

Snacking

Mealtime evolution is fueling the trend toward new kinds of nibbles.

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PROGRESSIVE GROCER

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INDIA EDITION



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On-trend formats, new concepts, fresh ingredient and flavor mash-ups that are redefining the market.

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92 YEARS OF GROCERY EXCELLENCE IN BANGALORE



— KN NIYAS
PARTNER, MK RETAIL



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There are five key issues facing the food retail industry today: emerging new consumerism, artificial intelligence and technology, workforce, the new marketplace, and food production. Our Cover Story – *Unveiled! Breakthroughs in F&B Retail* (pages 38-56) – looks at these issues and how they are prompting the food retail industry to come up with the innovations, changes, and solutions to survive and thrive in today's new retail world.

More numbers of consumers now regularly buy groceries online and they are showing an eagerness to cherry-pick more formats more frequently. According to industry estimates, within 10 years, 20 percent of all food, and 40 percent to 50 percent of all non-food products would be sold online. To survive and thrive in this fast-changing retail landscape, "innovation has to be pervasive in an organization."

The best way for grocery retailers to ride out the retail challenges and drive business innovation is to leverage technology to create a seamless shopping experience for consumers who embrace both the smartphone and the brick-and-mortar store.

However, while adapting to digital retail is important, retailers also need to focus on things that are tactile and emotional. Going ahead, as retailers become more comfortable talking science, technology and nutrition, they should also have the ability to adapt, adopt and evolve, which will prepare them for the next golden era of retail.



Amitabh Taneja
Editor-in-Chief

All feedback welcome at editorpgindia@imagesgroup.in

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COVER STORY

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KN Niyas
Partner, MK Retail

92 YEARS OF GROCERY RETAILING EXCELLENCE IN BANGALORE

KN Niyas, Partner, and a third generation member of the family that founded the MK Retail Company, which has held its own as a pioneering F&G retailer meeting the expectations and aspirations of generations of consumers over decades by providing quality, affordability and assortment in a modern supermarket setting.

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Unveiled!
Breakthroughs in F&G Retail



Food Retail these days is an amazing industry with new markets and constant changes, resulting in new requirements and needs. New products – the lifeblood of retailing – are infusing verve into existing lines, creating completely new categories and filling unmet needs not previously on consumers' – or retailers' – radar.

The changes being witnessed in product development tell a remarkable story of innovation rooted in a compelling value proposition.

58 PROFILES

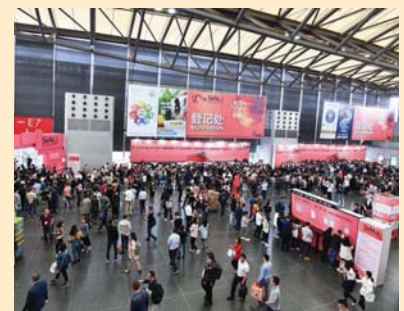
Companies that are delivering a new value proposition to the market through their on-trend formats, new concepts, fresh ingredient and flavor mash-ups.



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Market Update

SIAL China – Asia's largest food innovation exhibition sets new records this year

SIAL China 2019, co-hosted by China Commerce Development Centre (CCDC) and COMEXPOSIUM, was successfully held in Shanghai from May 14-16 at the Shanghai New International Expo Centre. The leading food marketplace in Asia, SIAL China occupied the full 199,500 square metre exhibition centre to facilitate 4,300 exhibitors from 70 countries and regions, and 117,595 professional visitors. The Expo featured 21 product sectors, which included meat, dairy, wine & spirits, beverage, sweets & snacks, grocery products, condiments, seafood, frozen food, ready meals, agrifood, fruits & vegetables, canned & preserved food, beer, health food, organic, among others. The four dedicated product zones were taken up by categories like beverage, meat, wine, and dairy. The top 10 pavilions by floor space were occupied by countries like China, Russia, Brazil, USA, Korea, Argentina, Spain, Turkey, Australia, and Germany.

The crown jewel event at the Expo was SIAL Innovation, which celebrated food and beverage innovation and was open to all registered visitors and exhibitors. This year, SIAL China received 697 products submission from exhibitors, of which 184 submissions were

shortlisted and reviewed by the 2019 SIAL Innovation Jury. The Jury selected 10 finalists based on the following criteria: health, packaging, and consumer convenience. This year's finalists came from China, France, Poland, South Korea, Switzerland, Thailand, Turkey, and the USA, with each product addressing recent developments in the food and beverage industry. Gemice Sea Salt Avocado Ice Cream was awarded the Gold Award for their indulgent and healthy recipe. Soligrano earned the Silver Award for their Vege Spelt Burger with pepper and linseed, while Foodistry Co. Ltd captured the Bronze Award for their innovative Real Porridge.

The 12th edition of La Cuisine made Hall N4 a must-visit for food lovers and casual observers as it played host to the 2019 China International Top Chef Invitational Competition co-hosted by SIAL China and the World Association of Chef Societies. Eight National and Regional teams from Italy, Japan, Malaysia, Anhui Province, Beijing, Hong Kong, Shanghai, and Shenzhen competed in the two-day competition.

Chen Gang, certificated judge by WACs and member of Famous Chefs Committee of the China Cuisine Association oversaw the event, which judged the teams' dishes on their creativity, presentation, uniqueness, and taste. In the end, the team from Shenzhen took home the championship.

The Wine Innovation Forum was a 3-day event that brought top local wine experts and international speakers together to offer world-class seminars. This year, Master of Wine David Forer and Master of Wine Roderick Smith led seminars on day one and two of the forum, while experts from the China National Wine (Cider) Technical Committee and Tetra Pak China discussed Experiential Marketing and Cultural Promotion in the Chinese wine market and Innovative Wine Packaging on Day 3.

The Best Buy China Competition delivered an effective platform for SIAL China 2019 wine exhibitors to showcase their star products. This competition honored wines and spirits that represented the best value to professional buyers and consumers.

The Retail & Hospitality Forum once again emerged as one of the best places in SIAL China to look deeper into different sectors and trends. This year forum offered a full calendar of talks by industry experts on a range of topics, including the Bubble Tea Industry Overview and Beyond by Euromonitor, Succeeding in Chinese E-commerce by Sovereign, Trends in Food Product Innovation by XTC World Innovation, and Food Business Opportunities in the China E-commerce Market.

At SIAL China 2019, the 7th edition of 'Seafood Fest' in partnership with China Aquatic Products Processing and Marketing Alliance (CAPPMA) explored the "Right Seafood, Right Wine" theme during a series of cooking demonstrations. Another highlight was the 8th Chocolate World, which was kicked off by the official mascot Mr. Chocolate, and a DIY session was opened to the audience, giving them a hands-on chocolate making experience to remember.

The SIAL China Match-Making System made up an important part of the exhibition's commitment to internationality and innovation. In 2019, improved system convenience and affordability, helped 998 exhibitors and 7,197 visitors make 17,251 meeting reservations.



Bigbasket's big push for sustainable and environment-friendly practices

Bigbasket, India's largest online supermarket, is undertaking several environment-friendly initiatives, both in its supply chain as well as the warehouses. The company's scale and push for sustainable and renewable energy has resulted in tangible savings and positive contribution towards the environment. Apart from powering many of its units with solar energy, bigbasket has also moved to using recycled paper for printing of invoices.

Bigbasket first integrated solar power generation went into operations in 2016 and currently uses it in 7 of its distribution centres, namely Bangalore (3), Gurugram, Chennai, Telangana, and Andhra Pradesh. The company has witnessed a marked reduction in its carbon footprint through this. It also uses electric vehicles for its delivery logistics in places like Delhi/NCR. In addition, the ability to make invoices from recycled paper will be expanded to all its delivery locations across India.

Speaking about this initiative, Cdr (Retd.) V.S. Ramesh, Co-founder and Chief Projects Officer, Bigbasket, said, "At bigbasket, the processes are always directed at curbing the carbon footprint and reducing any negative impact on the environment to the extent possible. We are in the process of transitioning to a zero-plastic use. All our grocery products are shipped in re-usable and sturdy plastic crates, which have a shelf life of more than 2 years. Once a crate's lifespan is over, it gets recycled. Our environment-friendly initiatives are not only limited to green packaging practices but also focus strongly on reducing power consumption to bring down the carbon footprint."

According to **Brahmaprakash Lakshmipati, Head of Projects, New Facilities, Bigbasket**, "Some of our other environment-friendly measures include undertaking rainwater harvesting. The rainwater is collected in sumps with a capacity of about 20,000



to 25,000 litres and this water is used for washrooms, cafeteria, cleaning, etc. Solar power is another important aspect of our environment-friendly initiatives. We have already completed the installation of 1.6 MW capacity of rooftop solar and others are in different stages of completion. At the Bangalore facility, the per-unit cost of power has come down to INR 4.5."

Bigbasket has also fully transitioned to a 'no plastic' policy for packing fruits and vegetables and they are now delivered in paper and corrugated cardboard boxes, which can be recycled.

METRO Cash & Carry partners with ePayLater to digitize kiranas with 'Digital Shop' app

METRO Cash & Carry, India's leading organized wholesaler, has formed an exclusive partnership with fintech start-up ePayLater to digitize and transform kiranas with a more affordable and sustainable solution. As part of its next phase of kirana digitization program, METRO in association with ePayLater has co-created a mobile application – 'Digital Shop' – that enables kirana owners to use their existing smartphones to digitize their business operation instantly without any additional investment on a device.

'Digital Shop' by ePayLater and METRO will digitally empower small retailers and kiranas by upgrading their traditional methodologies and leverage the power of technology by modernizing their business. By downloading this app, kiranas can digitally track their daily and monthly sales; manage their inventory; place orders with METRO, and offer digital payment options to customers using their smartphone. The 'Digital Shop' offers kiranas zero transaction fee; a universal QR code to accept payments

from all apps; and no cap on daily and monthly transactions. In addition, kiranas can extend credit to their customers using the 'Digital Shop' app and also get access to interest-free business credit with a few clicks on the app. This would help kirana free up working capital, thereby making business more profitable.

The app will also provide analytics to kirana owners, which will show inventory consumption patterns and the fast and slow-moving products. It will

help optimize the kiranas' product mix and help in improving their revenues and margins. The kiranas will be able to engage with customers digitally and help them create customized offers, provide loyal customers with an instant credit of up to Rs. 25,000 for purchases, and grow their revenue by offering additional services like utility and bill payments, amongst others.

Commenting on the strategic alliance, **Arvind Mediratta, MD & CEO, METRO Cash & Carry India**, said, "Through the Digital Shop app, we aim to transform the traditional kiranas into omni-channel stores. Whether it's easy credit solution for business; a complete digital experience; data analytics to grow business; or a competitively priced product portfolio offering; we bring it all together in a single app at no extra cost."

To become part of Digital Shop, kiranas and traders can download the app from Google Play or click on the link https://play.google.com/store/apps/details?id=in.epaylater.android.retailer.upi&hl=en_IN&showAllReviews=false



IKEA looks at multi-channel growth ahead after completing one year of operations

IKEA, the world's leading multi-channel home furnishings retailer has completed a year of successful operations in India. When IKEA opened doors of its first store in India to the Hyderabad in August last year, more than 40,000 visitors flocked to the store on the first day of the opening. Speaking on its first-year milestone, **Peter Betzel, CEO, IKEA India, said,** "It is very special that we have completed a year of retail operations successfully in India. Thank you to all our co-workers, customers and partners who have helped us build a strong foundation. India is a long-term commitment for IKEA, and we will focus on fast expansion with a multichannel approach. In the coming years, our goal is to meet 100 million customers with our beautiful and affordable home furnishings' offer. Our next destination is Mumbai where we will soon start our e-commerce journey, followed by Hyderabad and Pune going online."

For IKEA India, it has been a year of learnings and connecting with new customers everyday. It has also been a journey of discovering IKEA for the customers and how IKEA helps them realize their dream of a beautiful home that combines quality,

functionality, sustainability and form at affordable prices. Apart from its best selling product categories like beds & mattresses, bathroom fixtures, decoration and dining products, food continues to be everyone's favorite. The numbers speak for themselves. In the past year, the IKEA store in Hyderabad has served 1 million frozen yoghurt; 1 million veggie balls; and 2 million chicken balls. More than 350,000 people have signed up for IKEA family membership.

The Hyderabad store is managed by a family of diverse 820 co-workers, 41 per cent of whom are women. 18 different languages are spoken at the store. IKEA is highly focused on sustainability. Some of the sustainability measures that were taken during the last year at the store include installation of 1973 solar panels on the store's rooftop. Closing the loop on food waste from the store is a big focus; a bio-digester has been installed at the store to that end. About 80 per cent of this waste is recycled or incinerated for energy recovery under the 'waste to livelihood' project in a nearby community. From these community farms, IKEA is sourcing fresh produce for the restaurant and it recycles the water used in the store.



Peter Betzel,
CEO, IKEA India

Yoku Moku introduces its festive collection eggless cookies

Yoku Moku, the Japanese confectionery brand, is celebrating two years of its operations in India by launching its first ever range of egg-less cookies. Especially crafted for the Indian market, DCB (egg-less) cocoa cookies come with white chocolate filling inside whereas DBL (egg-less) butter vanilla cookies have milk chocolate inside. The delectable cookies come in lovely pastel colored packing, which makes them ideal for gifting this festive season. Each box of egg-less cookies have 26 cookies inside – 13 of each flavour – and is priced at Rs. 2405.

The confectionery brand owes its unique significance to the Swedish town Jokkmokk where the founder Noriichi Fujinawa first tasted European butter cookies. With over 40 years of experience, Yoku Moku is now one of the leading confectionary brands in Japan and has expanded worldwide. The founder of the brand, Noritaka Fujinawa, was passionate about creating unique confectionery and it took him years to perfect the ingredients and recipe. The result was a delectable butter cookie that melts in your mouth. The philosophy of the brand is "making confectionery is a creation, not a production".

Since the Indian market is very sensitive about egg in confectionery, Yoku Moku has specifically crafted the cookies without egg, exclusively for the Indian market. It took almost two years for the brand to come out with an eggless version that matches up to the taste and quality of its existing products. After many test productions and sampling, the new variation of cookies was finally launched. "India has been one of the fastest growing markets for the brand and the past two years have been remarkable. Customer satisfaction is a key driving force and we aim to keep exceeding expectations. Keeping in mind the culture and the upcoming festive season of India, Yoku Moku is introducing eggless cookies, which is now a perfect gifting option," said **Naoko Wada, Manager-International Business, Yoku Moku.**

The brand also offers a wide range of products with attractive packaging and cookie assortments that make for perfect gifting options for all your near and dear ones.



NatureFresh Professional engages with bakers at the Baker Business Expo 2019, Hyderabad

NatureFresh Professional, the bakery shortenings and margarine brand from Cargill's oils business in India, engaged with customers and bakers through various baking sessions at the recently held Bakery Business Expo 2019 in Hyderabad. The kiosk at the Hitex Exhibition Center was based on European Cafe theme, at stall no. 141 to 143, at the Expo held from July 10th to 12th. The set up caught maximum eyeball of all visitors, throughout the duration of the Expo. To make the kiosk more intriguing, the brand organized various baking sessions for the visitors each day, ranging from identifying a premium bakery fat, choosing the right flour for bakery products to baking premium exotic bakery cookies. Apart from the insightful bakery sessions, there was a wide range of healthy, trending, commercially viable recipes and Danish recipes at the stall for customers to experience.

Famous bakers like MRA Bakery, Kerala, Karachi Bakery, Hyderabad & Pista House, Hyderabad visited the stall and appreciated the recipes displayed. Also, customers were enticed by the taste of the baked products, all made using NatureFresh Professional Lite. The brand witnessed continuous enquiries about NatureFresh Professional Lite, available in 1 kg. For the first time ever, the brand invited the popular bakers of Hyderabad over for dinner, to engage with them after the Expo. This interactive dinner helped the brand



to understand their requirements and interests, providing them with complete technical solutions, aimed at helping their business reach newer heights.

Speaking on the occasion, **Subin Sivan, Marketing Head, Cargill's Oils business in India**, said: "NatureFresh Professional is an important brand in Cargill's portfolio catering for bakers across the country. Baker Business Expo 2019 works as an ideal platform for us to engage with customers and various bakers while sharing knowledge about the new trends in the baking industry. As a brand, we look forward to such platforms for direct customer engagement and knowledge sharing."

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Fourth batch of bakers graduate from Puratos Sanskaar Foundation

Graduating Day ceremony of the fourth batch of bakers from Puratos Sanskaar Foundation School, a bakery school, run as a Corporate Social Responsibility initiative by Puratos India, was held in Navi Mumbai on August 1st, 2019. This year 21 students from diverse backgrounds received their certification in Bakery, Patisserie, and Chocolate. During the intensive two-year study program, students learn the art of baking simple breads to complex finished applications. Each of these graduating students has been provided a platform for opportunities within the industry in India.

Peter Deriemaeker, Markets Director – Asia Pacific/ Middle East/ Africa, Puratos, said: “People Care is one of the important initiatives at Puratos. The Puratos Sanskaar Foundation School is a reflection of this value in our pursuit to enable a

comfortable future for the skilled children coming from underprivileged families.” Ashish Seth, Managing Director India and Area Director South Asia, Puratos Food Ingredients India Pvt. Ltd., said, “Given India’s growing love of Bakery, Patisserie &

Chocolate items, there can’t be a better time than now to enrich the talent pool in the industry by providing fully trained professionals.”

Puratos is determined to provide enriching opportunities to young and keen students from underprivileged backgrounds. The school has an equal opportunity policy for boys and girls and students are recruited irrespective of social background. The foundation offers them a means to learn from best-in-class faculty members and be meaningfully employed with quality employers within the industry.



