulgent snack foods are staging a comeback by walking a line between health and enjoyment. Low-calorie, high-protein ice-cream is one such example of a beneficial snack food that meets consumers’ desire for decadence. Brands that support moderation as a rationale to indulge are also benefiting, like thinner versions of cookies.

So, snack foods will continue to evolve, both as between-meal snacks and as part of main meals and each of these snack food roles is changing in different ways in reaction to consumers’ desire for balance, portable snack foods and holistic wellness. Also, consumers’ snack food choices aren’t limited strictly to flavor and the emerging attributes for snack food consumers will be items that encompass uniqueness and sensory elements such as texture, heat and aromatics. Snacking is no longer just about eating when you’re bored, or eating for additional sustenance. Today and in the future, snacking is

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Where trans-fats and artificial flavors once flourished, now easily identified ingredients like 100 percent virgin coconut oil and pink Himalayan salt are making inroads in packaged popcorn and other salty snacks.

about solving small problems for consumers and those problems present opportunities for food marketers across a variety of dayparts and needs.

Retail Play

With consumers looking for all natural, gluten-free, non-GMO products, the healthy snacks category is growing too. So, retailers need to allocate more shelf space in their stores and give more weight to the category. Retailers need to support the brands by pushing for the healthier variants of the existing products. Even those retailers who do allocate more shelf space do not mark the categories with their specialties (like gluten-free or non-GMO). Retailers should encourage non-GMO, gluten-free and vegetable snacks in the snacks category. Better category management will not only help the retailers but also the consumers who are looking for better-for-you products.

Retailers who want to grow sustainable sales and increase customer traffic need to capitalize on the important trends. The ones who make snacking easy through effective merchandising, pricing, and promotion strategies that focus on shoppers wants and needs will help drive sales throughout the store. There is no doubt that the growth of modern trade too has helped stimulate a revolution in the packaged snack food industry in India. According to Euromonitor, the snacks category is expected to grow by 14% CAGR during 2015-20 in retail value terms at constant prices.

But while healthy and better-for-you snacks are growing fast and there is a huge headroom to expand the category, many retailers confirm that they are also experiencing flat or declining sales in many traditional cookie, cracker and salty snack options. To take advantage of this swing in demand



away from traditional “junk food,” retailers and manufacturers are now earnestly leveraging the healthy halo of complementary products. Retailers are creating a better-for-you snacking center in their stores, which allows them to bring new items in quickly. The better-for-you snacking displays are delivering more incremental sales growth than traditional snacking items and so retailers are encouraged to leverage product identifiers for organic and gluten-free items as a way for customers to easily identify those items.

To maintain the momentum, retailers are actively collaborating with snack food suppliers by sharing current sales trends and data to ensure that suppliers have the most current data for making base retail and promotional retail decisions. This collaborative approach also allows suppliers to react quickly to leverage best-in-category retails and tactics to drive additional sales.

Retailers and brands should join hands to promote snacks by helping consumer to shop better and buy products that suit their taste preferences. This can happen only with the combined efforts of the manufacturer, retailer and consumers and will help pave the way to even bigger innovation in the snacks category. Today, the faster pace of urbanization gives manufacturers immense opportunities to venture into new regions across India and promote their brands. Especially in the case of regional players, they are strong contenders in their home turf to sell their products in the neighboring states and tier I and II cities. However, other regions are left unexplored due various reasons: product awareness in the market could be weak, consumers’ exposure to the product could be low and/ or because of logistics issues. In such cases, manufacturers can outsource their product manufacturing to a local franchise and then support it in the marketing activities. Taking such an approach can help the brands sell their products to the neighboring markets.

Distribution remains a key component for any brand; therefore the challenge for local players is to strengthen their distribution networks and expand their retail reach. The eagerness of companies to



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Consumers looking for healthy alternatives to classic fried potato chips are sampling options that include nachos, dehydrated vegetable chips, roasted and baked chips and popcorn.



penetrate newer markets and make their presence felt is seen in the new strategies adopted by them. From exploring the online channel to having dedicated teams working on the expansion of retail, brands are leaving no stone unturned. As e-commerce is witnessing a tidal surge, brands should actively pay heed to this new trend. Their products should be available on leading grocery e-tailers, and they should continue to launch new combo packs to give an enhanced presence to their brand in the retail space besides conducting extensive wet sampling in top modern retail outlets to promote healthy snacking.

Way Forward

Going forward there will be increased focus on continuous product innovation to stay relevant and combat competition. The other major challenge will be to get it right on the packaging, taste, price, and local trade practices for specific regions. Indian consumers are increasingly inclined to quality, well packaged snacks as these are commonly associated with greater credibility, longer shelf life, and better product.

Snacks in small packages will become highly relevant in the Indian market. The demand for small snack packs has increased considerably over the past few years, especially in the rural regions of India. This is because price is a primary factor in snack purchase and small pack sizes can be marketed at lower unit prices, making the product more affordable. As consumer loyalty is low in snacks, small snack packs, besides being portable and convenient, are an effective way for manufacturers to constantly engage their consumers through frequent introduction of novel flavors and offerings.

However, the long-term beneficiaries will be those that manage to engage the consumers with innovative and unique products for Indian consumer with the products having the right mix of quality and affordability. Only those who strive to provide differentiated offerings of high quality and taste to the consumers will stand to gain and benefit. "Retailers believe that the two most important factors that will drive the growth of the snack category are a commitment to healthier choices and diversity in offerings that appeal to niche consumers (i.e. organic, gluten-free, etc.). There exists a big opportunity for retailers and manufacturers to shine the spotlight on the latest choices for health-minded snackers through sampling efforts, consumer education and unique promotions," opines Goenka of Spencer's Retail.

Going ahead, the snacks category in India will see the launch of new health-orientated savory snacks, including multigrain products, low calorie products, and snacks with low levels of fat and cholesterol. The range of snacks tailored to local tastes will broaden as regional players expand and international players develop their brands more. Niche western snack like tortillas will gain in prominence in the Indian sub-continent and so will the traditional Indian snacks like namkeens, bhujia, daal, bhakarwadi, khakhra, chakli, kodublae, which were mostly region-specific.

Companies have immense opportunities to venture into the un-captured regions across India. Especially in the case of regional players, they will emerge as strong contenders in their home turf to sell their products in the neighboring States and Tier I and II cities. However, there will still remain some regions that will be left unexplored due to a weak audience or logistics issues. Therefore, companies will do well if they can outsource their product manufacturing to a local franchise and support them in the marketing activities, which can help the brands to be sold to neighboring markets. **PG**

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



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Bringing the goodness of Japanese snacks to the Indian market

→ Company and brand profile: Daawat-Kameda (India) Pvt. Ltd., founded in 2017, is a JV between Indian food conglomerate LT Foods Limited and Kameda Seika of Japan. LT Group is owner of popular Basmati rice brand Daawat and has varied business interests in rice, organic food & snacks.

Kameda Seika is the leader in Japanese rice cracker market with about a 30% market share. Daawat-Kameda, under the brand name Kari Kari, is an initiative to sell rice-based snacks in India and it will offer the crunchiest snack in the Indian market in four different unique flavors.

The new company will locally produce and sell rice crackers towards the expanding Indian snack market. The entry into the premium snacks market is part of the company's aim of becoming global speciality Food Company and making an impactful presence in the INR 30,000 crore Indian snacks market.

Consumer segments and demographics: Health is a key area of concern and it has already pervaded the space of snacking due to the success of health-centric snack options like multigrain, baked snacks, sugar-free CSDs, diet versions of traditional Indian snacks, low fat energy bars, etc. The brand is targeting the millennial consumer who is young, urban, modern, very well-travelled and exposed to global trends.

Brand's USP and differentiators: Kari Kari is a very unique and modern snack and it is inspired by the famous Kameda Crisp, a favorite rice snack in Japan. This

premium Japanese snack offers an exciting and irresistible new taste of crunch. Light and crispy, these savory rice crackers are mixed with peanuts to make a hearty, wholesome snack with a delicious tangy twist. These are baked, rich in protein and contain no trans-fats, giving you a healthier snack that is perfect for every moment – when you are at party, on-the-go, in office or even on the couch.

Trends and developments in the category: The snacks food industry in India is highly competitive and evolving. Consumers are always tempted to change their choices and preferences whenever new products are launched. The changing taste and preferences in consumer demand is leading to several innovations in product formats as well as in packaging. The demand for tasty snacks with healthy ingredients like fox nuts, popcorns, and quinoa puffs, etc., is growing very rapidly. Today, consumers are very particular when it comes to snacking. They choose snacks according to their consumption occasion/location. Snacks consumption is also associated with one's status. The demand for international flavors like wasabi, peri peri, etc., and for international snacks like nachos, is also increasing.

Market outlook and opportunities: Premium & healthy snacks are still in a nascent stage with a market size of INR 900-1000 crore, and growing at 22-25% p.a.. The premium snacks category is dominated by several indigenous and international flavoring snacks. The high growth rate is also attracting new

entrants in the industry. The Kari Kari brand is targeting a 5% market share in its first three years of launch and an 8% market share in the next five years.

“



Snacking is a very exciting category, which is growing at a very fast pace. A growing work force with decent income and changes in our lifestyles are leading to higher customer demand for healthy and premium packaged food options.

– Ritesh Arora
Business Head, LT Foods Limited

Retailing strategy: Modern trade is going to be the focused channel for the Kari Kari brand. The brand shall have a presence in all MT formats across target markets. It has seen a strong demand from E-tailers/ E-Grocers in the category and this channel shall play a vital role for the brand. As far as GT is concerned, the brand shall be launching special SKUs for GT and will be tapping all high-end and stand-alone GT outlets across target markets. As there is a huge consumption of snacks on-the-go, the brand will also leverage alternate channels such as HoReCa and vending machines.

Future plans and roadmap ahead: The brand has already set up a state-of-the-art manufacturing facility in Sonipat (Haryana). It is being constructed with the same standards as of Kameda's Japan manufacturing units and is going to be one of the best facilities in India. Some new products are in the pipeline and will be launched soon. The brand plans to enter Modern Trade and E-commerce by the end of this year and GT, stand-alone and alternate channels by 2021.



Providing baked snack products for health-conscious millennials

→ Company and brand profile: Lovely Bake Studio, a premier European inspired bakery, offers an unmatched range of 100% eggless delicacies to its customers. It is a first-of-its-kind concept in north India. In the past five years, Lovely Bake Studio has become one of the fastest growing FMCG companies with a presence in 40 cities, two States, in over 15 airports and a shelf space in over 3,000 retail outlets. The company has growing exports to the Middle East, Chile and the US.

Product portfolio: The brand offers its customers a variety of eggless temptations in cookies, biscuits, rusks, dry cakes, namkeens, baked snacks, frozen snacks and sweets, festive gift packs, special sweet packs and much more.

Consumer segments and demographics: The target audience of the brand is the average Indian family. It offers products that are made to delight the youth, parents and grandparents. It wants to be a part of tea-time, snack-time, and break-time in every household.

Brand's USP and differentiators: The brand's USP is its premium ingredients mix and unique recipes. Its R&D team of food experts ensures a thorough development process of the products. The brand is able to impart quality and taste in every bite of its products by using the best ingredients from around the globe, keeping up with the latest trends and industry development, as well as by perfecting every small process and detail of its recipe for a lip smacking taste in every bite.

Lovely Bake's product range is so unique and innovative that the brand gets enquires from retailers to stock its range. An example is its innovative three-piece rasgulla pack, which has enabled its consumers to taste their favorite sweet anytime, anywhere, as it is easy to use and dispose of. Its health infused granola bars is another popular innovative product, which has been appreciated by consumers

for its great taste and for debunking the popular myth that healthy products cannot be yummy!

Trends and developments in the category: India has one of the largest consumer bases in the world, which also has a high propensity towards food and beverages. Research analysis points out that consumption has increased dramatically with an increase in the fast-paced lifestyle, rise in the number of double income homes, growing number of women in the workforce and young professionals living by themselves. Also, Indians are increasingly leaning towards socializing at home and there is also a growing acceptance of western food and the need for on-the-move cooked foods. These are key factors that are driving the increase in demand for namkeens, baked snacks, cookies, frozen snacks, sweets etc. These products are also a great serve to guests at parties, a good conversation starter amongst friends, and an ideal comfort food when alone.



Market outlook and opportunities: The estimated bakery market size is pegged at Rs. 6,000 crore annually and it is expected to grow at the rate of 25% in the years to come. The brand's target is to capture a 10% share of the category and continue to grow thereafter.

Retailing and marketing strategy: The company believes in encouraging live product sampling in malls, which helps it to draw customers to the stores. It has in place certain lucrative inaugural offers and special day offers for consumers, which allows it to reach more households. Through an interactive social media presence across platforms like Facebook and Instagram, the brand is able to connect seamlessly with the consumers and also able to get direct and more effective feedback from them. To enhance its brand visibility, the brand makes use of CRM and other marketing tools, which allows its customers to know more about its products, flavors and its retail presence across the country.

Future plans and roadmap ahead: Lovely Bake is soon going to launch several exciting products in categories such as snacks, cookies and organic. In every new state and city that the brand ventures into, it builds a pool of employees that can effectively service the area as well as grow the business locally.

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With the general public becoming more health conscious, everyone is now experimenting with the baked category. New flavors are being welcomed by the consumers. New products will be developed in this category, which will evolve into many new forms and directions.

— Shaishav Mittal
Founder & CEO, Lovely Bake Studio

Offering natural health and wellness products from across the world

➔ **Company and brand profile:** Sixth Element, launched in 2013, has become a prominent online and offline store at Khan market for natural foods in India offering premium quality superfoods under one umbrella. Its complete natural food range is pure, rich in nutrients, additives-free and healthy. Sixth Element imports these hard-to-find natural and healthy products from across the world, including cacao powder, camu powder, chia seeds, goji berries, palm sugar, quinoa super-grain, trail mix and many more. In 1998, the founder - Gurvinder Singh - established Global Gadgets. With this venture, he started importing products from different countries and was exposed to the concept of 'superfood'. It was the founder's thoughtfulness and desire to contribute to the society, which led to the inception of the wellness brand Sixth Element.

Product portfolio: The Sixth Element brand has many products as its offerings in the snacks range: quinoa crisps in wasabi and chilly lime flavors; flax seeds; roasted pumpkin seeds; heeng pumpkin seeds; roasted seed mix; trail mix oregano pumpkin seeds. Its products in the superfoods range are chia seeds, goji berries, black rice and millets. The products

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Sixth Element products are healthy, full of nutrients and energy providing. We are looking at introducing more superfood products and promoting their use in five-star hotels and top restaurants.

Gurvinder Singh
Managing Director, Global Premium Health Foods Private Limited

range from exotic super grains to delicious honeys, exclusive teas to delectable bread spreads, healthy snacks to tasty butters.

Customer segments and demographics: The brand targets all the urban upper class consumers who are avid travellers and are exposed to different cultures of the world. This customer segment understands the value of a product that is offered to them. The brand caters to a broad range of customers irrespective of their age. Healthy and organic food is popular amongst health-conscious people. These products are targeted at affluent families as they are invariably expensive and only premium quality raw ingredients are used in these products, which are imported from across the world.

Brand's USP and differentiators: The brand's biggest USP is that it checks its products and packaging to be natural, gluten free, non-

GMO, wheat-free and vegan-friendly. All the products have a basic essence to it, which is providing energy to all its customers. Everyone wants to be energetic throughout the day and the brand helps customers to remain active and energetic. Junk food affects the body adversely. However, Sixth Element's products are healthy, full of nutrients and energy boosting. The human body is made up of five elements – earth, water, fire, air and space – and Sixth Element is the superfood that gives energy to the body. The brand is passionate about bringing to its customers the best from all over the world and its portfolio encompasses 50 products approximately under its umbrella. These products are nutrient rich and have all the three nutrients – protein, minerals and vitamins that a person requires. This brand has brought in some of those superfoods that Indian consumers didn't have the exposure to. Many of these products were introduced in the market just 8-10 years ago and are still relatively new. However, Sixth Element products have successfully managed to create its own niche category and market in the country. In the spirit of building awareness and to highlight the need for a holistic diet, Sixth Element, in collaboration with the Indian Culinary Forum, organized a seminar to introduce and promote superfoods in five-star hotels and top restaurants.

Retailing strategy: Sixth Element products are available in more than 40 stores across south Delhi and Gurgaon – Foodhall, Le Marche, Modern Bazaar – and 24x7 stores, to name a few. Its products are present in all five-star hotel chains like Le Meridien, Oberoi Hotel, The Park and Taj Hotel chains. The brand is focusing on covering all the high-end retail stores of south Delhi and Gurgaon and is aiming to capture its potential TG in these stores

Future plans and roadmap ahead: Sixth Element also aims at expanding its reach and visibility among all high-end retail stores. The brand's future plan is to open many holistic wellness stores of its own in Delhi and Gurgaon.