Wagh Bakri Tea Group launches new packing for its Instant Tea range

As a part of its centenary celebrations, Wagh Bakri Tea Group has introduced new packaging for its instant tea range in four exciting flavours – Masala, Elaichi, Ginger, Lemongrass. The range is also available in ‘no added sugar’ variant for the health-conscious consumer. For those who prefer their coffee on-the-go, an ‘instant-coffee’ product has also been launched. The packaging has been designed after extensive research on global packaging trends and consumer insights.

Parag Desai, Executive Director, Wagh Bakri Tea Group, says, “Indians carry their culture wherever they are travelling. The Instant Tea Pack comes handy and satisfies the urge of drinking a cup of homelike tea. The product, with its mix of tea, sugar and milk serves Wagh Bakri Tea’s homelike experience even when one is far away.”

Wagh Bakri Instant Tea is modern travel essential for the ones who never compromise on their cup of tea. Just pour the premix in a cup, add hot water and your tea is ready.

The new packaging comes in a contemporary look and a new tamper-proof lock, which ensures genuine product and safe delivery to the end consumer. All flavors are available in a pack priced at Rs.140 containing 10 instant tea premix sachets. The new and exciting range is available at all leading stores and online purchase can be made on www.buytea.com or www.amazon.in



Nilgiris introduces its Filter Coffee Decoction for brewing authentic kaapi

South India’s loved brand Nilgiris has introduced ‘Filter Coffee Decoction’, made with the finest coffee beans, which are evenly roasted and ground for a nice strong cup of kaapi. With the new Filter Coffee Decoction by Nilgiris, anybody can make a cup of warm coffee every morning in just three easy steps. All one must do is pour the decoction into a cup, add hot milk and sugar to taste and rejoice the authentic south Indian filter coffee.

Nilgiris Filter Coffee Decoction has a 80:20 ratio of coffee beans and roots of chicory plant, which gives it a nice rich flavour. The coffee comes in a 150 ml pack and can make up to 8-10 cups filter coffee. Nilgiris Filter Coffee Decoction has no added preservatives, color or artificial flavors.

Speaking about the launch of Filter Coffee Decoction, Nikunj Biyani, Business Head, Nilgiris, said: “At Future Consumer, through our brands we want to offer a perfect recipe for our fast-moving consumers. The filter coffee of south India has a cultural identity of its own and is consumed by every south Indian household. With the launch of the Filter Coffee Decoction, consumers can opt for an easier way of making an authentic filter coffee and enjoy every sip anytime, anywhere.” Nilgiris Filter Coffee Decoction is priced at Rs. 80 and can be purchased from the nearest Big Bazaar, HyperCity and Nilgiris stores.



Akiva Superfoods showcauses Delhi's longest peanut butter sandwich at Select CITYWALK

Akiva Superfoods recently marked the launch of its peanut butter range by hosting an event at Delhi's Select CITYWALK where it helped lovers of peanut butter collect to create a multi-layered 12 feet long peanut butter sandwich, the longest Delhi has ever seen! The aim was to highlight the power of this super tasty and super healthy snack, with a good show as well. The evening was full of activities around peanut butter, ranging from a fun trivia quiz, facts on this yummy spread and a chance to taste the new launches from Akiva Superfoods. The brand also collaborated with Feeding India who later took a hundred and fifty pieces from this very large sandwich and shared it amongst a bunch of kids.

Commenting on the launch of the new peanut butter range, Shalabh Gupta, Founder and CEO, Akiva Superfoods, said: "Peanut Butter is a universally loved product across the

globe as well as in India and we are very excited to introduce it with unique variants. We were keen to showcase the product in a manner that matched its uniqueness, and the challenge to create something Delhi has never seen, along with a good cause was a wonderful way to engage with our consumers. We are glad to have the support of Select CITYWALK to partner with us for hosting this unique initiative. Our range of Peanut Butters delivers on the brand promise of creating something wholesome, healthy yet indulgent and tasty, and that's exactly what this activity is also about.'

The peanut butter range is available in 500 ml pack in three flavors – Crunchy, Matcha and Dark Chocolate – and priced Rs. 289, Rs. 499 and Rs. 349 respectively. The product is nutritionally dense, irresistible in taste and can be used in sweet and savory dishes alike. One can layer it between



slices of multigrain bread, use as a dip with fresh fruits or add to your smoothie and satay – the possibilities for recipes are extensive. What's more, there are no sneaky additives like food coloring or hydrogenated oils or added sugars, to take away from its natural, wholesome goodness.

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Mindful Munching

The evolution of mealtime is fueling the trend toward new kinds of nibbles.

By Lynn Petrak

Snacks used to be fillers bridging three square meals a day. As traditional sit-down meals have given way to splintered eating at different times and locations, however, snacking is becoming a bona fide occasion on its own.

Snacking is no longer all about sitting down with a bag of chips or a dish of ice cream — that still happens, of course, but more consumers are eating on the go and choosing smaller portions, mini meals, and packaged or prepared snacks for convenient consumption and satisfaction.

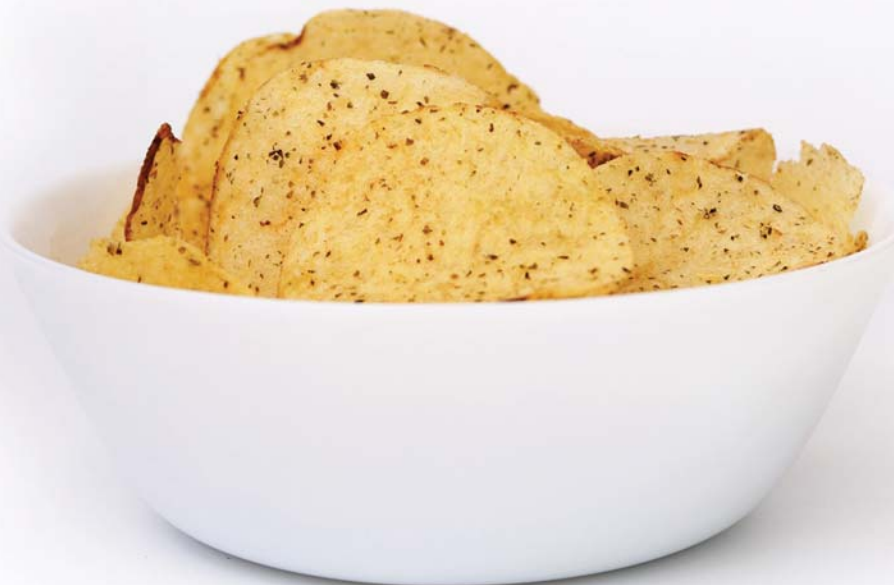
“There’s been a definite shift toward more mindful snacking,” affirms Jim Low, EVP of sales and marketing for Schuman Cheese, in Fairfield, N.J. “Snacks are less of an impulse when consumers feel hungry, and instead, over time, they have moved toward purposeful snacking with higher-quality, more nutritious products. Snacking is now a more valuable food purchase.”

Snack manufacturers have rolled with these changes. “Rather than perceiving snacking to simply be a way to squelch hunger between meals, instead it is an intentional way to graze,” observes Mark Singleton, VP of sales and marketing for the Southern Recipe Small Batch line from Lima, Ohio-based Rudolph Foods.

Consumer studies confirm the frequency of snack purchases and consumption. According to research from Chicago-based Datassential, consumers report eating up to four to five snacks a day. Another study, from Chicago-based Mintel, found that high-frequency snackers who indulge three to four times a day described themselves as “too busy” to eat a full meal.

Key Takeaways

- ▶ More consumers are eating on the go and choosing smaller portions, mini meals, and packaged or prepared snacks for convenient consumption. This trend has led to an increase in snacking on items that provide a nutritional benefit of some kind, prompting manufacturers to create and market more of these better-for-you products.
- ▶ As Millennials and Gen Z consumers are particularly interested in foodservice/prepared food offerings, retailers should target these shoppers when promoting snacks in that area of the store.
- ▶ Eating trends are boosting online snack sales: Internet sales of snacks have surged 173.5 percent around the world, Euromonitor reports.





Given the demographics of frequent and heavy snackers, this shift is likely permanent. According to The NPD Group, based in Port Washington, N.Y., snacking accounts for more than a third (35 percent) of all eating occasions in the United States, and younger consumers are leading the demand. What Millennials have started, Gen Z will expand, as NPD also found that this younger demographic — born roughly between 1995 and 2015 — is driving a significant part of the snack market.

Another consumer study, conducted for Stonyfield Farm Inc., of Londonderry, N.H., found that 75 percent of parents have a child who eats up to three snacks a day. “Eating is a lot more flexible today,” says Stonyfield Brand Director Natalie Levine. “It has to be — parents have work commitments and children have after-school activities, not to mention packed weekend schedules, and families are adjusting to make things work on the move. This often means grabbing a couple of portable items out of the fridge and pantry that may have previously been considered just a snack, but now parents are combining them for heartier mini meals that can sustain everyone throughout the long day.”

Snacking Around the Store

If the lines between dayparts and between retail and foodservice have blurred, the lines between what makes a great snack and what makes a satisfactory mini meal or meal replacement are also a little fuzzy, which opens up new opportunities for grocers to boost incremental sales.

Beth Bloom, associate director of food and drink for Mintel, highlights the impact of that redefinition of snacking. “The strong demand for snacks has resulted in increased competition and an expanded view of what constitutes a snack, which can challenge traditional snack categories,” Bloom noted in a March 2019 report on salty snacks from the market research firm.

Grocers are delivering more innovative solutions to shoppers who snack and are also seeking more food value.

In the frozen food section, for example, appetizers and smaller-portion meals meet this kind of need. Many of these items also align with interest in globally inspired flavors and plant-based ingredients.

The fresh perimeter is another space to spotlight snacks as meal solutions. “This shift toward the snacking lifestyle certainly speaks to opportunity beyond packaged snacks for grocery,” says Sharon Olson, president of Chicago-based

research company Y-Pulse, which has studied young consumers’ eating habits for the past 12 years. “Fresh has a powerful appeal to young consumers and their parents, and supermarkets score well when it comes to fresh perceptions.”

Olson cites an example: “Freshly prepared bento-style snack boxes that are prepared on site at supermarkets appeal to kids in a big way. They can be eaten at once, over time or saved for later — readily available on demand, but no commitment required on when to consume them.”

The dairy section, with a plethora of high-protein products that pair well with other foods, is also a high-potential area. “The snacking trend puts us in a real sweet spot,” notes Schuman’s Low. “The ‘real food’ quality of cheese makes it a great snack that consumers can feel great about enjoying. The more purposeful approach to snacking means consumers are looking for premium snack options.”

One example he offers is Schuman’s Cello Copper Kettle Chisels, made with Copper Kettle cheese and packaged in an ergonomic cup.

In the center store, traditional packaged snacks can fit into this new kind of eating and can be merchandised as such. Plant-based snacks are one example, as are nutrition bars.

Salty snacks are also getting a makeover in product, packaging and promotions to grab the attention of snackers seeking greater sustenance in a convenient form. For instance, the Crunchmaster brand, from Loves Park, Ill.-based TH Foods Inc., recently underwent a repositioning, with new graphics and supporting campaigns. “In the last two years, we have launched more than 20 new products to meet the new, emerging demands of consumers,” says Kim Holman, marketing director. “Several of these launches are snack crackers.”

Within packaged snacks, there are some notable trend drivers,



The strong demand for snacks has resulted in increased competition and an expanded view of what constitutes a snack, which can challenge traditional snack categories.

— Beth Bloom
Mintel





Snacking honestly is a good way of adding nutrients to your body without sacrificing delicious flavors and textures.

such as an ongoing demand for healthy snacks. “Crackers will become more functional,” predicts Holman. “Look for collagen, protein, fiber and other functional ingredients continuing to make their way into snack crackers.”

At Southern Recipe Small Batch, pork rinds are getting an update based on consumers’ lifestyle and nutrition interests. “No longer are pork rinds considered ‘junk food’ by many of our shoppers, but rather a high-protein, low-carb and gluten-free way to cure the craving for a snack, with a flavorful crunch,” asserts Singleton, who points to other features like lower sodium, no artificial colors or MSG, and the use of cleaner ingredients.

Others agree that snacks perceived as better-for-you are fueling consumers to eat snacks throughout the day and in place of some traditional meals. “Today, snacking honestly is a good way of adding nutrients to your body without sacrificing delicious flavors and textures, becoming a win-win for everyone,” says Kevin Joseph, VP of marketing for Thinsters and ParmCrisps, part of Fairfield, N.J.-based That’s How We Roll.



ParmCrisps also fit into other eating plans, like the pizza variety that helps consumers following gluten-free and keto diets who can’t or don’t eat pizza, adds Joseph.

Healthy packaged snacks appeal to health- and wellness-minded consumers of all ages, from Baby Boomers, to Millennials and Gen Z, to even the youngest crop of snack eaters who will form the future market. In a recent survey of kids ages 5 to 11 and their parents, Stonyfield found that snacks are the easiest occasion for them to agree on.

According to Levine, the company is providing solutions for busy families with items like new snack packs that combine organic low-fat yogurt and either organic cookies, pretzels or graham crackers, and new whole-milk yogurt pouches featuring real fruit and veggies.

Paths of Success

Healthy snacks coexist with other types of snacks that can be positioned for all-day consumption. A recent Nielsen study, for example, projects some growth for healthy snacks, but even greater growth for indulgent snacks available in small sizes.

As they showcase snack products to shoppers, either in traditional sections of the store or in special grab-and-go or snack displays, grocers can tie into snack manufacturers’ own promotions. For instance, Lehi Valley Trading Co., based in Mesa, Ariz., recently launched a campaign, the Snack Outdoors Challenge, to encourage the consumption of its items, including trail mixes, granolas, popcorn, dried fruit, nuts and seeds, when on the go in a nontraditional outdoor eating moment.

Offering items that fall under the snack umbrella is also an approach for the foodservice or prepared food area. Many products fit into this segment within foodservice at retail, including offerings like appetizers, handhelds, salads, protein bowls, sushi and smoothies/nutrition drinks, to name just a few.

Promoting these offerings to younger shoppers can be especially effective. “More than half of young consumers say the supermarket restaurant is among their favorite [sections of the store],” says Y-Pulse’s Olson. “Their overall favorite venues are home and restaurants, and this provides some insight for supermarkets. When supermarkets are developing offerings to appeal to young consumers, they have to be competitively desirable to restaurant offerings.”

This notable change in eating has led to new paths of success for online snack sales, too, especially since snacks combined to make a meal, or eaten instead of a traditional meal, aren’t daypart-driven and are often suitable for ecommerce purchases and delivery. In fact, according to a recently released report on snacking from London-based Euromonitor International, internet sales of snacks have surged 173.5 percent around the world. **PG**

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food market

Kwality gears up for its next phase of retail growth after 20 eventful years

Progressive Grocer tracks down the eventful milestones in the brand's corporate trajectory.

“
We are on a continuous research to ensure that we provide our consumers with cereals that are best in quality.

— Naresh Pagariya
MD, Pagariya Food Products Pvt. Ltd

“
Pagariya operates across four channels – GT, MT, E-commerce, and Exports; and army canteens all over India.

— Dheeraj Jain
Director, Pagariya Food Products Pvt. Ltd

Bangalore-based Pagariya Food Products Private Limited, which operates the Kwality brand, is a leading manufacturer, importer, exporter and supplier of a wide variety of breakfast cereals, masala, spice powders, instant powders, soup powders, among other products. Drawing on the health and nutrition plank, the Kwality brand today has a wide range of more than 60+ products in 150+ different pack sizes to cater to the health and convenience needs of all age groups, especially housewives, children and consumers on-the-go.

The Kwality brand began with its founder Bhawarlalji Pagariya who opened a small provisions store in the old Bangalore area where he had come to from a small town in Rajasthan to earn a livelihood. He ran this shop for 30+ years until his children grew up and came of age. His son Naresh Pagariya, who is now MD, Pagariya Food Products Pvt. Ltd. felt that manufacturing could be a better business bet and he started on his new entrepreneurial path by making four masalas from the family's provision store. In 1998, he moved his manufacturing business to a new 300 square foot location at Bangalore's Magadi Road.

Slowly, he kept adding products and within one year he had added 8 products to his masala range. With time, the products were selling not only in Bangalore but also in the nearby towns like Tumkur, Ananthpur, and others. The business grew fast and within a year, the unit moved to a five times bigger space in Rajajinagar.

It was around this time that one of the cereal brands launched their breakfast cereal. Naresh felt

that if this product could be better packaged and at an affordable price, then Indian consumers would have a better choice. This led to launch of Kwality breakfast in 2002, and it became an instant hit in the market. Over the next two years, Pagariya Food Products added almost 20 more products to its growing portfolio of masalas, instant mixes, cereals and other categories. Some of these products like Gobi Manchurian Mix & Noodles masala were the first-of-its-kind to be introduced by any brand in the Indian market, and apart from their novelty factor the products were very well received in the market.

“We take great pains in procuring the best quality raw materials from the source. Our products are manufactured with state-of-the-art technology and are un-touched by humans during the production process. The products are made from all natural ingredients and have no added colors or artificial flavors. We are on a continuous process of research to ensure that we provide our consumers with cereals that are high in nutrients, minerals, and other benefits, which they are currently deprived of due to the hybrid varieties of foods,” says Naresh.

When his nephew Dheeraj Jain, Director, Pagariya Food Products, joined the business in 2002, the company, besides launching new and novel products, began focusing its marketing thrust on expanding to all regions of south India. From 2006 to 2012, the brand's focus was on expanding the retail network all across the south Indian market, and it kept on adding to its distribution & retail network. From 2012-to 2018, it started focusing more on Modern Trade, and today it has a presence across the entire Modern Trade channel.

“Our company operates across four channels – General Trade, Modern Trade, E-commerce and Exports; these apart, we also supply to CSD (army canteens) all over India. In General Trade, the company has over 450 distributors across south India and west India with over 35,000 domestic retailers. Kwality products are sold to over 20+ countries and are available in 5000+ International outlets. They are also available at International chains such as Carrefour, Walmart, Giant, Coops, etc,” says Dheeraj.

The company is focusing on metros, Tier I and Tier II cities as it key markets as well as the rural markets and other niche markets for its lower value packs and will continue coming up with more healthy and nutritional products at affordable price points in the future. **PG**





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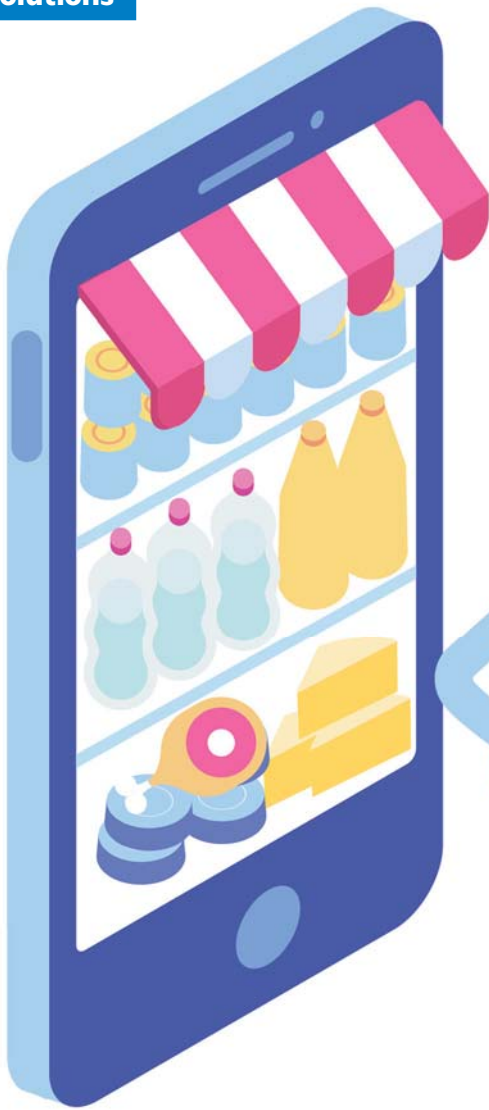


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Independent Initiative

Smaller players are investing in big solutions to boost the shopper experience — and the bottom line.

By **Randy Hofbauer**
and **Bridget Goldschmidt**

Gone are the days when local supermarket operators could just depend on their stellar reputations in their respective communities to keep customers coming back.

In an increasingly competitive landscape, more targeted engagement is necessary, especially for smaller independents lacking the deep pockets of their larger rivals, and that may require digital assistance.

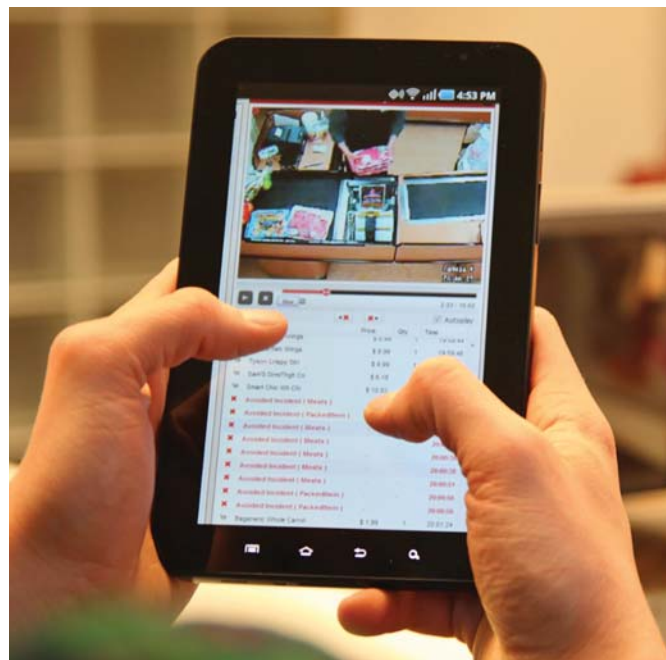
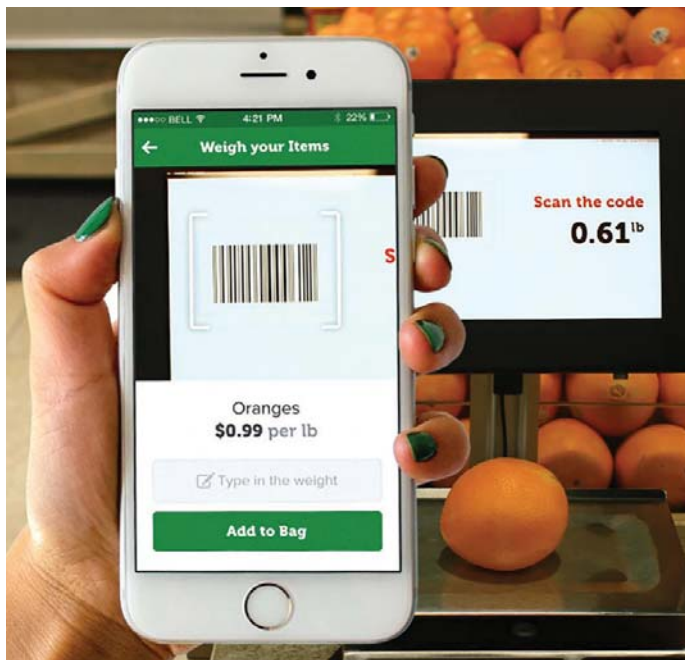
Just ask Foodtown Stores, part of the Iselin, N.J.-based independent supermarket cooperative Allegiance Retail Services, which in April named New York-based Constellation Agency as its first digital agency of record.

“Digital channels have an expanding role in today’s meal planning and grocery shopping,” noted Allegiance Retail Services Chief Marketing Officer Donna Zambo when the news came out. “Recognizing this, we are partnering with Constellation Agency to ensure that Allegiance and Foodtown are able to meet these needs now and into the future.”

Asked to elaborate on the types of strategies envisioned by the co-op, a Constellation spokeswoman spoke of “hyper-local content in support of Allegiance members. Each member has

Key Takeaways

- ▶ Smaller independent grocers are adopting innovative technology to better compete against deep-pocketed major industry players.
- ▶ Solutions implemented span the areas of food safety, product attributes, point of sale, mobile checkout and theft/accidental scan avoidance.
- ▶ Independent grocers have already seen success with such solutions, in terms of an enhanced shopper experience and savings.



unique and differentiating stories and go-to-market strategies — we want to enable them to tell these stories. Digital and social media is a great forum for this.”

Beyond stronger digital engagement, independents across the United States have been adopting a wide range of forward-looking technology to enable them to hold their own against the big guys.

Playing it Safe

For instance, last November, Festival Foods, one of Wisconsin’s largest independent grocery chains, with 32 locations, implemented new technology chain-wide to provide real-time access to temperature and food safety data at the product level.

Beginning with a pilot with Minnetonka, Minn.-based Internet of Things services provider Digi International, De Pere, Wis.-based Festival adopted SmartSense by Digi for task management and continuous temperature across all of its locations. The technology provides a subscription-based service that continuously monitors task management activities and the temperature of perishable goods wirelessly.

The 30-day test included real-time, product-level monitoring in all refrigeration units, food-temperature monitoring in deli sections, and automated task management. In addition to helping guarantee food safety, the combination of continuous, accurate temperature readings and automated record-keeping saves thousands of dollars and employee hours per year by reducing shrinkage and manual tasks.

In the technology’s second year, Festival anticipates a 300 percent return on its annual investment.

“SmartSense is a proactive approach to equipment maintenance and food safety that gives us the operational oversight we need to improve our bottom line and serve our guests better than ever,” says Hsing-Yi Hsieh, Festival Foods’ director of food protection and regulatory affairs. “Now every store has real-time access to temperature and food safety data at the product level, and we’re able to get ahead of any potential issues well before they become a reality.”

Know Your Products

Also in the Badger State, Fitchburg-based Certco Inc., which services more than 200 independent grocery stores throughout Wisconsin, Illinois, Minnesota and Iowa, in September 2018 adopted innovative grocery technology to help ensure that product attributes are best represented to its retailer network.

In partnership with Chicago-based ItemMaster a cloud-based product content platform company, the grocery wholesaler and distributor asked its manufacturer suppliers also to team with the platform to build a repository of core product information, including product images.

This commitment ensures that “Certco and its entire ecosystem of retailers and vendors have accurate and robust product content, which we know drives more sales,” notes David Ryman, the company’s VP of sales and marketing.

“Consumers want to shop the way they want for their tastes, lifestyles and nutritional needs,” explained ItemMaster CEO Dev Ganesan when Certco implemented the technology. “The requirement from the consumers drives an evolution in what product information brands, wholesalers



Our adoption of the company’s premium point-of-sale technology has already proven successful by enabling faster, more frictionless transactions for both our associates and customers.

— John Lauderbach
CIO, Roche Bros.





Fairway Market's mobile self-scanning checkout solution enables customers to skip the line for the cash register.

and retailers provide. Certco can now look forward to a streamlined workflow with retailers, by delivering complete and comprehensive product attributes, which will drive best-in-class shopper experience both online and in store.”

Seamless POS

Meanwhile, Wellesley, Mass.-based Roche Bros., which operates 20 independent grocery stores under the Roche Bros., Sudbury Farms and Brothers Marketplace banners, modernized its supermarkets earlier this year by implementing point-of-sale (POS) systems that improve speed and efficiency at the front end.

The retailer teamed with Durham, N.C.-based Toshiba Global Commerce Solutions to adopt the latter's TCx 300 POS systems, which produce faster, seamless transactions. The technology offers intuitive, responsive touchscreens to enhance associates' ability to provide a more satisfying shopping experience.

“Our adoption of the company's premium point-of-sale technology has already proven successful by enabling faster, more frictionless transactions for both our associates and customers,” Roche Bros. CIO John Lauderbach observed in January, at the time of the grocer's initial installation of the first 100 of the systems and their accompanying TCx displays in seven stores, followed by the deployment of 200 additional lanes throughout the remainder of Roche Bros.' locations.

Check Out by App

When Fairway Market launched mobile self-scanning checkout in its 15 stores in New York, New Jersey and Connecticut last November, it reportedly became the first grocer with such an option in the region.

Partnering with New York-based FutureProof Retail to introduce the technology, the grocer allows shoppers to use the Fairway-branded mobile checkout app to scan products via their phone cameras. Weighted items — such as produce and products from the olive bar or hot bar — can be weighed at digital scales.



To check out, customers scan a QR code that shows up after they've scanned all of the products they wish to purchase. They then walk out, skipping the line for the cash register altogether.

According to Mike Penner, director of retail applications and technology at the New York-based grocer, the move “continues Fairway's tradition of offering the best food for our customers in the way that's most convenient to them. The response from mobile shoppers has been incredibly positive.”

Putting a Stop to Theft

Finally, for anyone who may doubt the big impact that the right solution can have on one small operator, Hawaiian retailer Down to Earth Organic & Natural has reported a deterrence of 3,000 theft and accidental scan-avoidance incidents in the past year alone at its six independent grocery stores on Maui and Oahu through the adoption of new technology.

The Honolulu-based indie saw its bottom line take a hit due to food theft, including cashiers “sweethearting” products — i.e., pretending to scan merchandise but deliberately bypassing the scanner. In response, Down to Earth installed StopLift's checkout vision systems two years ago to monitor cameras over the checkout area, letting the system's AI video analytics software analyze security video to detect theft and improve operational efficiency at all checkouts.

As of February 2019, StopLift's ScanItAll had detected about 3,000 incidents of theft and accidental scan avoidance over the past year — 316 in one month alone. It even singled out four cashiers in the act of stealing, which led to their termination under the grocer's zero-tolerance policy.

“It's a viable deterrent from stealing,” says General Manager Clifford Hillier. “The cashiers know they're being watched, and they're careful. We show them the video incident of them giving an item away, and it doesn't happen again.”

StopLift's Scan-It-All system determines what occurs during each transaction at the supermarket checkout to immediately distinguish between legitimate and fraudulent behavior. As soon as a scan-avoidance incident occurs, Cambridge, Mass.-based StopLift, which constantly monitors 100 percent of the security video, flags the transaction as suspicious. It then quickly reports the incident, identifying the cashier and the date and time of the theft.

Hillier doesn't want to install self-checkouts, because he believes that they detract from customer service. Further, with Hawaii's unemployment rate the lowest in the United States, he wants to protect cashiers' jobs, which, in his opinion, self-checkouts would erode.

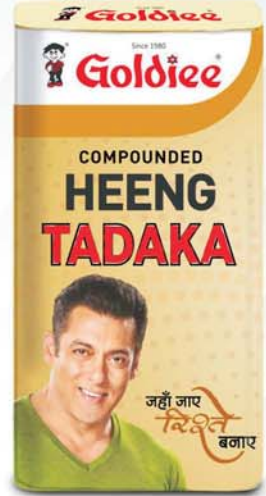
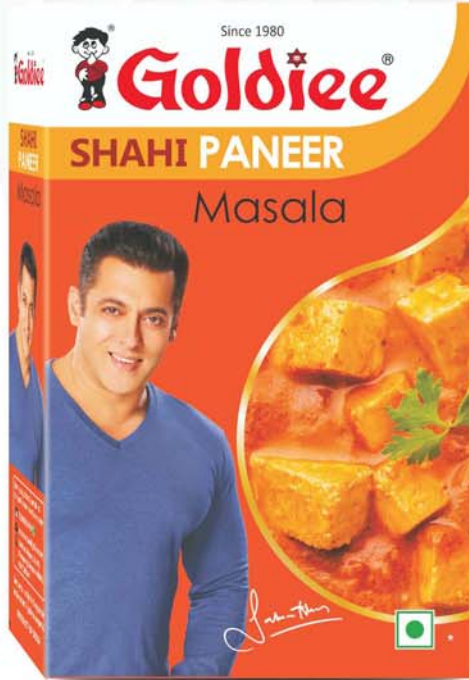
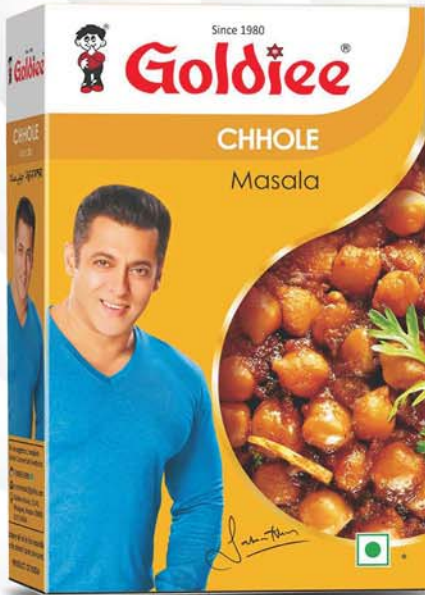
“No one is watching the overhead cameras,” he adds, “so there's no point in having them without StopLift monitoring the video.” **PG**



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KN Niyas
Partner, MK Retail

92 Years of Grocery Retailing Excellence in Bangalore

Progressive Grocer spoke to **KN Niyas**, Partner, and a third generation member of the family that founded the **MK Retail Company**, which has held its own as a pioneering F&G retailer meeting the expectations and aspirations of generations of consumers over decades by providing quality, affordability and assortment in a modern supermarket setting.



FACT BOX: MK RETAIL AT A GLANCE

Name of the retailer: **MK.Retail Company**

Launch of first store: **1927**

City/ies where stores are in operation: **Bangalore**

Number of stores in operation currently: **8**

Total retail trading area: **74,500sq.ft.**

Store size: **4,000-25,000 sq.ft.**

Product categories & merchandise: **FMCG Food; FMCG Non-food; Consumer Durables; Fruit & Veg; Fish & Meat;**

SKUs per store: **60,000**

Percentage of shelf space to major product categories: **FMCG Food 50%; FMCG Non-food 30%; Fruits & Veg 10%; Fish & Meat 10%;**

Sales contribution from PLs: **30%**

Sales growth over the past 5 years: **25% per annum**

Average monthly sales: **Rs. 13 crore**

Sales growth y-o-y: **10%**

Average bill size: **Rs. 800**

Catchment and customer profile: **Upper class and upper middle class**

Daily footfalls: **Approx. 5,000 across all stores**

Number of Employees: **550**

Give us an overview of the history of your store over the years; the eventful milestones in its development and a sketch of its progression till date.

MK Retail has a legacy of over 90 years. Started in 1927 by M.K. Ahmed, the scion of a prominent retail business family, the store, back then, was called MK Ahmed & Sons. It was a novel concept then, and soon, thanks to its location – the central business district of Bangalore – the store shot to fame. The founder, with his visionary zeal, customer-centric approach and towering entrepreneurial spirit, turned MK Ahmed & Sons into the most favorite neighborhood convenient store in Bangalore.

People started to walk into the store from across Bangalore and found MK Ahmed & Sons a one-stop-shop for all their retail requirements. This propelled the visionary founder to branch out to other locations and make the products and services available to one and all. Soon afterwards, M. K. Ahmed passed the mantle to his sons and they started taking the business further.