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Bringing traditional foods with a modern twist for consumers

→ Company and brand profile: Fespro Foods is a vibrant and diverse company providing high quality and safe products under brand name Fespro. The brand aims to conserve traditional values and operates in key consumer food categories – pasta, culinary cooking pastes, and nutritional bars.

The company is guided by the principles of mutual trust and transparency and has a team of food technologists and food professionals to take care of the product development, improvement in existing product range and maintaining quality standards.

Consumer segments and demographics:

Fespro is targeting working people in the 18-45 age group, including housewives, school and college students.

Brand's USP and differentiators:

Fespro Foods aims to conserve the traditional values but with a twist. The major motivation for the brand that drives all its product development activities is to convert traditional ingredients into contemporary products. Fespro tries to make changes in the products according to the evolving tastes of the consumers. The brand modernizes traditional ingredients while maintaining its authenticity and keeping its essential values intact.



We are continuously working to develop and provide nutrition, health and wellness category products and are committed to the achievement of success with integrity, honesty and fairness.

— Sakshi Maheshwari
Brand Manager, Fespro Foods

Trends in the category: A lot of innovation and disruption is happening in the snacks category. Brands and companies are offering convenient and 'ready-to-eat' products. There is a boom in the 'savory oats' segment. Indians are more likely to have a hot breakfast and that makes them feel satiated.

The brand has recently launched its 'insta' range of products, which consists of Omega (3-6-9) (veg source) enriched

instant oats in masala, veggie and tomato flavors along with instant tea (ginger, cardamom & masala) and insta poha. In the pasta category, it has introduced pasta made from superfoods like ragi, quinoa, 7-millet and whole wheat.

Market outlook and opportunities:

Consumers today are more inclined towards convenience food. Pasta is considered a convenience food as it requires less cooking effort. This particular factor supports the growth of this category. Globally, the market value for pasta was estimated at 11 billion USD in 2017. In the Indian context, the pasta category was valued at 286 million USD in 2017 and is expected to reach 709 million USD by 2023, growing at a CAGR of about 16.8%, annually from 2018-2023.

Fespro products sell at a very attractive price band – the retail prices are designed in such a manner that even the middle class / upper middle class segment of consumer can impulse buy and try the products. The Fespro brand clocked sales of INR 6 crore in FY 18-19.

Retailing strategy: Fespro's major contribution comes from Modern Trade, which is roughly 80% of its overall sales. The share from General Trade accounts for the rest 20%. Initially, the brand's journey started with product placement in leading Modern Trade outlets. Currently, its products are available in 800+ outlets across the country.

Future plans and roadmap ahead: The brand aims to grow its turnover and is planning to reach INR 700-900 lakh this fiscal. India has 5,000 plus Modern Trade outlets and so the brand's gameplan is to place its products in as many of these Modern Trade outlets as possible. This will help in increasing its reach to customers and consumers. At the same time, it is also steadily adding up its count of General Trade outlets as well and has started operations in a few cities in the General Trade channel.



The market leader in snacks in east India

→ Company and brand profile: Haldiram Prabhuj, with its humble beginning in 1937, has emerged as a household name for ready-to-eat snack foods in India. It has come a long way since starting as a small snacks shop in Bikaner, Rajasthan to delivering a veritable range of ready-to-eat snacks that are healthy and hygienic. The group has its presence not only in India but in several other countries around the world.

Product portfolio: Haldiram Bhujawala Limited, under the brand name Haldiram Prabhuj, sells all the great Indian snack delicacies under its banner: namkeen products –chanachurs, mixtures and dalmoth; sweets –rasgullas, gulab jamuns, pethas; and baked products like dundee cakes along with syrups and pickles. It has recently launched a new brand ‘Minutes to Go’ for the RTE category.

is a prominent player in east India with a majority market share in organized packaged traditional sweet and savories.

Retailing strategy: The brand is extensively focusing on improving its presence in both General and Modern Trade channels. Currently, GT is the brand’s major sales channel, contributing 70% of revenue; Modern trade, institutional sales and exports constitutes the rest. Haldiram Prabhuj is strategically targeting Tier 2 and Tier 3 cities/towns using the General Trade route as there is major growth expected from these areas. In Modern Trade, the brand is operating and present in all major retail chains.

Future plans and roadmap ahead:

Haldiram Prabhuj is targeting for a Rs. 2,000 crore revenue by 2024. The brand’s long-term plan is to become a food conglomerate in India, taking over the market with its traditional namkeen, sweets, confectionery, bakery, ready-to-eat, staples, and pickles.

Recently, the company has also acquired a retail chain of coffee, tea and ice-cream with a pan-India presence of more than 90 stores. So, it has almost 100 stores operating under Haldiram’s Prabhuj portfolio.

The company is investing further in its state-of-the-art production facility, which will result in better quality and enhanced shelf life of the products. The company is also investing in information technology to support the front end sales force, distributor, retailer and channel partners. The brand’s team is also planning to create a food platform for featuring a new segment ‘ready-to-eat’, bakery, and staples along with tradition sweet and savory products.

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We want to become a food conglomerate in India, taking over the market with traditional namkeen, sweets, confectionery, bakery, ready-to-eat, staples, and pickles.

– Manish Agarwal
MD, Haldiram Bhujawala Limited

USP and differentiators: Haldiram Prabhuj only uses fresh produce in its products. The brand reconnects you with food made out of fresh produce like seeds, fruits and vegetables, using the latest in healthy food preparation by expert chefs who know their food and uphold certain values like taste, time, ecology, thrift and community. With state-of-the-art food preparation technology, use of modern and hygienic equipment, state-of-the-art packaging and clinically tested ingredients, the end product is truly lip-smacking.

The brand’s research & development team is always looking to make the food more durable at its best quality. The team focuses on maintaining the authentic taste of the recipe over a long period of time so that a snack from any part of India would taste the same in any other part within the stipulated time.

Market outlook and opportunity: The Indian sweet market is about INR 8,000 crore and namkeen market is about INR 28,000 crore. Currently, Haldiram Prabhuj is present in traditional namkeen, sweets, confectionery and bakery, ready-to-eat, staples, pickles, The brand has almost an equal share of revenues from sweets and namkeens. Haldiram Prabhuj

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Our focus has always been the masses. We want our snacks to reach every house and hence we are very sensitive about the price without compromising on the taste and quality.

– Prabhu Shankar Agarwal
MD, Haldiram Bhujawala Limited



Offering a range flavored healthy snacks and dips at affordable price points

→ Company and brand profile: Snackible & Dipsters was inceptioned in 2015 under Lightsaber Food Ventures Pvt. Ltd with the aim to revolutionize the snacks industry by introducing a premium range of healthy, tasty and reasonably priced snacks, which are conveniently accessible across the country.

Product portfolio: The company's product range is completely different from the snacking options available to the consumer. For instance, its dips range is much diversified and flexible, which allows it to cater to a bigger consumer group and gives it an edge over other snacks brands that have a linear product line. The range of unique dips along with ragi chips, waffle chips and mini biscuits allows the company to target a larger consumer base – in the 10-35 age group – which is bigger than the TG of many other snacks brands.

Snackible's range of dips is not constricted to only snacks lovers; rather its chocolate and hazelnut dip is also very popular with school-goers and chocolate lovers as well. Similarly, Snackible's other snack options such as makhani, cheesy jalapeno, spicy mayo and cheesy cream dip are a hit with adult consumers.

Brand USP and differentiators: The brand's basic competitive USP are: Chips and dip combo at an affordable price; Low oil usage, low cholesterol, and low trans fat; Consumers can enjoy snacks on-the-go; Added chocolate and hazelnut variant in a snacks product line. As a snack brand, Snackible stands apart on the pricing front and offers products at an affordable price point of Rs. 35 only. The affordable and competitive pricing of Snackible products ensures that the brand is able to reach out to a larger consumer base, including the middle-class as well as upper-middle class segments of society.

Snackible's product line is designed to bring both the snacks lovers and dip lovers under a single umbrella and create a whole new consumer base for the brand. Snackible's product range keeps

introducing new additions in flavors as per the market requirement. Moreover, the brand's range of products cannot be replaced or substituted as the products can be consumed during office breaks, school breaks, while enjoying a movie or travelling in an airbus, and on many other occasions as well.