The 1980s has been a crucial decade for MK Ahmed & Sons. The explosion in consumer products increased the choice of the customer. Subsequently, the taste of the customers underwent a substantial change. With the expectations of modern conveniences reached a new peak, the market was ripe for a supermarket format, especially in the up-market suburbs. Sensing the opportunity

fast, Abdul Rahman, son of M. K. Ahmed, started MK Ahmed Trading Company in April 1981 in Indiranagar. He introduced the modern shopping experience of self-service coupled with personalized attention. This became enormously successful and resulted in widening the customer reach and increasing trade loyalty.

After a while, the retail chain store underwent yet another transition. This time, the name changed to its present version – MK Retail. Today, the chain of stores is spread across the length and breadth of Bangalore, and is one of the most successful and reputed supermarkets in the city.

At present, MK Retail is a family managed business and has redesigned and improvised the self-service supermarket format to meet the ever-changing demands of the customer. Despite increasing competition among supermarkets and the emergence of online retail stores, the business has grown exponentially and has spread across convenient locations to make retail shopping truly a “customer’s delight”.

Currently, we operate 8 stores in Bangalore spanning 74,500 sq.ft. of retail trading area and stocking over 60,000 SKUs across a range of F&G product categories – Fruits & Vegetables; Fresh Fish, Meat & Poultry; Grocery & Staples; Beverages; Frozen Foods; Bread, Dairy & Eggs; Branded Foods; Personal Care & Health; Household General Merchandise; Kitchen & Dining; Home & Living; Toys & Stationery. Each

M K Retail is a family managed business and has redesigned and improvised the self-service supermarket format to meet the ever-changing demands of the customer.





It's our understanding of the local needs in food and non-food consumer durables that makes it possible. In each of our stores, we have 60,000 SKUs.



one of our 8 stores is individually profitable and sustainable on a stand-alone basis.

What is the major customer and value proposition of MK Retail?

As the pioneers in retail supermarket, we strive to be ahead of our customers' expectations all the time. Delighting a customer day in day out is not an easy job. But we never take them for granted. We continuously tread the extra mile to make sure that each customer who comes to us leaves the store happy. Towards this goal, we have a two-pronged approach: 1) procure only the very best – be it vegetables, pulses, stationery items; 2) adhere to the dictum, 'customer is the king'.

By offering product assortment across price ranges from premium to economy, we remain inclusive. It's our understanding of the local needs in food and non-food consumer durables that makes it possible. In each of our stores, we have 60,000 SKUs. Adding to this is our promise of quality. From fresh fruits and vegetables to meat and sea food, we procure them from the source. Naturally, we pass on the benefits to our customers by selling these at best daily prices.

Besides these, we conduct regular promotional activities at our stores to offer value shopping for the customers. With our omnichannel presence, social media activities, quick home delivery and hassle-free services, we remain the preferred choice of customers across age and income groups.



INITIATIVES FOR RAMPING UP RETAILING PERFORMANCE

Over the years, MK Retail has taken up and implemented a number initiatives and measures in various areas to enhance its operations and retailing performance. Some of these include:

Effective Technology Adoption: In a world where technology reigns supreme, MK Retail has been leveraging the powers of technology to make its business smoother. It has invested significantly in establishing IT systems right on time. With integrated processes in place along with automation, it has been able to ensure a seamless consumer experience. At the core of its technology adoption is our customer. Moreover, by introducing online shopping, WhatsApp orders and phone orders, it has made day-to-day shopping at MK Retail a pleasant experience for customers.

Supply Chain Management: Undoubtedly, the most important part of successfully running a retail business is to have an effective supply chain management system in place. MK Retail operates through a central warehouse, which has stringent quality check procedures. Its logistic team has its own fleet of vehicles to service the stores on time at regular intervals and to ensure a healthy fill-rate.

Human Resources: Employees are the soul of any organization. With well-trained and well-looked after employees an organization can scale the heights of success, the surefire way. MK Retail conducts personality development programs for its employees and announces periodical appraisal for them. It also has employee recognition programs and distributes the best employee award at each of its store. In addition to these measures, it provides various personal benefits for its employees and offers them what they covet most – the space and opportunity to grow.

Marketing & Promotions: Keeping in mind, the importance of marketing and promotions, MK Retail regularly uses an array of medium to advertise its stores. It regularly comes up with newspaper ads, newspaper inserts, radio spots, SMS campaigns, special deals and offers for its loyalty members, apart from conducting door-to-door promotional activities as well as exclusive promotions in apartment complexes.

Customer Service: Customers are at the centre of everything that retailers do for the simple reason that their very existence relies entirely on customers. MK Retail has an exclusive team of customer care executives to address the grievances of its customers. On the other hand, it has outsourced its home delivery to a professional logistics company, which has been delighting customers with on-time delivery every time with service-level agreement (SLA).



How is your retail store different from other supermarkets in Bangalore?

The very first thing that differentiates us from others is our desire to stand out and carry our legacy forward. We stock up an assortment of gourmet products as well as regular fast moving consumer goods (FMCG). In addition to this, our stock keeping unit (SKU) helps us to track the inventory regularly and replenish the stock well in advance and way before an item goes out of stock. With well-stocked racks, friendly and courteous staff, our inimitable customer service and the customer loyalty we enjoy, we are far ahead of our competitors.

What is the location strategy for your stores?

We check various aspects before we choose a location for our store. The first and foremost parameter is how easily accessible the location is to prospective customers. We target high-spend catchment areas with high visibility.

What is your strategy for merchandise display and category management to make it consumer-centric? Which newer foods and ingredients at your stores are emerging and breaking out?

Of course, merchandise display has a prominent role to play in the retail business and we are quite aware of it. Our strategy is to keep premium stock keeping units (SKUs) that generate better ticket size at eye level. Since there's increased awareness about organic and natural products, it's easy to promote them. This is the same with health and wellness products as well.

Which are your best-selling or the more celebratory product categories?

Our best-selling category is packaged foods & grocery. Currently, 52% of our total revenue is generated from this segment. The category



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- ▶ Wide range of regular promotions providing value shopping
- ▶ Omni-channel presence
- ▶ Online & social media
- ▶ Quick home deliveries and hassle-free service

comprises groceries, staples, processed foods, snacks, beverages and confectionery products. In a city like Bangalore, where customer have options in plenty, we are immensely proud to state that we are a household name, well-known for the quality of our groceries and staples.

Are you doing anything to especially attract the young generation – Millennial and Gen Z shopper?

Yes, indeed. It is impossible to ignore this high-disposable income segment. At the same time, one has to up the ante in order to attract the Gen Z shoppers. The first and foremost thing that comes to mind when talking about the young shoppers is how busy they are. Being compulsive multi-taskers with a high-paced lifestyle, they are always preoccupied with something or the other. It's for this reason, we offer online services. This way, they can get the best of products with just a few clicks!

In addition to this, we've been doing various exercises to cater to the young generation's tastes and preferences over the years. Adding new product

portfolios such as energy bars, energy drinks and various personal care products, which are not available in a traditional supermarket, have been one of them.

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

Recently, as part of our 90th anniversary celebrations, we had partnered with Hindustan Unilever Limited (HUL). It was a runaway success. In fact, there was a whopping 30% increase in sales during the promo period.

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

We have private labels that are extremely popular. The sales from private label food and grocery account for 25% of the total revenue. Since private labels are our USP, we go the extra mile to make sure that our products are the best in the market.

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

Our top-selling private labels belong to the grocery and personal care segment. Over the years, we have been introducing new products (private labels) and building unique product portfolios. This has helped us in building customer loyalty and trust. We are expanding our private label segment by adding innovative products to the category at regular intervals and interacting with our customers to understand what they want exactly.

Have you carried out any innovations at your store, which you would like to highlight?

With the proliferation of gadgets, e-waste has become a mounting problem. We are the first store in south India to keep e-bins for our customers to dispose their e-waste. We also count our Loyalty Program to be an innovation and our best achievement because over 70% of our sales are generated from our loyalty card members, whose base keeps growing by the day.



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→ CATERING TO THE CATCHMENT

What is unique about MK Retail stores is their personal touch with customers, and their quick acceptance and adaptation to customer needs and market trends. Besides its fresh produce, good quality and seasonal fruits, vegetables and flowers, wide range of Indian mithaais, gourmet foods, high-quality bakery products and desserts, a good range of crockery and other household products and variety of gifts for all budgets, MK Retail has built up a reputation of catering to the needs of the local catchment. For instance, it offers Kerala delicacies to

meet the needs of residents from Kerala in the catchment area. And quite unlike the national players whose sales and purchases are pan-India and who are given to sourcing the same product for their stores across the country, MK Retail stores are able to vary the product mix for its customers based on the catchment profile and location. Another example is how it stocks all the paraphernalia needed for Durga Puja at its Indiranagar store during the festival season. Indiranagar has a huge Bengali population and its 20,000sq.ft. store there becomes a one-stop

destination for the Bengalis during the Puja.

Quick and friendly service, the right product mix and affordable pricing enables a good retail experience that keeps customers coming back. "We believe that a truly progressive grocer is one who is capable of meeting the requirements of his customers and by ensuring how localized his product assortments are. Not only do we excel on these retailing parameters, we have been providing our customers best quality products at value-for-money prices in all our stores across the city," says Niyas.

He adds: "As grocers, we continue to be one of the most well known, trusted and successful local retailers in Bangalore. With our continued excellence in retail, we have gone from strength to strength to provide our customers with the best quality merchandise at value for money prices in all our stores. Ranging from household products and top quality groceries, MK Retail is striving to meet the dynamic needs of the customers as a one stop destination that offers you all the essentials with the promise of affordability, accessibility and a joyful shopping experience."



What are the salient features of your customer loyalty and reward program?

Loyalty goes a long way. We can vouch for it from our experience and our Loyalty Programme has truly been a path-breaking initiative. As I said over 70% of our sales are from the loyalty members and our loyalty customer base is growing steadily by the day. We engage with our customers online and are active on social media. Hence, we are able to tell our customers just about everything – ranging from the new entrants on our racks to promotional activities. Our online shopping platform is very popular with our customers and we can safely say that it is our best achievement so far.

In terms of features, our loyalty program offers several advantages and rewards to customers. To

enhance their shopping experience further, we have launched Advantage Rewards Program, wherein all our customers get to stay updated with news about your favorite brands, latest events across our stores, as well as new product launches & special offers! With our rewards program, every customer earns points with every shopping they do at MK Retail. The program has been designed to especially make it beneficial for all our customers to shop with us and get rewarded with gift vouchers, discounts, and avail our special offers.

How and in which ways have you been using and leveraging technology to enhance your operations and service level?

When it comes to technology, we have invested significantly in establishing IT systems and integrated processes to enable automation and ensure a seamless consumer experience. Our technology back-up and support takes good care of the back-end management and other operations such as warehousing, stock inventory, ensuring fill rates, and timely supply and distribution to all our stores. We operate through our Central Warehouse equipped with quality check procedures and we have our logistics fleet to service the stores on time at regular intervals and ensure a healthy fill rate. We also have a business intelligence tool for forecasting and placing orders.

What are your plans and targets for the future?

Bangalore is growing rapidly. We are looking at the possibilities to expand our footprint in newly developed residential localities. **PG**

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Distribution Redefined



How online meat delivery is changing the retailing model in India

The online meat selling start-ups have changed the way India buys meat. These firms sell custom cut, marinated and ready-to-cook meat products and are a boon for people sitting at home and wanting to enjoy a non-vegetarian meal without the hassle of cutting and cleaning.

By **Deepanshu Manchanda**

According to industry research, the size of India's meat market is close to \$30-35 billion, which is further growing at around 18-20% every year. This implies that over 70% of the population in India eats meat. Over the last few years, the start-up ecosystem has brought a trend shift in the meat selling industry and has occupied a fair share of the meat delivery market. However, the meat delivery market in India is still dominated by the unorganised meat sellers who control almost 99% of the space. So far, consumers have trusted the local butcher shops for buying meat and have been compromising with quality and convenience. Most of them are still not cognizant of the fact that the meat bought from butcher shops is sold in an unhygienic manner and the products are not fresh and lack quality. The

meat sold at traditional butcher shops is openly displayed and is also vulnerable to pollutants and insects or flies.

In the traditional meat selling market, there is no standardization of price, quality and freshness. The unorganised players follow an inefficient supply chain, which further degrades the quality of the products and makes it unhealthy for consumption. According to experts, the meat sold in India has the highest level of antibiotics. The investment in both meat industry and livestock for meat purpose breeding is low. Inadequate infrastructure is another major concern area.

Over the last couple of years, urban consumers have slowly moved towards online meat buying on account of various factors such as convenience and receiving fresh and hygienic meat at their doorstep. The online meat selling start-ups have changed the






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In the traditional meat selling market, there is no standardization of price, quality and freshness.

way India buys meat. These firms sell custom cut, marinated and ready-to-cook meat products and are a boon for people sitting at home and wanting to enjoy a non-vegetarian meal without the hassle of cutting and cleaning.

The startups are using a technology integrated platform to solve the problem of good quality and fresh meat availability. Customers can now enjoy fresh, marinated, ready to cook, nutritious non-vegetarian food options at the click of a button.

The online players are supplying certified quality meat to consumers. They have standardized the price of products to a large extent and are trying to establish a level playing field in the meat selling industry.

Online start-ups maintain the freshness of the meat through cold storage and other such processes. They work directly with farmers and are standardizing the processes at the farm level too.



The start-ups are also working with slaughters to ensure that they follow scientific and hygienic slaughtering methods for quality meat production. They are also working with government bodies like National Meat and Poultry Processing Board (NMPPB) and are setting standards and guidelines to provide safe and hygienic meat products to the end consumers.

The online meat selling market is setting up more modern and practical ways of meat processing and supply chain management processes. For cold storage systems of meat products, standardized mechanisms for storage and transportation are being set in place. Startups are taking aggressive efforts in setting up a supply chain system which benefits the meat industry and the end-consumers.

Meat delivery start-ups are also following excellent packaging standards to ensure that the products' shelf life increases by leaps and bounds. Vacuum pack, canning, shrink packaging, foam trays packing etc. are few packaging techniques that are extensively being used in the modern day meat industry scenario.

They are also addressing the concern of providing hygienic slaughter facilities for clean meat production and marketing. Start-ups are establishing a standard hygienic transport facility with hygienically maintained closed containers, which further helps in transporting meat for dressing and selling for consumption.

To conclude, I would like to iterate that there is huge potential in online meat selling market. The industry is completely encouraged by the response of customers where the customer repeat rate is above 90%. With the kind of year-on-year growth that the online meat sellers are witnessing, they will surely make a huge contribution to the economic development of the country in the long run. **PG**



The author is Co-Founder and CEO, ZappFresh, India's first and only fully-integrated fresh meat brand, which is currently present in eight cities across India – Delhi, Gurgaon, Noida, Faridabad, Ghaziabad, Chandigarh, Mohali and Panchkula.

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Change or Die

Grocers of all sizes need to rethink their business strategy to meet the needs of today's consumer.

By Kat Martin

Fixate less on customer service and more on hospitality by treating customers as your guests.

The grocery landscape is rapidly changing, and while it might not quite be do or die, it is definitely time to change.

“Learning a new idea is easy, but forgetting how you used to do business is hard,” said Kevin Kelley, co-founder of Los Angeles-based design firm Shook Kelley. “But in grocery, if we don’t change, we die,” Kelley noted during his presentation at this spring’s Western Michigan University Food Marketing Conference, in Grand Rapids, Mich.

Early in his architectural career, Kelley became interested in how space can affect people — the smallest changes in lighting or furniture placement had a big impact on how people “felt” in a space. This would greatly influence how he began to work with grocers in developing the space where customers shopped. “The idea of place is starting to change,” he said. “How do we change our ‘place’ to still bring people together? We have to change our value proposition of place.” This also means grocery has to change its relationship with customers.

It’s no secret that many people find the process of grocery shopping a tiresome one, and the advent of technology and online ordering has lifted some of that burden, but physical stores still have a place. The stores simply have to make the payoff of coming into the store greater than the work of buying groceries.

Kelley noted that buying and shopping are two radically different ideas, and that grocers need to move away from the buying mentality. “If retailers are fixated on the buying, they’re not going to survive,” he added. “They have to shift to shopping, which is an experience. People go where it is a sensory delight.”

Buying is intent-driven and transaction-focused, while shopping is more unplanned and leisure-focused. Buying gets reduced down to a commodity, while shopping is ideal for differentiation. Buying is typically about solving immediate needs, and

shopping is more about exploring ideas on how to live a better life.

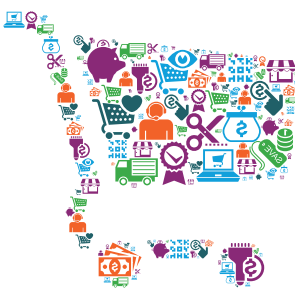
“You have to help people imagine how their life will be improved by shopping your store,” Kelley said. The center of civilization has always been going to the market, which should give joy and delight, something the internet can’t really replicate. For grocers to continue to succeed, they need to rethink their business model and format.

Shook Kelley worked with Niemann Foods Inc. on its new concept, Harvest Market, which will soon open a second store. (Progressive Grocer featured the first Harvest Market, in Champaign, Ill., in its March 2017 issue.) When working with Rich Niemann Jr., co-owner of Niemann Foods, Kelley wanted to find out what he was passionate about, something he does for all of his clients. “Find your soul, find what you care about, and you’ll find an audience that cares about it, too,” Kelley explained.

For Niemann, who also owns a ranch that supplies beef to Harvest Market, that passion was about the family farmer. That was the genesis of the Harvest Market concept, which highlights the farm-to-table concept throughout the store. The in-store eatery is even called Farmhouse Restaurant, and the store’s website showcases all of the farmers who supply the store. The location even features an in-house butter-churning facility to really highlight the made-in-house commitment.

Kelley also worked with Canadian grocer Freson Bros. on its new concept, which features the tagline “Alberta Grown, Alberta Owned.” What was important to the owners, members of the Lovsin family, was their heritage as butchers, and in creating a new store concept, the Lovsins also created a new brand for their meat, Real Alberta Meat. The family has opened two stores under the new concept, and a third is on the way.

“You don’t need many hooks to tell a story,” Kelley said. “Young and old care about craft.” **PG**



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Breakthroughs in F&G Retail

Food Retail these days is an amazing industry with new markets and constant changes, resulting in new requirements and needs. New products – the lifeblood of retailing – are infusing verve into existing lines, creating completely new categories and filling unmet needs not previously on consumers’ – or retailers’ – radar.

The changes being witnessed in product development tell a remarkable story of innovation rooted in a compelling value proposition. However, the harsh reality is that thousands of products launches collapse within the first year for any number of reasons. Hence, nailing innovation at just the right moment remains the trickiest and, arguably, the most essential, of all ingredients.

By **Sanjay Kumar**

There’s no denying the importance of innovation and the role it plays in piquing consumers’ interest and getting them excited to buy, regardless of the shopping channel or medium. However, before moving further on the topic of innovation, it is important to understand what it means to consumers, what sectors and brands are considered innovative, and what role innovation serves as a purchase motivator.

Innovation is translating consumer wants and needs into products that deliver on promise. You need a deep understanding of consumer attitudes and behaviors as well as the market trends. A product that creates consumer passion certainly inspires people to talk about it, and that’s really an indication of success. The third is clearly “speed to market” and getting ahead of the competition. Whenever you have a good idea, competitors are going to have similar ideas. A lot of times, the one that gets to market first is the one that wins with consumers.

A leading industry survey throws up three highlights on the subject of innovation and how consumers perceive it. The survey insights show that the perception of innovation is hugely important in purchase decisions; that consumers are willing to pay a premium for innovative goods and services; and nearly half of consumers buy a new product without fully understanding what it did or how it worked, solely because of the perception that it was “cool.” According to the survey, many consumers are deeply interested in being early adopters of products promising to make life easier and/or better. However, many of the survey’s respondents said that while they are keen to buy new products, they don’t necessarily want to be guinea pigs. To that end, 63 percent favor delaying a purchase until after a product’s been on the market for a while.

→ COLLABORATE TO INNOVATE

Food manufacturing companies and brands need to manage innovation in a way that it is attractive to their retail partners. For this to happen, manufacturers and retailers need to collaborate to help take the product concept to store quick and fast. Fostering an innovation-focused relationship with retailers is also crucial for brands as it adds credibility to new product developments. Retailers want reassurance that new trends will be worth the space on-shelf and when big brands launch trend-driven innovation they can be assured that they add support, awareness and credibility. The innovation team of the manufacturer brand is focused on building a new product based on rich consumer insights and they can do this with invaluable inputs from the retailer’s commercial, category and brand teams. It is best to always take a cross-functional approach to innovation to ensure it works for consumers, retailers and the business.

Innovation teams lead the process from insight and idea generation, through to business proposal sign off. At this point the brand teams take ownership of the product, managing the launch across packaging, communication strategies and in-store execution. Innovation teams need to have some autonomy from the rest of the business and some separation from the day-to-day running, to give them the space to focus on the bigger opportunities for category and company growth. But as they progress from idea generation through to product development, commercialization and execution, this process needs to be crucially integrated with commercial, supply chain, brand and operation teams to ensure that brilliant ideas go through to a credible and commercial launch plan that will drive sustained success.

In terms of how much more they’d be willing to pay for products from companies they deem innovative, nearly 85 percent of the survey respondents were on board with paying more for innovation in electronics, with the remaining 15 percent willing to pay over 40 percent more. Innovation also rules when it comes to new grocery products, with 67 percent of the respondents willing to pay a premium for products they deem to be ground-breaking. Interestingly, beyond products themselves, key qualities of companies that are viewed as innovative are either low- or cost-free for their stakeholders: listening to customer feedback, excellent customer service, honesty, treatment of employees, and philanthropy/community outreach.

With this in mind, the survey insights demonstrate that new products and services, in and of themselves, aren’t the most important characteristics of innovative brands among today’s more educated, economizing shoppers, many of whom prioritize companies that listen, understand and respond to their needs while striving for continuous improvement in their current offerings.

Innovations in Food

The following insights summarize, in four different categories, what we call the universe of food, which allows us to grasp the very complex ecosystem of food and turn it into something we can work and innovate with. These include: Access to food; Consumption and health; Environmental Impact; Connections with others and impact on community.

When making decisions around food, more and more people want to know what went into the creation of it. Where did my food grow? How were animals treated? Are workers’ labor rights

Today’s more educated, economizing shoppers prioritize companies that listen, understand and respond to their needs while striving for continuous improvement in their current offerings.





When making decisions around food, more and more people want to know what went into the creation of it. Where did my food grow? How were animals treated? Are workers' labor rights being respected?

being respected? Consumers will no longer deal with lack of transparency around what they eat and are already requesting Big Food retail players to change. In other cases, they are completely changing their buying habits and turning towards more traditional markets, such as farmers markets, neighborhood stores or online business. This is changing the way people access their food, where they buy it, and how they interact with products themselves in order to make a decision (beginning with the packaging and its labeling).

Food's impact on health is now a well-known subject that consumers care about. There's nowhere to hide. People know their choices around food will impact their health, and expect food brands to make their lives easier around their new habits. That means convenience is still at the top of the list. At the same time, environmental awareness is increasing. Consumers expect food brands to take the lead. Also, food waste is one of the most urgent global problems that need solving. Every step of the production chain, from farming to packaging, deeply influences people's choices. The more solutions food brands offer around these issues, the better appreciated they are by those who care about the future of the planet.

Decisions around where to buy and what to eat are, more than ever, a deeply impactful lifestyle choice that people make from day to day. These choices, in turn, are proliferated through social media, and build community around those value systems. Be it around tradition or technology, food has a strong capacity to generate community. People understand that their food habits define a big part of their overall lifestyle and mindset, and connect them with others that share the same interests and values.

What Defines Food Product Innovation

Product and Process Development is systematic, commercially oriented research to develop products and processes satisfying a known or suspected consumer need. Product development is a method of industrial research in its own right. It is a combination and application of natural sciences with the social sciences – of food science and processing with marketing and consumer science – into one type of integrated research whose aim is the development of new products.

There are essentially four basic stages in these models for every product development process. These are: • product strategy development; • product design and development; • product commercialization; • product launch and post-launch.

Each stage has activities which produce outcomes (information) upon which management decisions are made. In practice, some of the activities performed in the product development process can be truncated, or some stages can be omitted or avoided based on a company's accumulated knowledge and experience. Having defined product development, it is now necessary to examine the issue of what constitutes a new or innovative product. Newness of a product may be judged differently, according to those who perceive it. In the context of consumer goods such as food products, there are three groups of actors: consumers, distributors, and producers. Each may have a different view of whether or not a product is new.

There are many ways to classify the degree of newness of a product. One useful example uses seven categories: • creative products; • innovative products; • new packaging of existing products; • reformulation of existing products; • new forms of existing products; • repositioned existing products; • line extensions.

A more technical assessment defines the innovation spectrum as “new to the world”, “product improvements” and “cost reductions”. It defines three broad levels of innovations: incremental,

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- ▶ Biodegradable or reusable packaging
- ▶ Ingredients with specific health and/or beauty benefits
- ▶ Natural, reduced sugar sweetener alternatives
- ▶ Vegetarian and plant-based eating
- ▶ Ethical transparency in food production
- ▶ Soil conservation and sustainable farming

major and radical. Product platforms were then used to group similar products. Changes to products made within a platform are “derivative” changes. It is also possible through radical changes to form new platforms of products.

Crucial to the discussion of product development is to recognize that “innovation” is contextual. The consumers’ perception of product newness depends on the location of the consumer and the types of food products currently or recently on the market. For example, Asian food products were new products in Western supermarkets in the early 1990s, but they were well-established and traditional products in Asia. The distributors’ views on product newness will depend on the product range of the producers that they interact with and their knowledge of local and other markets. Similarly, food producers will perceive the newness of a product in the context of their product range.

The fact that a food product is not ‘new to the world’, does not diminish its potential importance to a consumer, distributor or producer. Using the example of Asian food products referred to above, the development processes used, the investments required, the challenge of introducing the Asian

food products to a Western market, and the potential financial impact were no less important just because Asian foods had previously existed in Asia. A particular consumer, distributor, or producer will approach new products differently depending on whether they are either completely new to both the market and the producer (never-seen-before-products), or already exist in either the market or the producer (copying of or change from known products). This aspect was included in the classifications system when classifying new products as “Innovative products – completely new to the market (ICNP)”, “Products – new to the company (PNC)”, “Value added products (VA)” and “Line extensions (LE)”.

The challenge for product development is to develop a product which is acceptable to the target consumer. In the example of Asian food products given above, the specific flavors, ingredients and levels of spiciness used in Asian foods sold in western countries are normally significantly different to that found traditionally in Asia. Similarly, ice-cream flavors found in Asia (e.g. coconut, mango, durian, corn) are not popular in western countries, which normally feature

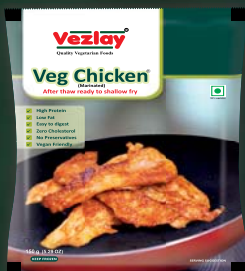
There are more new product launches in snack foods and sweets than any other category, and they’re taking consumers to new places. Within this category, flavor innovation is critical.

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Delivering on value is one of the top trends affecting grocery and consumer packaged goods today; the battleground is no longer on price; the battle is being able to deliver on value in the fresh and perishables part of the grocery store.

chocolate, vanilla and strawberry flavors. Even countries of seemingly similar culture can have major differences. For example, Australians prefer mango flavors in their foods (such as cereals and muesli bars) whereas New Zealand consumers prefer berry fruits in similar products.

The launch of colored ketchup in the USA was a tremendous success for Heinz, whereas the same launch in Australia and New Zealand was a major failure. The key principle in product development, which differentiates this research from all other natural science research, is the mandatory need to ensure the development meets a consumer demand. Without a market, no matter how innovative a change, there will be no sales and the product is worthless.

A major feature that distinguishes food product development is the ethical consideration of producing a large volume of safe food for human consumption. This is coupled to the fact that food raw materials are labile, unstable and must be stored for prolonged periods of time prior to consumption.

Product Development in Food Industry

The definition of product development emphasized that no matter how innovative a change, without sales the product is worthless. To consider food product sales, it is necessary to look to the retail sector; this sector is characterized by intense competition and the dominant position held by supermarkets in many regions of the world. There is competition not only for sales between retailers, but competition between food product suppliers to gain access to retail space. Supermarkets in Australia (population 19 million) and New Zealand (population 4 million) have around 12,000 to 25,000 food and beverage stock keeping units (SKUs) on their shelves. In the USA (population 283 million) and Europe (population 729 million), this number may extend to as high as 40,000. Typically, in Australia / New Zealand, there are between 5,000 and 10,000 “new” products offered to these supermarkets each year (about 18,000 a year in the USA) and about 10% are chosen to be displayed on the shelves. New introductions to the shelves are almost always linked to the discontinuation of another product. Of the 500-1000 new products introduced by the supermarkets each year, less than 1% will still be on the shelves in 5 years’ time.

Even with the degree of competition to enter the retail space, product failure rates are alarmingly high. A study that reviewed the degree of newness of products introduced in the USA food markets estimated that over a prolonged period, only 1 in 100 or 1 in 200 products were really new. It identified 1100-1200 products introduced a year that were innovative, equity transfer products (product with a strong franchise brand name) or line extensions. The majority (about 75%) were line extensions. The retailer would see around 20,000 new bar codes each year. After 39 weeks of launch, 33% were successful, 42% were still in distribution but declining and 25% had failed. Line extensions had a 28% success rate, whereas the other two types of “new” products had a 47% success rate.

The food retail sector places a vast array of products before consumers, but household purchasing patterns appear to be relatively stable.





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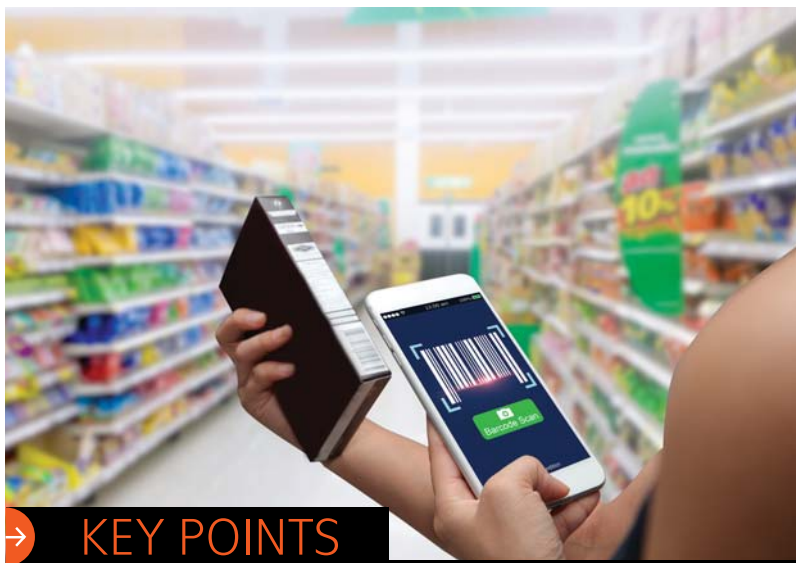
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→ KEY POINTS

- ▶ **Product development is systematic, commercially oriented research to develop products and processes satisfying a known or suspected consumer need.**

- ▶ **There are essentially four basic stages in these models for every product development process. These are: a) product strategy development; b) product design and development; c) product commercialization; d) product launch and post-launch.**

- ▶ **There are several systems for classifying food products on their newness. A comprehensive model is the “Innovation Spectrum”, which defines a product’s newness based on as “new to the world”, “product improvements” and “cost reductions”. It defines three broad levels of innovations – incremental, major and radical changes. Product platforms can be used to group similar products. Changes to products made within a platform are derivative changes. It is also possible, through radical innovations, to form a new platform of products.**

- ▶ **The ultimate test of product development occurs in the market and a new product can only be considered successful if it is a market and financial success.**

In the USA, an average supermarket has about 40,000 SKUs, yet an average family gets 80-85% of its needs from just 150 items. A supermarket shopping exercise takes on average 24 minutes and the buyer would scan 910 SKUs. A survey in the USA revealed the majority of shoppers prepared a list prior to shopping and 72% indicated they would always, or often purchase the same items every time they go shopping for food. Only 26% would buy a wide variety of foods and brands. Another factor related to supermarkets is that of ‘own-labels’. Originally, own-labels were considered to be an alternative choice based on lower prices than branded products.

Nowadays, supermarkets’ own-label products compete on quality, technology and packaging with manufacturers’ leading brands and they take an increasing share of the market. The competition from own-labels has caused food manufacturers to focus on specific product lines where they

have inherent advantages. Firm concentration is particularly evident for those products where the manufacturer’s brands are popular, such as in soup, breakfast cereal, and baby food. High-value brands have often been built on the basis of an innovative product, or range of products, that was particularly successful.

Major supermarkets make extensive use of customer loyalty schemes in which they reward customers for their patronage. However, these schemes also enable supermarkets to record what people are buying, which in turn gives them the capacity to do two other things. First, they can adjust the stock on the shelves to suit the buying preferences of the location of each store. Second, they have a data base of consumers that is several orders of magnitude larger than can be managed by an individual company undertaking product development. If they choose to, the supermarkets can influence the food product development process by closing the information loop back to food product developers, such that products are refined according to customers’ tastes.

A trend towards smaller, more frequent shopping trips and increased sales of instantly gratifying things such as ready meals has been noted by many commentators. This has often been attributed to the increasing number of consumers who are professionals with little time and plenty of money. But the shift is too marked to be explained by demographics alone. Thus, the range of products on sale is driving a change in consumption habits.

It is notable that the efforts of supermarkets tend to support incremental change innovation. Development of radical products is, by definition,



based on an anticipated consumer need rather than a present defined need. Therefore, information on existing consumption patterns and tastes does not give direct assistance to the development of radical products. In spite of food industry efforts to create a more exciting and interesting food culture and new food experiences, there seem to be ever-longer periods between great innovations in the food industry. One simple reason could be that the food industry is low-tech; it is an industry in which it is difficult to distinguish between products. There are few barriers to market entry and it is hard (though not impossible) to use patents or other forms of intellectual property rights in the food sector. So, product characteristics are copied by competitors, who produce me-too products. This low rate of radical change, coupled with the high failure rate of food products following market launch implies that the methodology for new food product development urgently needs to become more focused, quantitative, rapid and knowledge based. Many analyses have focused on developing models for industrial product outcomes, but food products have been neglected. Reviews of literature and discussions with industry staff indicate that no one company remains a benchmark of “best practice”



in product innovation in the food industry. One conclusion that might be drawn from this is that success is highly dependent upon the calibre of staff and the serendipity of the consumer.

An article in *The Economist* spoke of a “crisis of creativity”. The article reported that food firms should invest more in research and development (R&D). According to the Head of a North American consumer-products company, whereas personal-care companies spend an average of 2.6 percent of sales on R&D, food and beverage companies only spend 1.6 percent. It was argued that this is a reason for the low number of real innovations, besides the fact that there is less money

Much of the innovation today is in food packaging, such as packaging that protects flavor and integrity over longer periods of time, while giving the consumer full visibility to the product quality.