The company has also invested in and introduced Italian M.A.P technology to extend the shelf life of its products while maintaining its focus on introducing fresh and flavorful products that continually meet consumers' expectation for brand quality and consistency.

Retailing strategy: The company maintains different set of strategies for operating in General Trade and Modern Trade. Some of the basic strategies that it follows in General Trade are: Maximization of registered outlets by ensuring a presence in every Grade A and B stores in every active town; Emphasizing on product visibility and merchandising at retail level; Appointing good channel partners, especially who are

associated with snacks brands to ensure that the brand reaches its target outlets through their distribution network; Keeping a systematic balance between primary sales, secondary sales and tertiary sales to check unnecessary stock damage.

For modern trade, the company's basic strategies are: A launching scheme for consumers at every newly launched MT chain for the first quarter; Recruiting adequate sales promotion team and conducting a hygienic sampling campaign at every leading MT store; Making



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It is important to focus on the length and breadth and not on the depth of the distribution, at least in the initial years of operation. As such, we are strengthening our retail and supply chain systems by providing a lucrative margin to all channel partners.

– Abhinav Biswas
AVP Sales & Marketing, Snackible

retailers conscious about healthy snacking habits; Conducting consumer engagement activities at MT stores to rope in new consumers; concentrating on online chains wherever there is an opportunity for product placement.

Future plans and roadmap ahead: The company plans to come up with a large number of mass market products based on price, size, shape, and flavor. It is also planning for incorporating greater value addition at regular intervals based on Indian festivals – like adding a special packaging with pocket friendly price to bump sales three-fold during the festival season. The company is working on this strategy for the upcoming Rakhi Festival and will be launching its 4-pack combo.

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Bringing unique snack options for consumers

→ **Company and brand profile:** Innovative Foods Limited (IFL), since its inception in 1989, has been a major player in the Indian food processing industry. Operating under the brand name Sumeru – it manufactures and markets a range of ready-to-eat veg, non-veg and sea food products. It also supplies customized products to leading food service companies in India. The brand's core business includes imports, exports, trading and manufacturing of processed & frozen food.

The brand has a presence in all major modern trade counters pan-India, covering all tiers of cities and towns. While the company's manufacturing units are located in Kerala, it has forayed into the Indian ethnic export market with a presence in the US, Canada and UK.

Product portfolio: Sumeru's products in the snacks category are frozen fries, rolls, kebabs and other healthier meals. It has been a pioneer in frozen parathas, which have made the lives of consumers easy and convenient. All products are ready to heat and eat and are processed with the latest IQF (Individual Quick Freezing) technology.

Besides, it has brought more options for consumers with its products like breaded chicken strips, chicken pops, chicken pops – peri peri, cheese infused cheese corn nuggets and chicken cheese nuggets. It also offers a kebab range for both veg and non-veg consumers (veg hara bhara kebab, veg nawabi kebab, chicken seekh kebab and mutton nawabi kebab).

Consumer segments and demographics:

Brand Sumeru is targeting mainly the young mothers and working professionals. It considers each and every household as its TG and offers a range of products for different generations of people in a family. Recently, it has launched momos (both veg and non-veg) globally.

Brand's USP and differentiators:

Innovative Foods Limited is using the most advanced IQF (Individual Quick Freezing) technology to freeze products. One of the biggest advantages that IQF (also known as flash-freezing) offers is

“



Many of our innovations in the snacking range have been one of a kind. Such examples include Sumeru masala French fries where the peri peri comes with the peri peri powder sachet, an add-on for consumers to enjoy the fries better.

– Mithun Appaiah
CEO, Innovative Foods Limited,
Brand Sumeru

that the food items stay separate even after freezing. This is a plus point for the consumers offered by the brand. Simple freezing leads to the formation of large ice crystals in the cells of the product / produce, thereby leading to loss of nutrients, texture and taste. However, IQF technique deactivates enzymes and prevents the formation of large ice crystals in cells of the produce, thereby preserving the taste, texture and nutrients in them.

Sumeru products bring “farm to table” goodness to the consumer's kitchen by ensuring they remain as fresh and nutritious as they were at the time of the first defrost. Its strict quality measures ensure that food is frozen under

highly regulated and quality controlled environment using technique that keeps the packed food fresh and healthy till the time you have it.

Market outlook and opportunities:

Globally, the consumption of frozen foods has risen steadily over the last decade. The frozen food market is expected to reach US\$293.7 billion by 2019, globally, at a CAGR of 3.9 percent. The growth is driven by increasing numbers of modern retail formats, especially in newer economies, where the availability of a greater variety of ready-to-eat meals, pasta, seafood and exotic meats has attracted consumers. However, frozen food category is an INR 800 crore business in the country. For Sumeru, 50%-60% of the product range is the snacking range, which includes both veg and non-veg.

Retailing strategy: The brand's current retail strategy for MT is to have more snacking range options for the consumers. To understand the demands of consumers, it has introduced sampling in the stores. Besides, it conducts several promotions and offers in stores to attract and retain consumers. Trade discounts are also a part of the strategy as well as cross-category promotions, which are carried out as and when needed to create more demand for the brand.

For General Trade, the brand is focusing on product availability and making its products more visible. GT is more successful with powerful execution and visibility of the products.

Future plans and roadmap ahead: Going ahead, Sumeru will keep launching more products in various categories and make available more unique options for the snacking category. The brand's expansion plans includes getting revenues of at least Rs 2.5 billion in the domestic market by 2021.



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Tapping the potential of popped popcorn for health-conscious millennials

➔ **Company and brand profile:** Timla Foods began its journey in 2016 with a simple mission of changing the way people snack by launching its premier brand Popicorn – a ready-to-eat popcorn snack available in six exotic flavors. The company has stuck to the promise of providing snacks that are tasty and better-for-you without compromising on its flavors.

Brand's USP and differentiators:

Popicorn's USP is its taste and longer shelf life. It is non-GMO; gluten-free; low in calories; has no added preservatives; zero trans-fat; full of fiber and has no artificial colors, makes for a 100% natural and wholesome whole grain snack fit for everyone. These are some of the specialities that set the brand aside from other products available in the market.

Consumer segments & demographics:

Popicorn is targeting the millennials as its TG. As millennials constitute a major part of the urban demography in Tier I & Tier II cities of India, the brand has chosen to target millennials all over the country. Millennials also comprise over 34% of India's population, and they have a marked preference for better-for-you snacks. The brand is seeing a huge surge in demand for popcorn as a snack compared to other snacks available in the market. Also, it receives great feedback from the age group of 18-35 years.

Market outlook and opportunity: The overall Indian snacking market is about Rs. 25,000 crore. The snacking market majorly consists of traditional snacks and wafers. Popcorn, as a category in Indian snacking circuit, has a huge potential and Popicorn is tapping on this very factor.

With consumer interest in better-for-you products continuing to grow, the snacks industry has seen a surge in the better-for-you food category in the past couple of years. RTE popcorn in the better-for-you category is still in its infancy stage but is set to grow aggressively in the future.



Also, with the growth in organized retail outlets, better-for-you category snacks have become more accessible. Such packaged better-for-you snacks provide the perfect combination of taste, nutrition and convenience. The company believes that it is the perfect time to capitalize on this trend of better-for-you snacking.

Retailing strategy: Popicorn has penetrated Tier I & II cities and it has a strong presence in Modern Trade outlets in these markets. The brand has ensured its presence in all POS where millennials shop and is available in hypermarkets, convenience stores, corporate, airports, travel zones, and entertainment zones.

Millennials are the most frequent shoppers at MT stores and therefore the brand's key focus has been on all the Modern Trade stores in the country. There is a prominent presence in all A & A+ class GT outlets and strong outreach in B & C class outlets, which together contribute a major share of the brand's revenues.

Popicorn is actively conducting in-store promotions for generating customer awareness. It believes that sales can be accelerated through in-store promotions as the exercise helps to improve consumer awareness about the product as well as educate consumers about the product's benefits. It is also conducting tasting sessions for product experience and feedback as it feels that such experience give the consumers the taste of the product's quality and helps them to make a conscious decision about its attributes.

“



In financial year 2018-19, Popicorn sold around 54 million units with six product flavors, in ten cities, across the country. We popped ~ 1300 tons of corn in the year.

– Prashanth Gowriraju
CEO, Timla Foods Pvt. Ltd.