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available for upgrading this low-tech industry into a more high-tech industry. Yet opportunities do exist; currently functional foods and drinks are seen as the greatest opportunity to differentiate and protect products and ingredients with patents in high income countries. In the future, it may even be possible to visualize ingredients and foods that can be tailored to consumers' individual genetic properties, with the charting of the human genome in 2001.

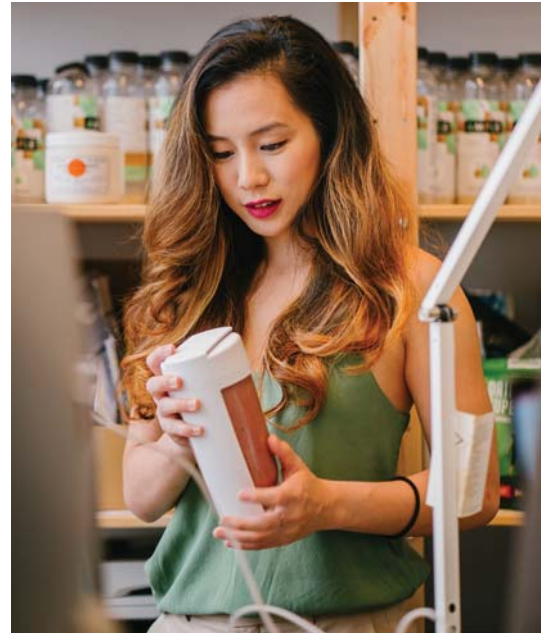
One important view of innovation relates to the degree of innovation that is expected. Previously, this has been discussed in terms of "newness" of a product. The majority of food innovations in the past 20 years have been incremental changes; in other industry sectors, this is called "continuous innovation". Such innovation takes place within existing infrastructures and builds on knowledge in existing markets without challenging the underlying strategies and assumptions. It is worth noting that some published literature describes true innovation

Product innovation and convenience are spurring growth within segments of the frozen food industry.



in the food industry as being in its hey-day during the 1960s and 1970s. This was when really novel food products were introduced and companies (such as McDonald's, Proctor & Gamble, General Foods, etc.) were regarded as the leading innovators of all industries at the time. Since then, the industry has become more introverted and the rate of truly novel foods has greatly declined. So has the profitability and corporate stability of these food organizations. McDonald's has not had a really novel food introduction since the burger in the 1970s. In the eyes of many, the novel innovators of today are the information technology companies and biotechnology groups.

In recent years, some major food corporations have begun a new corporate strategy, which



has been termed "discontinuous" innovation. Discontinuous innovation involves a strategic jump to a totally new paradigm. This may involve novel technologies or ingredients, or the application of knowledge generated in one discontinuous area to another. A good example was the introduction of the MARS confectionery bar as an ice-cream confectionery. MARS Corporation at the time had no skills in ice-cream and the key ice-cream manufacturers (Unilever and Nestle) had no skills in confectionery.

This sort of innovation may extend beyond specific food product identification in order to capture the value that the customer places on the product. In some cases, food products can embody services and intangible benefits that complement the food product itself and add to its value. For example, in some markets, useful food storage regimes might involve drying foods, which need to be re-hydrated prior to use. This may be excluded in these markets because of the lack of availability of a safe and reliable water supply. The opportunity for a food company may be to provide the water supply for a community (market niche) and thereby gain the market opportunity and brand support for their dry foods. The key to discontinuous innovation is to identify the limits of knowledge or capability and extend the realm of possibilities beyond the obvious.

Food Categories Witnessing Innovation

Among food categories, candy and snacks are considered an innovation machine. There are more new product launches in snack foods and sweets than any other category, and they're taking consumers to new places. Within this category,

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Ready-to-cook sauces made from authentic recipes

Kanhai Porecha, Founder & CEO of VinZillion Edibles Pvt. Ltd., a convenience food company that sells the Zissto range of sauces, talks about his product's innovation in offering ease and speed in people's cooking & eating needs.

➔ **What is the Zissto's innovation and what consumer need does it fulfil?**

Zissto has been born out of the need to offer a range of authentic ready-to-cook sauces from various regions of India. Today, the brand is helping people to save time and offers them the best of both worlds – restaurant-style food with the touch of home.

Anyone who's short on time – home-makers, working couples and bachelors – are our target audience for this convenience food; since it saves time while offering the variety and nourishment they need.



Kanhai Porecha

Some of the occasions people use our products are – tired from work with less time to cook, last-minute guests showing up, wanting to explore new regional dishes whose ingredients may be hard to find, etc.

How healthy and tasty are Zissto sauces compared to other sauces available in the market?

Of-course, a lot of research went into getting each recipe right. Chefs and mothers from across India have helped us achieve this. We have hired senior professionals – chefs with region-wise culinary expertise, nutritionists, technologists and managers to help us produce small-batches of each product as required. We do not add any artificial colours or flavours and try to keep our products as natural as possible.

I was clear right from the beginning that I would not compromise on the process and quality even if other players

came in with cheaper products. I'd like people to have the best possible products at the most affordable prices.

In a blind test that we did recently, consumers found our product tastes quite fresh, though it has a 12-month shelf-life. That is because we choose the freshest ingredients to maintain our quality, closely manage our supply-chain and, most importantly, our hygiene standards.

What is the current range of Zissto sauces?

Our current RTC sauces are: Bhuna, Chettinad, Handi, Makhani (also in a Jain version), Malvani, and Pizza-Pasta. In September this year, we'll also be launching Bengali, Chole, Haryali, Pav Bhaji, Malabari, (plus Jain versions of Pav Bhaji & Chole).

You can cook with Zissto sauces in 3 easy steps: 1) Stir fry veggies or non-veg (chicken/seafood) of your choice in a pan, 2) Add Zissto sauce and water, 3) Simmer for 10 minutes and it's ready.

Where are they currently available?

What are your future plans?

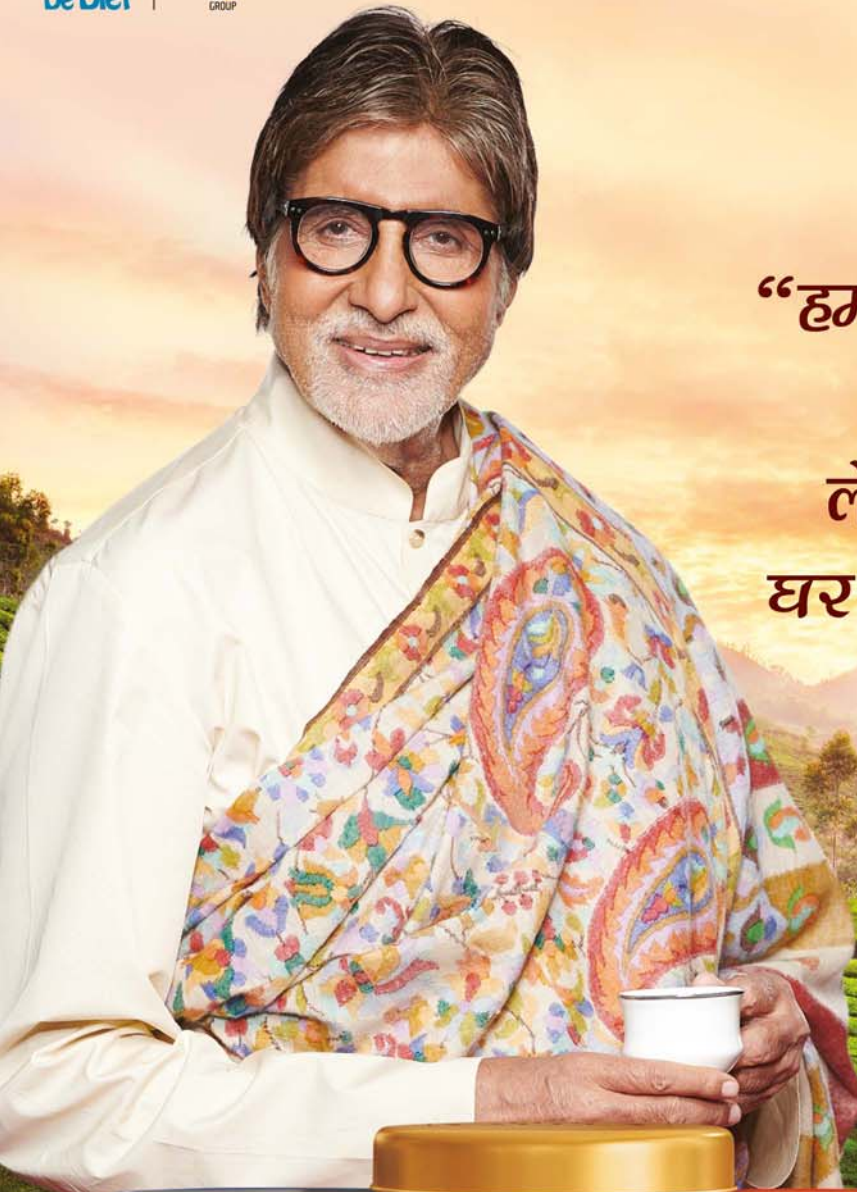
Zissto sauces are available in 250 gm glass jars. The brand is currently available in about 60 General Trade stores in Mumbai. We've just begun discussions with people in Modern Trade. Since our products have a Pan-India and international market, we need to look into those geographies as well. We have plans for other product categories including chutneys, masalas, etc., which we intend developing under the VinZillion umbrella.

For the moment however, our focus is on building our presence, as well as consumer awareness specifically about the range of Zissto cooking sauces.



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flavor innovation is critical. And the rise in snacking occasions has provided the category with a tailwind as consumers become increasingly motivated by the desire for snacks that are healthy, permissible, indulgent, and a treat. Similarly, better-for-you, single-serve and ethnic flavors are among the market drivers for frozen and refrigerated foods. Product innovation and convenience are spurring growth within segments of the frozen food industry. Driven by products that meet consumer demand, select segments of the frozen food industry are posting impressive growth.

Aggressive innovation by companies is helping them corner a bigger pie in various product segments. These savvy companies — and the retailers that sell their products — are heeding consumers’ demands for healthier alternatives. Across all demographics, snacking today has universal appeal and accounts for a steadily rising share of all eating occasions. Adults snack as much as children do, while women snack slightly more than men. And as for millennials and baby boomers, more than half of their eating occasions are snacks.

Whether the snacks are fresh or frozen, it’s important to understand “what consumers are eating and where they’re eating it,” so as to come up with innovative snacks that offer consumers with affordable mini-meal options. In this context, frozen snacks look well poised to compete as fresh-frozen technologies blend the best of both the fresh and convenient worlds. Industry analysts believe that frozen snacking is set to see an evolution of unique items such as frozen mini hamburgers, or sliders, that have just-off-the-grill taste and there’s going to continue to be much more of that kind of innovation.

Another rising star could be frozen handheld food. Tapping into consumer demand for convenience and value, frozen breakfast handheld food sales have the potential to skyrocket in growth spurred by new innovations. New product



➔ KEY POINTS

- ▶ The retail sector ultimately determines the food products that are placed before the consumer. Within this sector, supermarkets are particularly influential and have the capacity to change tastes and habits through the placement of products on shelves.
- ▶ Reports of the newness of food products introduced and their success vary. In general terms, only a very small proportion (1% to 2%) was radical changes and the majority (75%) were incremental changes (me-too products). 75% of new food products were considered to be failures.
- ▶ The strategy of supermarkets in introducing own-labels and their ability to mine information from customer loyalty schemes is influencing product development in the food sector.
- ▶ The food industry has a low R&D intensity as a % of turnover.

introductions in frozen breakfast handheld foods can help create excitement in the segment. Examples of successful innovations in developed markets include breakfast sandwiches made with whole grain muffins, egg whites and turkey sausage, all of which meet the growing consumer demand for better-for-you products.

Fresh is another category where innovation can play a greater role than ever. To consumers, fresh departments are the places to get healthy foods. Among fresh sections, produce sets the tone for the rest of the store. Produce is a cue to consumers and if a store does produce well, they’ll get a pass on the other areas of the store. It has a halo effect. The perception is that the rest of the store is high-quality as well. This is an opportunity for grocers to gain customers as fresh is the cue to health and wellness, and to other areas of store.

Consumers’ broad definition of fresh food includes everything from prepackaged hummus and guacamole, cheese that’s cut and wrapped in the store, complete meal solutions, and prepared salads, to everything you scoop into a tub. These foods appeal to consumers because they’re fresh and convenient. Plus, they appeal to last-minute shoppers who are willing to pay a premium for





Innovations have been discussed not just as an opportunity but also as a pre-condition to assure the sustainability of the food sector. It is an important instrument to stand out from the competition and satisfy new consumer needs.

→ RECIPE FOR SUCCESSFUL NEW PRODUCT DEVELOPMENT

Oftentimes product developers and business leaders are looking for data proofs to ensure their success in the marketplace. In the real world, the ironclad promise of success does not exist. Metrics are great, but you need to have faith and believe in what you are bringing forward. Product development too often focuses on one piece of the consumer puzzle without taking into account the shifting context into which that piece of the puzzle fits. Where a lot of people get stuck is in the silo of their business units. They see the world only from that perspective, and they lose the perspective of how the consumer sees their world.

For companies to exceed consumers' expectations, they need to aim beyond their current experiences. Work smart, work fast, fail early and make it happen. Challenge your assumptions regarding the need for new products. Reconsider the problem and look for comprehensive solutions to innovation challenges. You can't necessarily 'productize' your way to success. Consider the entire context and look for cohesive solutions to marketplace challenges. Don't fall into the trap of only selling what you can make today.

Talk to the customer — and your employees and retailers — at all stages of the new product development process. Talk to your stakeholders when you are thinking about creating a new product. Then talk again as you coalesce the idea and then before, during and after launch to be sure you are tapping into what consumers and retailers want and need. Learn from your mistakes and successes. Understand the best timing for your launch so that you can capitalize on when consumers purchase the product and media covers the space. Think like a consumer. Would you buy this product? Think like the media. Would you cover this product? Ask lots of questions and don't be satisfied until you get good answers.

With insights from those entrenched in new product development, take a moment to rethink and retreat processes. Take risks, act fast and regain momentum as the economy does, and thus the marketplace and today's consumers. Those are words and guidance from the wise — from the minds of innovators.

fresher foods. When consumers are shopping the fresh areas of the store, they're looking for inspiration; often, they're looking for dinner ideas. They want to be inspired and have fun. They're more willing to do something different. The nature of the trip is, 'What do I do?'

Industry observers see a trend where consumers are deeming fresh foods as healthier than the alternatives — sometimes erroneously so. They're eschewing reading the ingredients list or the nutrition facts panel. Fresh is a cue for healthy, in consumers' perceptions. It's not the calories. In fact, it might be high in fat and calories. These consumers want to be able to pronounce the ingredients and foods with a short list of real ingredients are in vogue. So, minimally processed foods and products with a short list of real ingredients are in, and real, fresh and natural foods have broad appeal and are sought after by more consumers.

However, the main challenge in the fresh category is for the industry to redefine 'value' for the customer." Delivering on value is one of the top trends affecting grocery and consumer packaged goods today; the battleground is no longer on price; the battle is being able to deliver on value in the fresh and perishables part of the grocery store.

Among the other notable trends that are attracting innovation are a greater number of gluten-free products than ever, with more items offering tastes on a par with their gluten-containing counterparts; natural/organic is still big, with entries spanning the skin care, cereal, candy, snack, frozen, center store, meat and produce sections; unusual flavor combinations add interest to food and beverage lines; and convenience may still be king, but manufacturers





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In order to stay relevant in this rising tide of market segmentation, the average food company must disrupt traditional business models by learning to quickly anticipate trends.

are increasingly balancing portability and ease of preparation with more nutritious ingredients and healthier cooking methods (e.g., baked vs. fried).

Looking ahead into the future, the ever-evolving grocery industry will continue making space on store shelves for as-yet-unthought-of concepts that will soon morph into mainstays.

Innovate or Die

‘Innovate or die’ is a phrase often used to describe the approach brands must take to stay ahead in an ultra-competitive market characterized by rapidly changing consumer demand. Nowadays, the term “innovation” is increasingly used in all science fields. It has been developed into a trendy word that is referred whenever discussions focus on forthcoming developments or future perspectives. Nevertheless, despite its frequent usage, innovation is neither easy to specify and nor to identify. What does innovation truly represent? It is a new idea that when implemented, leads to a more effective process, product, service or technology. Innovation provides better solutions that meet advanced, unaddressed or existing market needs. It can be considered as a breakthrough that provides a different way of thinking, consuming or living. However, the key element of innovation is the precondition noted above:



“when implemented“. Without implementation, “innovation” turns back to the “idea” status.

Food industry is facing technical and economic changes in spite of society, manufacture and food processing. This fact has affected significantly the entire food supply chain (e.g., distribution of food to the consumers), forcing companies to pay high attention in food products that meet the consumers’ demand for a healthy lifestyle. As a consequence, there is an extensive dialogue about the need of food industries to introduce innovations in the market in order to survive competition. Innovations have been discussed not just as an opportunity but also as a pre-condition to assure the sustainability of the food sector. It is an important instrument to stand out competition and satisfy consumer demands. Ultimately, they are the tools to success in a hard economic environment, the carrier to penetrate new markets and the key to establish new products or processes.