Future plans and roadmap ahead: The brand's aim is to own the better-for-you category and grow aggressively. In the coming years, it aims to be the market leader with the brand being one of the premier choices under this category. As part of the business continuity plan, the brand wants to tie-up with farmers from different parts of the country to improve its procurement process. It is also planning on increasing its current manufacturing capacity and having additional manufacturing facilities in other parts of the country. The brand is aiming to explore the overseas markets as well in the coming years.

Making snacking guilt-free with better-for-you and great-tasting products

→ Company and brand profile: Too Yumm! brand from Guiltfree Industries is a healthy snacks FMCG brand under the R.P Sanjiv Goenka Group, which was introduced in 2017 with the vision of making bingeing truly guilt-free by offering better-for-you snacks that also taste great. The brand encompasses a spectrum of healthy, packaged western snacks and nibbles across multiple categories, namely Extrudes and Bridges.

Customer segment and product portfolio: Too Yumm! snacks caters to the health-conscious consumers and fitness enthusiasts by providing irresistible, healthy snacking options that are completely baked and not fried. Although every snack consumer is the brand's target audience but its core customers are the consumers between the ages of 16 and 35.

The product range includes fox nuts, veggie sticks, karare, quinoa puffs and multigrain chips.

Brand USP and differentiator: As Too Yumm! snacks are baked and not fried, they typically have 40% less fat as compared to the average fried snacks available in the market. For people who are very careful of the food they consume, Too Yumm! offerings make the perfect binge, as they are very light to consume and make for a wholesome snack.

To add to this healthier snacking proposition, Too Yumm! products come in 25+ lip-smacking flavors, which ensure that consumers don't have to compromise on taste while bingeing on snacks guilt-free. With Too Yumm!'s unique flavors,

consumers don't have to go searching for multiple brands or products to satiate their taste-craving palates. The brand is focused on providing consumers with flavors that they are familiar with.

Market size and opportunity: Consumers are increasingly moving towards consuming healthier foods and are tending to purchase, specifically from a packaged snacks point of view, foods that offer them both health and taste. Also, with changing lifestyles, shortage of time, long format high-engagement content viewing especially on digital, there is an increase in on-the-go consumption as an accompaniment.

As a brand, Too Yumm! is perfectly positioned to tap into emerging consumer preferences for healthier products and meeting their needs for trying out new products that offer a sense of discovery.

Retailing strategy: The Indian Retail Industry is very unique. Indian Retailers respond very well and very quickly to changing and emerging trends. In general, all retailers have a section in their stores for better snacking alternatives.

MT and GT are Too Yumm!'s primary trade channels, even as it has taken off to a great start in e-commerce as well. Thanks to its great team, both the GT and MT channels have been growing at a good pace for Too Yumm! and are contributing well – ahead of industry growth levels.

Future plans and roadmap ahead: Too Yumm!'s endeavor is to capture more and more market share with time. It

“



Too Yumm! has had a good start and has become a major player in the Rs. 16,000 crore western snacks category. It has already garnered an over 2% market share in western snacks and become a Rs. 200+ crore brand within two years of its inception – the fastest to reach this mark.

– Shaswat Goenka
Sector Head - Spencer's Retail Ltd, RP
Sanjiv Goenka Group

believes that the snacks business is a pretty straightforward game to play and dependent on three broad parameters, which it is working on to improve further. Currently, the brand is engaged in strengthening its already strong proposition of 'better-for-you' by offering great products that are genuine and desirable. It has established a robust pan-India distribution infrastructure, which it will keep strengthening and it will keep communicating disruptively on health and taste to accelerate the trend of healthy snacking.



Making on-the-go snacking easier with healthy granola bars

→ Company and brand profile: WIMWI Foods, established in 2014, is involved in the production, processing and preservation of the meat, fish, fruit vegetables, oils and fats. The company was started with the idea of bringing innovative, tasty and healthy foods from across the world in convenient formats and prices to Indian consumers.

Under the brand name ASAP (As Simple As Possible), WIMWI Foods manufactures granola/snack bars. ASAP granola or snack bars was launched in 2016 in three flavors – almond & dark chocolate; fruit & white chocolate; almond, cashew & caramel.

Consumer segments and demographics: ASAP bars are designed for the millennials looking for quick, tasty and healthy snacking on-the-go. The TG of the brand includes young millennials in the age group of 16-30 who are in college; office goers who are frequent travelers and looking for healthier breakfast and 4 pm snacking options.

Mothers are always looking for a healthy snacking option for meeting their kid's hunger pangs and ASAP bars come across as a trustworthy snack that is a healthier option than giving children sugary candy bars and chocolates.

Brand's USP and differentiators: The philosophy behind ASAP bars is to bring in simpler ingredients in the form of healthy bars. ASAP bars are made with high quality ingredients – rolled oats,



“



Snack bars have scope and potential to become even bigger - being a ready to eat snack and a life-style product. Retailers, especially mass retailers, should give sufficient shelf space and educate the in-store sales and merchandising people about the category. I am sure retailers will reap immense benefits out of it.

— Kanupradeep Subramanian
CEO & Director, WIMWI Foods

almonds, cashews and dried fruits. The key market differentiators of the brand are the product's taste, affordable price point (Rs. 30), differentiated packaging, no added preservatives and colors and a shelf life of six months. An innovative see-through packaging gives an edge to the product and allows the customer to know of the ingredients before buying.

Market outlook and opportunity: Snack bars or energy bars is a niche category but has been growing at a rapid pace over the past three years. The company believes that in the next five years, granola bars will be an inevitable part of our snacking options. The market size in India for this category is approximately Rs. 500 crore currently. For the last two years, the market has been growing phenomenally with a year-on-year CAGR of at least 25%.

Snack bars are one of the highest margins category for retailers. So, it is definitely contributing to their overall

sales, and for sure their margins, as brands including ASAP are investing heavily on listing fees and shelf space. The response is good, but definitely retailers have to do more to give justice to the growth and demand of this category.

Often, retailers feel that by giving more space to chips or potato snacks they are increasing their revenue per sq. ft. They mute the demand by allocating less space to this category. By doing this, they are only alienating themselves from the future as snack bars have already become a mainstream product in urban markets. The retailers are also missing the fact that chips and biscuits require more space compared to snack bars, which are dense and less space consuming. So, mass retailers should give sufficient shelf space and educate the in-store sales and merchandising people about the category.

Retailing strategy: Currently, the majority of brand's sales is coming through MT and e-commerce. The reason behind it is that the brand's TG shops from Modern Trade. To widen the brand's reach, ASAP bars has started placing the products in class A & A+ GT outlets as well. Its distributors are working on this approach in Bangalore, Chennai, Pune and Mumbai.

The brand is investing actively in product sampling, in-store promotions, merchandising and visibility to augment sales in MT and GT. ASAP bars has a presence in MT retail chains such as D-Mart (multiple locations), Ratnadeep (Hyderabad), Grace Supermarket, McRenett, Nilgiris (Chennai), and is also available at office pantry networks, among other places.

Future plans and roadmap ahead: Over the next three years, the brand wants to be the top snack bar brand in India. It wants to enhance its brand recognition and sales volumes. But it also faces a tough competition with the larger FMCG companies launching their products in this category. Parle Biscuits has made a strategic investment in WIMWI Foods.



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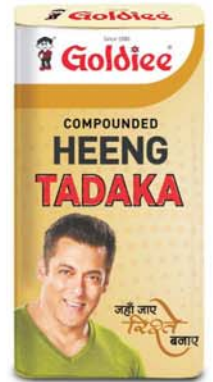
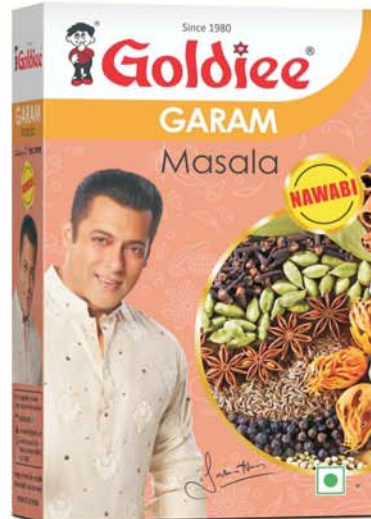
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Establishing a reputation for healthy and gourmea snacks

→ Company and brand profile: Happilo – an ISO & HACCP certified gourmet healthy snack brand from Bangalore – makes many natural and organic products. The brand has been serving its customers with a premium range of gourmet healthy snacking options since 2016. It gives its customers the largest and best collection of nuts and healthy seeds and processes a premium range of dried fruits in its state-of-the-art facilities, which have the capacity of producing 40,000 units per day.