On the other hand, food industry is traditionally considered as a sector with low research intensity. Although researchers develop continuously innovative products and technologies, their applications in the food industry meets several obstacles. The latest fact concerns more the introduction of the innovations within the food industry as well as the reaction of related consumers, and less the technological adequacy of the innovative techniques. Indeed, there is a gap between R&D strategy developers and technical R&D associates, as well as a lack of interpretation between the information received by food technologists and consumer scientists.

Today, the cutting-edge areas of the food industry include bio-based packaging materials, functional foods, food waste recovery, adoption of ICTs, foodomics, emerging technologies, etc. The development of sustainable innovations in these areas starts by dealing with long term R&D issues (e.g. networks development, open innovation, the role of innovation policies, etc) and technical aspects (e.g. conventional versus emerging technologies) prior identifying resistance issues and designing strategies that meet the needs of the food industry. **PG**

In the next few pages, we bring you examples of companies whose food innovations are serving to deliver a new value proposition to the market through on-trend formats, new concepts, fresh ingredients, and flavor mash-ups.



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Tea Valley introduces new flavors and mixes of Assam Tea

➔ **Company and brand profile:** Tea time is the moment of your day when you take out time to think, reflect or converse. Think about it, you start your day with it, collecting your thoughts and planning the day ahead. Over the rest of the day, you call for tea every time you need a break. Simply put, tea is not an occasional indulgence; it's the Indian way of life.

For a country that truly loves its daily dose of tea, Tea Valley, with its truly original Assamese tea, has already made inroads into the hearts and minds of true tea connoisseurs across India. Started by the globally renowned DJ group, Tea

Valley has today set the benchmarks in taste, processes, practices and quality in the industry.

Having made a name for themselves in the hospitality sector, FMCG products, and in the field of entertainment, the DJ Group has become an integral part of the daily lives of countless Indians. Led by the visionary Dinesh Jain, DJ Group has been consistently evolving to address the needs and aspirations of the modern day Indian consumer. This led to the creation of the De Diet Chef India Pvt. Ltd., a part of the DJ Group.

Product portfolio and customer segments:

In the category that Tea Valley operates in, there are three kinds of consumers: The first kind is those who prefer Taj Mahal or Tata Gold; The second type comprises those who prefer Tata Premium, Wagh Bakri and Red Label; and the third segment is consumers of Tata Agni, Brooke Bond Taaza, etc.

Tea Valley brand caters to all kinds of black tea consumers. Tea Valley is for first segment; Tea Valley Royal is for second segment of consumers; and Tea Valley Classic and Tea Valley Utsah is for the third segment. Tea Valley sources the majority of teas only from Assam and Dooars in order to offer the best tea drinking experience. In fact, its top variant has 100% original Assam tea with aromatic long leaf.

Major markets:

Tea Valley products are currently available in north India. The brand will soon be expanding its operations to East and West India. The company plans to take the brand

across India within one-year time frame. It sees the whole of north India as a strong tea drinking market. Within this region, UP, Rajasthan and Delhi are key markets for the brand, just like any other brands in the category.

Brand's innovation highlights: Every leaf of Tea Valley brand is picked from the valleys of Assam and Dooars and has the rich flavor and aroma of the Brahmaputra. The tea is a unique blend of 100% original Assamese tea with choicest aromatic leaves, which makes every sip a memorable experience. Tea Valley is today setting the benchmarks in taste, processes, practices and quality in India's tea industry. The brand works with experienced master blenders with years of experience in the Indian and international tea industry. Their knowledge of tea cultures has enabled Tea Valley to create masterful blends of Assam tea for Indian and international tea lovers.

Retailing and marketing strategy: The company believes that all channels are important for delivering incremental business – be it General Trade, Modern Trade, E-commerce. Tea Valley products are available at Reliance SMART Stores, Spencer's Hyper Stores in Delhi NCR/ Punjab, Rajasthan & MP. The products are also available at Walmart's Best Price outlets in Punjab, Jammu, UP, MP & Chhattisgarh, LOTS in Delhi-NCR, besides at regional chains in all States where the brand is present.

For any new brand to enter in such an evolved category, the biggest challenge is to create awareness and generate consumer trials. In order to overcome this challenge, Tea Valley looked at some celebrity options and picked Amitabh Bachchan as its brand ambassador. So far, its TVC has been very well appreciated by consumers and the brand will soon launch a new campaign highlighting the goodness of its products.

Roadmap ahead: Tea Valley will continue its quest of perfecting the art of tea making and keep introducing new flavors and mixes of tea to establish Tea Valley as a global brand. Black tea premium tea bags, a range of green tea offerings, herbal and iced teas, all of which offer countless health benefits, are among the products that Tea Valley will launch by December 2019.

“



By combining modern day processes, researches and practices, De Diet Chef India with its Tea Valley brand is setting the benchmarks in taste, processes, practices and quality in the tea industry.

– Namit Jain
Director, De Diet Chef India Pvt. Ltd.



Cocofly brings coconut goodness to its products

➔ **Company and brand profile:** Nilgai Foods operates Cocofly (cocofly.co), one of India's leading packaged coconut products' brands. Cocofly is currently the most widely distributed coconut water in Delhi (10,000+ retailers), and is one of the only health food brands globally that focuses entirely on the goodness of coconut and "everything coconut" as its unique health positioning. The brand is currently available across 10 States in India with offices in Mumbai and Delhi. In addition, Cocofly is available in the UK, the USA, and Gulf region.

Portfolio and best-selling products:

The Cocofly product portfolio comprises coconut water; desiccated coconut powder; coconut milk; extra virgin coconut oil; edible coconut oil; and coconut chips. Coconut water continue to dominate the brand's sales with over two million packs sold last year. However, with its widening coconut products portfolio, the brand expects to see desiccated coconut sales growing rapidly the coming months.

Brand USP and differentiators: Cocofly sources coconuts directly from the farm and has built up an extensive network of farmers and aggregators that it works with closely. The result is top quality produce at affordable prices. Furthermore, it has partnered with some of the most sophisticated processing units in the country that use state-of-the-art technology and imported equipment to improve the quality further.

Customer segments and key markets:

The brand has a varied and diverse customer base – from young children, mothers, youth as well as the older generation. This is because health is a major purchase decision influencer for mothers of young children as well as older generations and it is also increasingly important for young, urban middle and upper middle class citizens.

While focusing on these segments, the brand has also introduced bulk SKU formats for the

“



Cocofly sits at the convergence point of various health trends and is dedicated to the goodness of the coconut in all forms.

– Arjun Gadkari
MD, Nilgai Foods Pvt. Ltd.

HoReCa and institutional markets as these markets have shown tremendous demand for its products. In the coming months, it foresees itself engaging more vigorously with buyers from the HoReCa segment, which will likely dominate its topline growth in the coming months.

Brand's innovation highlights: All Cocofly products have been launched against the backdrop of growing health awareness. Earlier, this year, the brand expanded its product portfolio to include many innovative coconut-based products. These include cold pressed extra virgin coconut oil, an everyday edible coconut oil, cans of coconut milk, and standing

pouches of desiccated coconut – coconut chips that are thinly sliced shavings of coconut flesh, baked not fried – as a unique alternative to fried snacks.

With the interest in coconut products growing, the brand has plans to introduce flavored coconut chips as well as a flavored range of coconut water. Also, noticing that more people across India are looking for dairy alternatives, the brand plans to launch more alternatives to soya and almond as a milk replacement.

When it comes to packaging design, the brand stands out apart from the competition owing to its focus on eco-friendly packaging and its vision of converting to 100% eco-friendly packaging by 2025.

Retailing and marketing strategy:

Cocofly is focusing on both Modern Trade and General Trade for retail outreach. The brand is seeing high per-store sales each month and its MT sales have experienced the biggest year-on-year growth. However, as a vast majority of Indian retail sales still come from general trade, this channel continues to be the core focus of the brand's retail strategy.

As consumers today consume content online at a rapid pace, the brand is also prioritizing online brand awareness for its products, apart from driving the traditional ATL mediums like print or TV.

The brand's supply chain remains one of its greatest assets and the company has, over the years, partnered with a reliable set of third party manufacturers to produce the products to the exact specifications under the supervision of Cocofly's own quality and production team.

Roadmap ahead: Cocofly is focusing on three core areas for the next three years. It wants to increase its retail presence into other major metros across the country and become a household retail name. At the same time, it is establishing its brand in the institutional market and pushing volumes through B2B sales. Going ahead, the brand will aim to grow its overseas footprint and become a known brand outside of India as well.



Early Foods offers wholesome products for infants

→ **Company and brand profile:** Early Foods Pvt. Ltd., established in 2016, is a premium organic food company catering to the nutritional needs of infants and their breast-feeding mothers. Acting on its social responsibility of creating a healthy future for the new-borns, the brand's mission is to bring back traditional Indian superfoods like millets, dry fruits, seeds, pulses and other cereals and make them a part of people's diets. The brand has developed simple recipes of meals and snacks for children, pregnant and breast-feeding mothers.

Product portfolio and best-selling products: Early Foods' current product portfolio comprises 25 products, which includes a whole range of porridge mixes, jaggery cookies, teething sticks, health drinks and superfood blends for kids, pregnant, and breast-feeding mothers. It wants to offer a healthy food option at every stage of a child's growth to ensure a parent in need gets to feed nutritious food as against something laden with refined flours, excess sugar and preservatives.

While most foods brands catering to children are focused on providing healthy snacks, Early Foods has built a product range to keep it wholesome by offering a wide variety of both meals & snacks.

The brand's best-selling product is the ajwain teething sticks. It has helped the company procure the number one position on Amazon in the pacifiers and teething segment for the past 8 months. Its millet-based porridges too are doing good sales online. The brand currently sells over 15,000 units per month across e-commerce & retail channels, with e-commerce contributing a larger chunk of its sales.

Customer segments and markets: The brand's customers are present everywhere because all parents want their children to eat healthy foods and Early Foods is fulfilling that promise. Metros contribute a significant chunk of its business and account for about 50% of the company's turnover.

The remainder 50% of the business comes from over 1000+ other smaller cities in India. As e-commerce remains



the company's dominant sales channel, its products are able to reach everyone without any regional barriers. Outside of India, the company sees a lot of potential in the USA, Canada, UK, and the UAE, and will soon be expanding its footprint in these regions. It will also continue to build more products in the Mom & Child Nutrition segment and has about 15 new products in the pipeline.

Brand's USP and differentiators: The brand extensively uses 8 different millets – finger millet, little millet, foxtail millet, barnyard millet, etc., that are nutritionally dense in minerals, vitamins & fibre as compared to just rice or wheat-based products. It does not use refined flour or sugar like maida or white sugar in its products. Instead, it uses whole grain flours and jaggery. Last but not least, it has eliminated all processed flavors, raising agents, stabilizers, thickeners, preservatives, etc, from its product range. In fact, even the cookies don't contain



Early Foods is on a mission to bring back traditional Indian super foods like millets, dry fruits, seeds, pulses and other cereals into the diets of Indian consumers.

– Shalini Santhosh Kumar
Founder & Director,
Early Foods Pvt. Ltd.



soda or baking powder. All products are made from simple wholesome ingredients available in every Indian kitchen.

Brand's innovation highlights: Early Foods recently launched its range of cookies for pregnant and breast feeding mothers. These cookies are mindfully made from millets and dry fruits naturally rich in calcium, iron, folic acid, and protein. New mums commonly experience tiredness, hunger, sweet cravings, and these jaggery cookies offer a healthy munching and nourishment option for both mothers and their growing baby, instead of just a calorie-laden snack.

Trends in the category: Consumers are shifting their preferences toward health & wellness products, which are creating a lot of buzz on media platforms, including on social media. People, especially parents, are becoming more informed about the health and well-being of their children and are looking for healthier food options. Parents are becoming more conscious about the food that they eat themselves and even more conscious about the food they feed their children. Early Foods products conform to 'fresh', 'healthy' ingredients and 'no junk' criteria and so parents are happy choosing its products without any second thoughts.

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InnerBeing focuses on recipe twists for modern use

→ Company and brand profile: InnerBeing innovative wellness products motivate people to live healthy lives. The products use local ingredients and are made from natural ingredients, free of chemicals and synthetics. The brand uses simple recipes and turns them into innovative products.

InnerBeing has commercially launched its products in Hyderabad, Bangalore, Mumbai, Pune through multi channels like Retail, Health & Organic stores, Hospitals, Fitness Centers, Nutritionists, Hotels, E-commerce portals, Institutions and will be expanding to another 10 cities by the end of 2020.

Portfolio and best-selling products: InnerBeing has a wide range of products enriched with superfoods – chia seeds, pumpkin seeds, quinoa, pea protein, etc, with millet as the base ingredient. Among its best-sellers are products like jowar idli, jowar upma, foxtail millet, ragi multimix, quinoa & millet blend.

Brand USP and differentiators: Through its R&D, the company is engaged in developing indigenous and fiber-rich cereals such as quinoa & millets – ragi, jowar, foxtail, and bajra – thereby reviving traditional Indian food not only in its natural form but also introducing its use for making pasta, noodles, and other condiments and to bring back nutritional value in the otherwise simple carbs diet.

Brand's innovation highlights: Apart from the basic recipes, the company has also launched an innovative range for the modern lifestyle, which is ready-to-cook healthy breakfast and snacking options

“



Currently, InnerBeing has 15 products and would be introducing a range of 20 more products by the next quarter. We are looking to attain a leadership position with at least 25% market share in the healthy breakfast and snacking arena in the next two years.

– C.S. Jadhav
Director & Co-founder, InnerBeing

such as quinoa porridge, millet pancake, ragi chocolate drink, millet pizza, millet cookie mix, and nut & millet cake. The company is also developing its ready-to-eat snacking range, which are novel and first-of-its-kind products like jowar pops, bites, namkeen, cookies, crackers – all baked and enriched with plant protein.

InnerBeing is formulating products with attributes such as gluten-free, plant protein, no added sugar, no added preservatives, and high fiber. Keeping these attributes in mind, the company has brought about innovation in the health food sector by bringing organoleptic characteristics through its constant research by experts like food technologists, chefs and nutritionists.

Customer segments and markets: InnerBeing products' key markets are the metropolitan cities such as Mumbai, Delhi-NCR, Bengaluru, Hyderabad and Pune. Its key customer segment belongs in the age group of 25 plus years (millennials) and above who are constantly seeking healthier options for a better lifestyle. With a clear focus on this target segment, the company has piloted and commercially launched its products in Hyderabad followed by the other metro cities.

Retailing and marketing strategy: InnerBeing strategy is to build strong communities comprising chefs, nutritionists, fitness enthusiasts, and lifestyle coaches. Through strong content marketing, it is driving the conversation among its consumers and building strong communities.

The brand is also strengthening its digital presence through advanced social media tools and heavy target marketing campaigns to drive conversions through Facebook, Instagram and other social media channels.

To widen its consumer reach further, it has embraced influencer marketing and is tapping into their huge network to increase the consumer awareness for its products. By selling products online on its portal – www.innerbeing.com – the company is able to reach consumers beyond a limited geographical location.

The company's products are available at reputed retail outlets and on various E-commerce portals such as Amazon, Flipkart, Bigbasket, etc, high-end apartment retail stores, B-class supermarkets, Pharmacy food chains and Tata Quality Malls (TQMs). The brand is currently available in about 750 stores across the metros – Hyderabad, Mumbai, Bangalore, Pune and Delhi.

Roadmap ahead: With the increasing demand in healthy breakfast and snacking products, the company has witnessed 50% growth y-o-y over the past three years of its operation. By the end of 2020, it will expand its footprint further across the country and also foray into global markets like Dubai and South East Asia.





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Kwality is known for flavorful cereals and masalas

→ **Company and brand profile:** Pagariya Food Products Pvt. Ltd. has brought about a revolutionary change in the country's manufacturing landscape through its wide range of products under the Kwality brand name.

The company's state-of-the-art production facilities produce one of the largest ranges of food products in India – 60+ products in 150+ different pack sizes to satisfy all the needs of housewives today and also to cater to the needs of consumers from different strata of society.

Portfolio and best-selling products: The product range covers masalas, spice powders, soup powders, instant mixes, ready-to-eat products, and breakfast cereals like corn flakes, choco flakes, fills, muesli, etc. Kwality masalas are the company's best-selling products.

The company has also introduced many products for the first time in the Indian market. This range of 'first products' include gobi manchurian mix; noodles masala, pasta masala, fruit rings, among others.

Brand's USP and differentiators: The company uses innovative methods in the production of cereals, which come in different flavors and have added micro-nutrients.



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For the first time in India, we have launched pasta with taste maker at Rs. 10 from this year onwards.

– Naresh Pagariya
MD & Founder,
Pagariya Food Products Pvt. Ltd.

“



We plan to come up with more healthy and nutritional products at affordable prices in the future.

– Dheeraj Jain
Director,
Pagariya Food Products Pvt. Ltd.

As a leading manufacturer of masalas, Kwality has been bringing the specialties of Indian spices and sharing the knowledge of blended spices with the Indian kitchen. The product range unravels the magical combination of different spices to form a good mix of masalas for making delicious dishes. Besides, the products don't contain any added artificial colors/ flavors or preservatives. The raw materials are sourced from the best cultivators from different regions of India and are processed according to internationally accepted guidelines. The products come in world-class packaging featuring 'aroma retention' technology to deliver fresh taste and flavor in the kitchen.

Key customer segments and markets: The bulk consumption of breakfast cereals is in Tier-1 and Tier-2 cities. This is because of the long working hours and the increased share of working women, which is pushing them to look for faster breakfast arrangements. Modern trade and A-class outlets are the target customers of the brand and the key market. The brand has marked its presence in south and west India and the products are also available on major online sites.