Product portfolio: Happilo’s range of products include nuts, berries, trail mixes, roasted and salted mixes, and dried fruit, apart from a variety of natural and flavored seeds, all of which are tasty and nutritious.

Consumer segments and demographics: All Happilo products cater to consumers from every segment

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Happilo is all about healthy eating. Fried chips have been replaced by salted almonds, roasted pistachios, peri-peri almonds, pumpkin barbeque and roasted party mixes. This brings a healthy option to the consumer, which plays a key role in the assortment planning and basket building for our customer base.

– Vikas Nahar
Founder & CEO,
Happilo International Pvt. Ltd.

and demographic. The brand has been steadily increasing its product range to indulge the taste buds of the millennial generation. It has developed portion packs at the price points of Rs. 25 & 50 to reach newer consumer segments like kids and parents for their mid-day snack craving. Taking the feedback of its customers into consideration, it will soon launch energy and protein bars targeted towards consumers in the 20-50 year age group in Tier I and II cities. Earlier, the company launched its certified organic seeds range – made from basil, chia, flax and quinoa seeds – especially for women and the older generation.

Brand USP and differentiators: Happilo trail mixes are naturally sweet, and the roasted variants are dry roasted with no added oil. The products have zero cholesterol and are natural anti-oxidants. Its organic and flavored range of seeds is cholesterol free, chemical free, and gluten free.

The brand has worked a lot on the packaging front to keep its product tasty and crispy for on-the-go consumption or for storing at home. The products are packed in strict hygienic conditions after proper selection, sorting, processing and cleaning. The company is currently in the process of re-innovating its dried fruit packs in a sleek box design. This, and many more innovations in its current packaging designs are aimed at showcasing its products at competitive rates and meeting the increase in demand from its growing base of consumers.

Retailing strategy: Currently, Happilo products are available across all E-commerce, Modern trade, and A category General Trade stores. The company is active in terms of its strategy for retail markets, both in Modern & General Trade. For Modern Trade, its focus is on higher value packs with proper merchandising, eye level visibility, sampling and end cap placements. For GT, its strategy is on in-store level activations, samplings, FSU placements, and also on educating the consumer about the health benefits of the product. The sales contribution is 30% from Modern Trade and 25% from GT towards the top line.

Future plans and roadmap ahead: Happilo plans to introduce a new range of organic products in the health category like muesli and flavored corn, which have a huge market potential. It already has best-selling flavors – peri peri, barbeque and jalapeno – in nuts and seeds, which it is making available at lower price points to tap into 10,000 new stores across India. The brand is also planning to go for exports to the Middle Eastern countries for its organic and flavored range of seeds.

While Happilo products are widely available across 4,000 stores, the brand’s aim this year is to maintain the healthy growth in all parts of the country. It believes that its products’ competitive price points will help it to gradually enter deeper into the Tier II & III cities of Bharat and be available in more than 50,000 stores.



Bringing value-for-money products for consumers of all classes

→ Company and brand profile: Parle, established in 1929, has grown to become India's leading manufacturer of biscuits and confectionery. Parle symbolizes quality, nutrition and superior taste. An in-depth understanding of the Indian consumer psyche has helped the brand develop a marketing philosophy that reflects the needs of Indian consumers. It is the brand's tradition to deliver both health and taste, with a value-for-money positioning that allows people from all classes and age groups to enjoy the products.

Parle has received some globally recognized certifications (FSSC:22000, ISO:22000 and Halal Certification) and it is a member of the International Association BCMA (USA). Parle has manufacturing units in 7 countries – Cameroon, Nigeria, Ghana, Ethiopia, Kenya, Ivory Coast, Mexico and Nepal.

Parle products are fast gaining acceptance in International markets, across all continents. Its products are available and sold in the major developed world markets like the U.S., UK, Canada, Australia, New Zealand and the Middle East, as part of the brand's efforts to garner a larger share of the global market.

Today, Parle brands have found their way into the hearts and homes of people all over India and abroad. With a reach spanning the remotest villages of India and major cities across the world, the House of Parle has become synonymous with trust, globally.

Product portfolio: The brand has a strong portfolio in snacks comprising namkeens in different flavors, chips, nachos, biscuits, rusk, and confectionery. Its wide range of snacks is available in different flavors and a variety of range – chapar chapar; chatkeens; fultoss; mexitos; and wafers.

Consumer segments and demographics: Parle products are majorly targeting youngsters in the 15-24 age group. Its products have a reach in the B and C category stores in the metros and Tier I, II & III cities of the country. These products come in the price range of Rs. 5- Rs. 10. However, the brand is expanding its TG and demographics and ramping up its presence in Modern Trade. And, with the wide-spread boom in digital, the brand is looking to capture a larger share of the consumers in the MT channel.

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Today, Parle brands have found their way into the hearts and homes of people all over India and abroad. With a reach spanning the remotest villages of India and major cities across the world, the House of Parle has become synonymous with trust, globally.

– Krishnarao S Buddha
Sr. Category Head,
Parle Products Pvt. Ltd.

Market outlook and opportunities: The brand believes that there is an immense potential in snacks segment in the Indian market with a lot of innovations happening in the category, which is the prime driver of its growth. It estimates the market size of the snacks segment it operates in to be about Rs. 24,000 crore and it is looking for a higher level of penetration in the category, which still remains at 60%. It estimates the growth rate of the snacks category at 12-14% and sees this growth momentum continuing for the next five years.

Future plans and roadmap ahead: In the coming years, the brand would like to consolidate the portfolio and strengthen it further. It started with 5 varieties and with chatkeens, mexitos, chapar-chapar and many more it has a strong 15 products in the portfolio. The brand's aim is to make these products visible across the nation in the Modern Trade outlets as well before introducing any more categories and products.



Offering a range of healthy and tasty snacks for all consumer segments

➔ **Company and brand profile:** Mukharochak, since its inception 70 years ago, has become a household name in West Bengal – either as an anytime tasty snack or as a spread for any celebration or parties. Chanachur – the spicy, tangy and crunchy ethnic snack of Bengal – was pioneered by Mukharochak. And for the past four generations, the brand has continued to serve people with their tasty delights and found a presence in almost every home in West Bengal.

Today, the company has a production capacity of about 10 tonnes per day per shift, which cements the brand's position in market as an undisputed leader and a trusted snacks brand. It is now an ISO 9001:2015 & 22000:2005 certified company and produces a variety of mouth watering snacks in its modern hi-tech plant in the most hygienic ways. Mukharochak has also started exporting its products to the U.S.A, Australia, New Zealand, the Maldives and other international markets.

Product portfolio: Over the years, Mukharochak has introduced tiffin snacks, ethnic snacks, tea snacks, and cocktail snacks with the same authority and success. The premium products produced by mukharochak are chanachur, bhujia, aloo bhujia, kabuli chana, moongdal, chira mixture (chira bhaja), diet chiwra, masala muri, chaal bhaja, chowkhas, nimki, salted cashew nuts, dhania cashew nuts, hing jeera cahsew nuts, salted peanuts,

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Mukharochak's ideology and principle is all about offering consistently high quality products. Our focus on health and quality-consciousness allows Mukharochak to offer each pack of its snack with excitingly unique taste and quality.

– Pranab Chandra
Owner, Mukharochak

soanpatri (ghee, elaichi and chocolate), tin-packed rosogolla, and gulab jamun.

Some products like chaal bhaja are even sugar-free. As a result, these products are suitable for aged consumers as well.

Brand's USP and differentiators:

Mukharochak's brand's ideology and principle is all about consistently giving high quality products. The brand does not use any artificial color, chemical or preservatives in its products. For youngsters inclined toward fast foods, the brand has introduced a range of tiffin snacks like chaal bhaja, chira bhaja, diet chira, nimbu mixture and masala muri, which are preservative-free.

For health-conscious consumers, Mukharochak offers products like diet chira and chira bhaja. Besides, it has introduced a wide range of other tasty delights like special papri, sweet & sour, salty and many more.

Market outlook and opportunity: The company believes that there is a huge scope in this category as far as retailers are concerned as the offtake of these products is huge and the R.O.I is also high. In the food and beverages industry, savories and snacks show the highest growth rate of at least 25%.

Ethnic and traditional snacks are the largest category in the Indian savory snacks market. As a result, retailers are allocating more shelf space to this category and the rotation of the product range is significantly increasing day-by-day. However, the production process requires manual intervention in order to maintain the perfect taste and quality of the products. This is the reason why large multinationals have not yet been able to secure such market share in this category.

Retailing strategy: Mukharochak products are available in all retail stores – traditional and modern. The company lays great emphasis on product-wise and outlet-wise penetration in both modern and general trade. It is also focusing on the replenishment process in both the trades. Currently, for Mukharochak, Modern Trade holds a 40% share in the total sales turnover in the company.

Future plans and roadmap ahead: Keeping in mind the immense popularity and demand of Mukharochak products, the company plans to further expand its distribution network across India and beyond. A strong presence in online shopping portals also is an important step towards achieving that goal.

As part of the company's expansion plan, Mukharochak has introduced a new model by setting up its franchise pan-India. The brand's wide range of products will be available at all these franchised outlets.





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A market leader in the wafers and rolls segment

Company and brand profile: Ravi Foods Pvt. Ltd., under the brand name Dukes, is a major player in the baked items and confectionery industry. The brand has its state-of-the-art plants in Hyderabad where it produces a range of products – from biscuits, cookies, wafers to chocolates, candies and confectionery. Consumers love Dukes wafers and rolls, in which it is the segment leader and which has helped the brand grow at a faster pace in the cookies, confectionery and chocolate categories.

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

Consumer segments and demographics: As Dukes has products across several categories, almost everyone is a consumer of the brand. However, the brand is focusing on SEC A1 to SEC B2 consumer segments based on product /pack and value proposition to the consumer. With its wafers, creams, biscuits, chocolates and confectionary, Dukes is serving to kids, mothers, men, women, and the youth.

Brand's USP and differentiators: Duke's philosophy is to delight consumers with the quality of its products. The company is always innovating with its range of products. The brand is always pushing for some path-breaking ideas that have the potential to revolutionize the market. Good-for-health offerings, focus on social media strategies to engage with consumers and being omnipresent are some of the key areas for the brand's consumer connect initiatives.

Dukes has always focused on the production of its entire product range with international quality standards and its products have a presence in 50 countries globally. Keeping up with the demands of the consumers and maintaining the quality of a vast product range is the biggest challenge for any brand, including Dukes.

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

Market outlook and opportunities: The company estimates the market size of the biscuit and snacks category at over Rs. 30,000 crore with per capita consumption in the country expected to grow higher by 2025. Dukes aim is to be among the top five players in the segment.

Currently, the Dukes brand is available in Modern Trade, General Trade, CSD canteens, and also in institutional sales. Its strategy for Modern Trade is to create consumer experience with its packs, product and value proposition. In General Trade, its aim is to reach the consumers through the kirana segment and through its distribution network expansion into Tier III & IV towns with an outlet reach of over a million happy retail partners.

As one of the leading brands with a responsibility to nature and health, Dukes sees the industry changing towards natural ingredients without compromising on taste. It sees the healthy snacks market



We, at Dukes, are exploring opportunities in the baking and value-added biscuits to strengthen our portfolio and create the infrastructure to reach over a million outlets, and to bring the smiles to consumers with tasty snacks.

– Arvind Kumar
CEO, Dukes India

growing with the young population looking towards healthy alternatives and nutrients to stay fit. Consumers today are more aware, read labels and choose the best products based on ingredients that are natural and have health benefits.

Dukes is looking at Tier II & III cities and also at rural economies aspiring and moving towards value-added products from basic biscuits and chocolates. It sees a huge opportunity in these spaces but the challenge is to make these products available to consumers at value prices and maintain raw material costs within control, which are increasing at a fast rate.

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

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Healthy Snacking Registers at Retail

Nutrition, convenience and taste are key.

By Diane Quagliani

There's no question that America is a nation of snackers. One in three consumers (31 percent) say that they always or often snack at least twice a day, and another 39 percent say that they sometimes do so, according to the 2018 Food & Health Survey, from the International Food Information Council Foundation.

The appetite for “healthy” snacks in particular is on the rise. A trends report by Hexa Research projects the U.S. market size for such snacks to rise from \$3.58 billion in 2017 to \$5.3 billion by 2025. The report defined healthy snacks by just five categories, however — cereal and granola bars, nuts and seeds, meat snacks, dried fruit, and trail mix — which means that the market size for healthy snacks is considerably larger after factoring in other popular choices.

Just a few examples are individual servings of cheese, yogurt, yogurt drinks and cottage cheese; vegetable and legume-based chips and crackers; hummus and other dips; nut butter packets; fresh-cut fruits and vegetables; smoothies and fruit cups; and snack boxes with combinations like fruit, cheese and nuts.

Putting Healthy Snacks Front and Center

Factors fueling the demand for healthy snacks — especially among Millennials — are busy lifestyles, the need for convenience and portability, an interest in health and wellness, and the desire for nutrition attributes such as protein, fiber, probiotics and no added sugar. “Clean” ingredient lists, non-GMO, and being free from artificial colors and flavors

are also important. In sourcing such products, however, don't forget the always important attributes of great taste and enjoyment.

To meet the demand for more nutritious snacking, some retailers are swapping out traditional front end power categories like candy and soft drinks for dedicated checkout lanes of health-focused, easy-to-grab choices such as fresh fruits, protein bars, nuts and seeds, trail mix, multigrain chips, and meat



snacks, and adding coolers with plain, sparkling and coconut waters; unsweetened teas; and 100 percent juice boxes.

As one example, West Sacramento, Calif.-based Raley's has implemented better-for-you checkstands throughout its stores. The initiative removed all artificially sweetened sodas from the checkstand cold cases, enlarged offerings such as granola bars and nutrition bars, and improved the quality of certain candy options.

Healthy Snacks Have Their Day

Beyond the front end, retailers can cater to shoppers who consume snack foods at main meals, a growing trend among Millennials and Gen Zs, according to The NPD Group. Fresh fruit and yogurt are popular mealtime choices, but this trend also offers an opportunity to promote portable mini versions of prepared sandwiches, quiche, sushi, pizza and other main-dish items.

Call on your retail dietitian for expertise in promoting the nutrition, ingredient and functional attributes of snacks through social media channels, as well as via in-store events and signage. When planning healthy-snack promotions and media outreach, bear in mind that just about every snack has its day — or month.

Consider fun commemorations such as International Hummus Day (May 13), National Trail Mix Day (Aug. 31), National Bittersweet Chocolate with Almonds Day (Nov. 7), and, of course, National Snack Food Month (February).

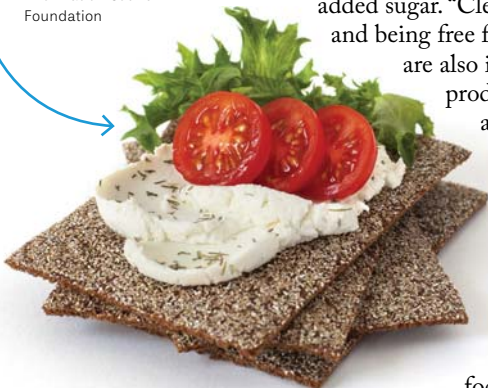
For more ideas throughout the year, check out *Progressive Grocer's* In-Store Events Calendar in every issue. **PG**

Diane Quagliani, MBA, RDN, LDN, specializes in nutrition communications for consumer and health professional audiences. She has assisted national retailers and CPGs with nutrition strategy, web content development, trade show exhibiting, and the creation and implementation of shelf tag programs.



One in three consumers (31 percent) say that they always or often snack twice a day.

Source: 2018 Food & Health Survey, International Food Information Council Foundation





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Just Say It and It's Yours

Brands must embrace contextual commerce across a number of devices to make the sale.

By Abby Kleckler

“
Many people find it easier to navigate the online world and make purchases using their voice rather than typing on a keyboard or clicking around with a mouse.

— Stacy Caprio
Accelerated
Growth Marketing

Consumers no longer want to search for you to make a purchase. They believe your business should be where they are.

From buy buttons to messaging bots and voice assistants to scan-and-bag apps, the grocery industry has been embracing contextual commerce, although there's much more to the technology than the industry has seen so far.

Whether it's referred to as contextual, connected, voice or conversational commerce, the key element is convenience.

“It's about bringing the brand closer to the consumer where they are and where they prefer to be,” says Mariam Reza, VP global enterprise solutions for AI-powered messaging platform LivePerson, based in New York. “It's a conversation between the brand and the consumer, rather than just an interaction or a transaction.”

Voice-Enabled Shopping

An estimated \$40 billion will be spent through voice commerce by 2022, up from \$2 billion in 2017, according to research from global strategy consultancy OC&C.

Walmart, Target and The Kroger Co. all have voice-enabled shopping through Google Assistant, while Amazon-owned Whole Foods Market can connect through consumers' smart appliances and encourage voice-enabled shopping through Alexa, just to name a few grocery adopters.

“Many people find it easier to navigate the online world and make purchases using their voice rather than typing on a keyboard or clicking around with a mouse,” says Stacy Caprio, founder of Chicago-based Accelerated Growth Marketing. “It is much more convenient to speak to navigate the web and make purchases, which I think will be the main reason for voice search and purchases rising in popularity.”

Another large advantage of contextual commerce is immediacy. Consumers don't have time to rethink their purchase, leave it sitting in their digital cart or

abandon it completely when they can't find their credit card or don't want to exert the effort.

Take, for example, restaurant chain TGI Fridays, where customers can place an order through a conversation with a voice assistant and use a stored mobile payment or digital wallet service to complete the transaction. The relationship, however, doesn't stop at a single transaction. TGI Fridays looks at patterns in the way consumers are purchasing and reaches out around the time someone is most likely to order again.

“They're being proactive with what they're learning,” Reza notes. “I get proactively asked if I want to re-order that same order again. Now you won't lose me as a customer if I forget or if another company approaches me.”

This example is a restaurant chain, not a retailer, but the conversion rates speak volumes. TGI Fridays saw a 74 percent lift in orders when it was proactively communicating with consumers in a timely manner specific to each individual customer.

TGI Fridays' innovation and partnership with AI-powered personal assistant bots also allow the brand to communicate to consumers in its own brand voice, using phrases such as the tagline “In Here It's Always Friday,” or personalizing comments about menu items.

Building sticky customers is great for your business, and these features help tremendously. Again, convenience is key, and making the process as simple as possible is what contextual commerce is all about.

“Taking away all friction with one-word voice ordering completely takes away the entire abandoned-cart issue and will be a profitable game-changer for all ecommerce stores who adopt the technology,” asserts Caprio. “Right now, so many ecommerce stores lose sales from people who abandon their items in carts, due to a high-friction checkout process with many steps and points to reconsider the purchase, or simply open a new tab and start doing something else.”



Messaging Bots

According to LivePerson, there are more than 100 billion messages sent every day, with nearly 13 million texts sent every minute. These large numbers show the possibilities for brands to reach people through messaging.

“We tend to do a lot of our interactions day to day over our phones,” Reza says. “If you think about that now in the retail world, that’s where consumers are; that’s where they’re buying.”

“A few years ago we could say that this is something that will change the world and people are going to head toward conversational commerce,” she continues. “Today, what I’m going to tell you is that consumers are already demanding it, and will continue to do so even more.”

Whether through SMS, iMessage, WhatsApp, Facebook Messenger or a number of other messaging apps, brands can communicate with consumers, answer their questions, help them locate a product and complete the transaction.

The success of these messaging bots relies on conversational design, the ability to create an entire shopping experience similar to one that customers can receive in a store with an employee, but instead at their fingertips.

“If you’re going to have automation in the conversation, you’re also going to have humans, and that experience has to be really well designed,” Reza notes. “You must design a full journey and not just part of it. The last thing you want is to give consumers an experience that they’re going to walk away from because it’s just a broken experience.”

Customers need to be able not only to buy, but also to come back and check on the delivery status and inquire about other items, all within the same message.

Social Media

Nearly 60 percent of consumers are engaging in contextual commerce, and 81 percent of these consumers do so through social media, according to research from PYMNTS, in conjunction with Samsung Pay.

On social media, many of these transactions can be done quite simply, providing the same frictionless buying experience as seen with voice-enabled shopping.

“I’ve seen customers start to purchase items through one- or two-click clothing links on social media, which is becoming a great online advertising method,” Caprio says. “I think contextual commerce is a huge opportunity for all sellers with both online and physical stores.”

The image-heavy nature of social media, as well as its continuity across devices, provides advantages for retailers and consumers alike.

Social media sites continue to expand their partnerships with mobile payment options, such as Facebook’s relationship with PayPal, to make the

process smoother and give consumers confidence that the sites are secure.

According to Reza: “Consumers are even more and more concerned about what happens to their information and if it is safe or not, but we’re not seeing people turn away from it because of concerns around the platform. More and more people are buying online through something such as Apple Pay and making convenient payments.”

She’s quick to note that all purchasing through messaging bot conversations, such as those designed by LivePerson, is fully encrypted and highly secure, so any concern should be minimal.

“The best thing we can do is look to China, where this is natural for them: They kind of skipped over the ecommerce part and went straight to conversational commerce,” says Hollie Ellison, senior director of marketing communications at LivePerson. “Over there, 90 percent of a billion users have actually bought something on WeChat [a Chinese multipurpose messaging, social media and mobile payment app].”

“We would expect as this becomes more mainstream, commonplace and expected that we’ll follow suit,” Ellison adds.

Continued Expansion

The connected world is only growing more connected, with the number of what PYMNTS refers to as “Super Connected” users continuing to grow. These users have six or more connected devices, from smartphones and tablets to computers and appliances.

Further, more than 470 million new users are coming onto or using a messaging platform in the next couple of years, according to LivePerson.

As for voice-enabled ecommerce, Amazon and Google lead the pack, but other companies, such as Apple and Samsung, have gotten into the space.

“I would advise brands to adopt this technology as fast as they can right when it comes out,” Caprio says. “This will allow them to get the advantages of first adoption as well as allow them to test and pick the types of contextual commerce that make the most sense for their brand.”

Her message is clear: Brands must meet consumers where they are, on every device, seamlessly integrating ecommerce into their everyday activities. **PG**



The last thing you want is to give consumers an experience that they’re going to walk away from because it’s just a broken experience.

— **Mariam Reza**
LivePerson

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Organic Food
Though still a niche concept, sales are currently at around \$200 million annually and growing 20-40% each year. **Page 14**

Supply Chain
The weak links in supermarket supply chain – ordering, replenishment and delivery – need showing 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 40**

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"OUR FORTE IS GOOD LOCAL KNOWLEDGE OF THE CATCHMENT AND EXCELLENT PRODUCT MIX"
— SURESH MITTAL
OWNER, RAJAMANDIR SUPER MARKET, DELHI

Page 31
FROZEN FOOD
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/heat up products.

HIGHLIGHTS OF THE NEXT THREE ISSUES

AUGUST 2019 DAIRY: Rising income of consumers is encouraging them to trade up to value-added dairy categories such as cheese and yoghurt.

SEPTEMBER 2019 MEATS AND SEAFOOD: More retailers are excited by the opportunity of growth that the market is capable of and the newness that they can offer to consumers. But brands need to differentiate and offer value-added products in a manner that makes the consumer appreciate the value in terms of product's taste, flavor, and convenience.

OCTOBER FESTIVE SEASON SPECIAL: New promotional and marketing offers by brands and retailers to cash in on festive mood, connect with the consumers and grow the business in the months ahead.

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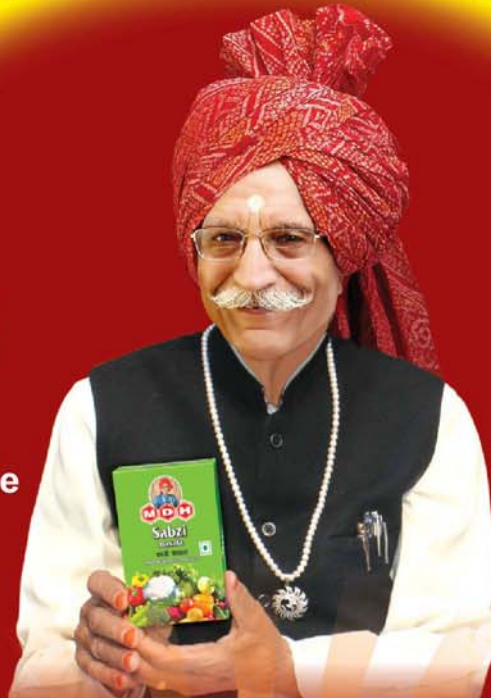
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