Brand's innovation highlights: The combi-pack range is the latest innovation by the brand and is a scaled down package

of its existing cereals. The variety in the combi-pack allows consumers to try a different breakfast every day. And its small size makes the combi-pack an ideal on-the-go breakfast for kids and young adults. The combi-pack is positioned as a quick snack with variety and comes in 7 ranges and four different varieties – choco flakes, choco fills, strawberry fills, and fruit ring.

The latest addition to Kwality's innovative product range is instant pasta, which contains ingredients like durum wheat, which is dried not fried. It is a healthy snack option, and comes in Indian masala flavor at just Rs 10.

Retailing strategy: The company operates in four channels – General Trade, Modern Trade, E-commerce, and Exports. In E-commerce, Kwality products are available on Amazon, Flipkart, Bigbasket, to name a few. For Modern Trade and E-com, the brand's focus is more on its large packs, and on smaller packs for General Trade.

Kwality products are available at all Modern trade outlets. In General Trade, the company has over 450 distributors across south and west India with over 35,000 domestic retailers. Kwality products are also exported to various countries abroad. Its bulk packs are made for the convenience of Institutions and caterers. It is also supplied to army canteens all over India.

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Morriko makes healthy fruit snacks using solar tech

→ Company and brand profile: Gujarat-based Morriko Pure Foods Pvt. Ltd. was incorporated in 2016 and started commercial production in January 2018 at its newly constructed 20,000 sq.ft. facility. A year later, it is already India's largest solar dehydration facility to manufacture dried and dehydrated fruit snacks, vegetables, herbs, spices and dried ready-to-eat meals.

The process technology used in manufacturing the products is unique and uses eco-friendly and renewal solar energy to generate hot air, which is the core of all the dehydration process.

The brand is following all the latest international food quality and safety standards to manufacture its products. Morriko Pure Foods is ISO 2200:HACCP certified, USA FDA registered company, and it follows a lean manufacturing process control system.

Product portfolio and best-selling products: Morriko manufactures all kinds of dehydrated and dried fruit chunks, slices, bars, rolls and trail mixes and has also added dried fruit and vegetable powders in the portfolio. Recently, to up its innovation game, the brand has ventured into manufacturing of dried and dehydrated ready soups and meals like poha, upma, dal khichdi, pav-bhaji, baigan bharta, etc. With such a wide range of products under one umbrella, Morriko products are also available with all kinds

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We have ideas and strategies that can further increase our production capacity and make our products global. With the right funds, resources, strategies, and team in place, we want to be a game changer in dehydrated fruit market in India.

– **Tanmay Bipinchandra Shah**
Managing Director,
Morriko Pure Foods Pvt. Ltd.

in a position to offer more than a 100 customized and exclusive formulations to match the customers' specific palate and needs. Innovation in technology and innovation in formulation, recipe development and packaging upgradation has been the brand's forte and they support and boost customer satisfaction and loyalty for the brand.

Marketing and retail strategy: The company has recently launched its own brand called 'Kamdhenu Foods' for venturing into e-commerce, modern trade, along with HoReCa, in-flight and airport sales. This is the core B2C strategy of the brand and as part of this strategy, it is focusing on increasing the sales via Modern Trade and E-commerce. The brand has tied up with e-commerce vendor agents and appointed distributors for Modern Trade. It is partnering with logistics providers and other third party supply chain management companies to strengthen its supply chain work.

Other than this, the brand is also looking to enter more B2B areas, which include private labeling, co-packing, and contract manufacturing. Besides, it is planning to go for NDA (non-disclosure agreement) with its respective buyers to develop, manufacture and store any specific recipe material. This will help grow its wholesale, bulk trade and exports in bakery, ice-cream, dairy, health bars and breakfast cereal industry.

Thanks to the quality of its products, the company has been able to draw a loyal base of customers who have been active word-of-mouth propagators of its B2C brand. For its B2B business, the company is relying on its participation in trade shows and on media advertisement.

Roadmap Ahead: With its current strategy in place, Morriko plans to expand its reach to more than 25 cities by the year-end. The company believes that as a start up, it is strategically well equipped and ready for a market leap by the end of year. CSD supply and institutional sales is also a part of its retail strategy. Further, the brand wants to be a supplier and vendor to some of the big players in the industry.

of customization possible.

Mango is the company's hero product with all varieties of mango showing great potential and sales growth. But the knight in shining armor is the sugar-free jamun, whose sales continues to increase by the day. Masala fruits was a festive season hit last year and remains a steady performer. Like-wise, the age-old tried and tested Aam Papad is showing good growth with over 65 tonnes of sales so far. The company expects its new sugar-free range products to be a hit in the years to come.

Brand's USP and differentiators: All Morriko products are prepared using only 10% sugar at input stage, which makes it the lowest sugar content product in the market. The recipe of the products and their formulation is the big differentiator for the brand. Morriko has a dedicated team of experienced personnel to take care of the manufacturing process and keep ahead of the changing times and trends in modern day lifestyle.

Brand's innovation highlights: The brand is at the centre of innovation in product development for meeting the growing demand for health fruit snacks. It is now



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On The Run stands for clean label, simple ingredients

➔ **Company and brand profile:** Stayfit Enterprise is a Health Food company manufacturing products under the brand name “On The Run” and aspires to be India’s most trusted health food brand in the packaged snack segment. The brand’s core values are enshrined in its health positive and clean label products, which are meant for the working urban population – always on the move and looking out for nutrition with convenience. The products are portion controlled for consumption on the go and are currently available in Pune, Mumbai, Bangalore, Chennai, and Hyderabad in retail and all over India through e-commerce and health tech platforms.

Product portfolio: Until March last year, On The Run had only energy bars in the market. But since then, the company has launched a portfolio of products in different categories. It has launched supergrain pops, which is millet-based puffs and it recently launched seasoned trail mixes, tea & coffee bites. Later, this year in October, it will also launch its plant-based protein products.

Brand USP and differentiators: On The Run is the only brand that asks its consumers to read the label. The products contain 4-5 ingredients, which are easily available in any kitchen and contain nothing else unlike the long list of ingredients on almost all packaged food. On The Run products fit perfectly in the mid-meal segment and are 100% natural, without sugar, and use only best-in-class ingredients.

Customer segments and markets: Currently, Mumbai and Bangalore are the major market for the brand in retail. The brand is planning to introduce the products in ten major cities of the country by the end of this year. The customer segment is the health-conscious consumer between 25-40 years. Awareness about health and the fact that consumers are demanding clean-label products are the prime drivers of demand for On The Run products.

Brand’s innovation highlights: The brand has launched a new concept altogether—seasoned trail mixes. The trail mixes available in the market are just a mix of nuts, fruits and seeds. However, On

The Run trail mixes are seasoned with unusual spice combinations like orange-pepper and Indian masala while keeping up with its “healthy” attribute as well.

Its tea & coffee bites are also an innovation and has been launched for the first time. Coffee bites are usually coffee candies, which are laden with sugar. However, On The Run coffee bites give not just the flavor of real coffee but along with it is power packed with other nutrients as well. On the other hand, its green tea bites can potentially replace the conference room biscuits. On The Run tea bites make for an ideal tea accompaniment as they don’t contain sugar and any other processed ingredients. Moreover, it also has a dash of ginger to please the Indian palate.

Retailing and marketing strategy: On The Run products are currently available in a few Modern Trade store chains such as Foodhall, Nature’s Basket and Nilgiris. On The Run is focusing on increasing its footprint in MT only in the top 4-5 cities for the time being. Going forward, it plans to take the brand to the top 10 cities through a combination of MT, GT, health-tech and food-tech channels.

The brand is into doing a lot of sampling as part of its BTL activity. The focus is on sampling activities at stores and events besides also on giveaways and associating with the relevant TG. Other than BTL, it is using digital social channels to increase the reach of products among the masses.

Future plans and roadmap ahead: After launching its energy bars in March last year and then entering the retail market in August last year, the company has registered 100% growth in the first year of operations and is confident of achieving the same growth rate next year as well.

The brand has a robust supply chain for its current product line. Developing distribution channel is an ongoing task for the brand. It is currently focusing on the five markets that the brand has its presence in and is working on expanding to the top 10 cities in the months ahead.

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Worldwide, many household ingredients like millets, moringa, turmeric, etc, are being labeled as superfoods. On The Run is looking to expand in this niche category and is excited to be in this space.

— **Shilpa Phadke**
Founder, On The Run



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Veizlay soya products are the closest to non-veg food

→ Company and brand profile:

Veizlay Foods Pvt. Ltd.

manufactures innovative soya-based food products and has been in this business for the past 9 years. Formed with the vision of providing nutritious, healthy and delicious vegetarian foods in a hygienic and cost-effective manner, soya foods by Veizlay contain rich proteins and vitamins apart from being delicious to eat. Apart from General and Modern Trade, the company provides its services to the HoReCa industry through its pan-India distribution network.

Over the years, the brand has already won many awards and accolades as a mark of industry recognition for its products. The brand has won the “Golden Book of World Records”, “Asia Book of Records”, and was also awarded by scientists of ICAE-Bhopal.

Product portfolio and best-selling products:

Veizlay has introduced its soya innovation in two different categories – Frozen and Non-frozen. In the non-frozen segment, it has gluten-free soya noodle, soya vegget, soya indi chop, soya chikka, and soya veg-meat with high nutrition value and rich in protein. In the frozen segment, it has varieties of export quality ready-to-eat soya food products: seek kabab, shami kabab, rogan josh, soya chop, veg chicken, soya chikka biryani, soya nuggets, chop sticks, and many more.

Among Veizlay’s best selling products are: seek kabab, shami kabab, soya chop, chop sticks, soya chikka rogan josh,

“



Working couples in metropolitan cities prefer Veizlay’s ready-to-eat soy food products in their regular meal as they are easy to cook and have high nutrition value.

– Amit Bajaj
MD, Veizlay Foods Pvt. Ltd.

Customer segments and key markets:

Veizlay products find placement at almost all leading modern retail chains in Delhi-NCR and northern India. The brand is now expanding to markets in southern India.

Brand’s innovation highlights: The brand has focused its innovation on the concept of health, hygiene, nutrition and taste. In all its products, it has been able to maintain the nutrition value and health factor without any compromise on taste. All Veizlay products are easy to cook, have high nutrition value, and are tagged with attributes such as healthy, preservative-free, high protein, easy to digest, and low fat.

In the past 2-3 years, the company has introduced many innovative soya-based products – vegetarian shawarma, veg chicken, veg-meat and soya lollipops. These products offer one the best alternatives to non-veg food or meat. Its vegetarian shawarma and veg meat are a delight to all food lovers – the taste and fleshy texture of these products are very close to the traditional non-veg food and so these products are widely accepted by vegans, vegetarians and non-vegetarians alike. The brand is also planning to convert its entire range and recipes to vegan to cater to the growing vegan community.

Retailing and marketing strategy:

The brand is expanding its Modern Retail footprint day by day. The brand conducts extensive sampling activity at retail outlets to increase visibility, awareness and consumer engagement for its products. Apart from sampling, it also undertakes promotions through print and electronic media as part of its branding initiative. Veizlay has tie-ups with different logistic partners on a pan-India basis, which has helped it to strengthen its supply chain and distribution.

Roadmap ahead: Veizlay is looking for more expansion in southern India. It has also entered into export and is aiming to grow its business overseas. Going ahead, Veizlay wants to expand globally and establish itself as a multinational brand.

soya samosa, soya nuggets, vegetarian shawarma, soya chikka biryani, soya lollipop, soya noodle, soya vegget, soya chikka, soya veg-meat and soya indi chop.

Brand USP and differentiators: Apart from their looks, texture and mouth-watering taste, Veizlay’s soya products offer high nutritional value, which make them the best alternative to non-veg products and also unique and different from other brands in the same product soya products category. All Veizlay products are customized and developed as per various recipes – vegetarian, vegan, and non-vegetarian – so, these products can be easily mingled with regular meals. Also, the products’ packaging & design are as per international standards in keeping with their export quality.



Happilo gourmet snacks come in innovative flavors

→ Company and brand profile:

Happilo is a gourmet healthy snack brand from Bangalore which makes many natural and organic products. The brand has built its reputation by serving its happy customers with a premium range of gourmet healthy snacking options since 2016. The specialty of the company lies in the innovative flavors of its products, which are manufactured using dry roasted technology and without any added oils.

Product portfolio and best-selling products:

Happilo's wide product range includes nuts, berries, trail mixes, roasted and salted mixes, dried fruit, nut butters, all natural healthy breakfast bars, high protein bars, and innovative flavored seeds in portion size and convenient packs.

Brand USP and differentiators: Gluten-free and zero cholesterol are some of the USPs of Happilo products, which are available in innovative flavors like peri-peri, barbeque, chilly lemon, pink salt, among others. Happilo products enjoy a longer shelf life because the technology used for roasting the products do not use oil and are made with absolute focus on the high quality sourcing of ingredients. Its use of International MAP technology and high barrier laminates technology has helped the brand build a variety of natural and flavored seeds, all of which are tasty and nutritious.

Customer segments and key markets:

The products cater to consumers from every segment and demographic. They have been very well received by the Millennials, especially from the fitness enthusiasts. Taking the market response of its products into consideration, the brand is soon launching its energy and protein bars targeted at the age groups of 15 to 40 years living in Tier I and II cities of India. Earlier, the brand had launched its certified organic seeds range, which was developed after taking into account the health benefits of basil, chia, flax and quinoa seeds, especially for women and the older generation.

Brand's innovation highlights: Happilo products are oven roasted and never fried.

“



As a brand, we are continuously creating newer variants to give our customers the best collection of organic seeds, fusions, trail mixes, roasted nuts, berries, dried fruits, nut butters, etc. We are also constantly working to introduce more varieties and new range of snacking options across categories with focus on health and wellness.

– Vikas D Nahar

Founder, Happilo International Pvt. Ltd.

bars, which will offer an excellent snacking option to all fitness enthusiasts.

Today, with the clean eating becoming stronger, every customer wants to understand the nutritional benefits about the product and want to see sugar and sodium content in every product. In keeping with these consumer trends, Happilo has created a packaging that comes with a clear communication regarding the USPs of the product. The packaging has an easy-to-read information on labels – gluten-free, cholesterol, fiber, protein, carbohydrates content, etc. The products are packed under strict hygienic conditions after proper selection, sorting, processing and cleaning.

Retailing and marketing strategy:

Happilo products are available across general trade, modern trade and all e-commerce platforms. The company believes that modern trade is helping it to expand to newer territories and acquire a fresh consumer base. In modern trade, the brand is growing 100% y-o-y but as a brand it is trying to build a strong presence across all customer touch points in the industry. To increase the customer base for its products, the brand conducts extensive sampling activities across all modern trade and general trade to inducing new trials. It is also incentivizing the end consumers with coupons and other offers to help them lead a healthy lifestyle.

The brand enjoys a strong sales and distribution channel across India and is currently available at more than 20 states across the nation. It is planning to develop cost net freight (CNF) across all the regions of its operations to ensure fast connectivity and to reduce the cost of logistics.

Roadmap ahead: Happilo wants to be a Rs. 100 crore brand in the next 12 months. Its vision is to work together with supply partners, channel partners and stakeholders towards the enrichment of consumer eating habits. Going forward, it believes that developments that promote clean eating, healthy lifestyle and a positive mindset will be the growth drivers in the food category and the brand has a leadership position in this space.



They contain no oil, no added colors, and have no preservative. These innovations have helped the brand build an impressive product range that is steadily increasing to cater to the taste buds of the millennial generation. The brand has developed convenient to carry portion packs at price points of Rs. 30 & Rs. 50 with new inventions in flavors like peri-peri, barbeque, chilly lemon and pink salt. The brand is set to launch its all natural healthy breakfast bars and high protein

Naturedge offers zero sugar drinks with herbal goodness

→ Company and brand profile: Siddhesh Sharma, the founder of Naturedge Beverages Pvt. Ltd. is from the famed Baidyanath Group that enjoys a 100-year-old legacy in the Ayurveda domain. The company has introduced innovative and delicious beverages infused with the goodness of nature in keeping with Naturedge's philosophy "to create genuinely good products with best quality, all-natural ingredients, designed in a format that fits perfectly with our fast-paced life".

Product portfolio: Currently, Naturedge Beverages has two products in the market – Shunya and ARMR. Shunya is a delicious herbal infusion packed with natural antioxidants, super-herbs, vitamins and minerals. It has zero calories, zero sugars, zero artificial sweeteners and preservatives.

ARMR, pronounced as 'armour', is a pre-party herbal shot made with 15 super-herbs and absolutely zero sugar, which helps prevent the worst of hangovers, naturally.

Brand USP and differentiators: Shunya is 100% naturally sweetened – with zero calories, zero sugar and no artificial sweeteners like aspartame and sucralose – the usual go to ingredients for other 'zero sugar' drinks in the market. ARMR, developed at the innovation centre of Baidyanath, keeps after-drinks hangovers at bay. All you have to do is drink a shot of ARMR before your first alcoholic drink. Both Shunya and

ARMR are made only with natural and clean ingredients based on Naturedge's business premise of offering good health along with great tasting beverages available in contemporary packaging.

Customer segments and key markets: Shunya and ARMR have been recently launched, and have panned out well in Delhi-NCR, Mumbai, and Bangalore markets – MT, GT, HORECA and online. The products will be available in all metros and select Tier I cities by end of the year.

Brand's innovation highlights: Shunya is the only drink in the Indian market with zero sugar, which means no added sugar and no fruit sugar. Shunya comes in fizz and non fizz variants and both infusions have been clinically tested to be healthy for diabetic patients and even kids.

With ARMR, Naturedge has created a whole new category – a brand new product in the all natural and herbal anti-hangover segment, which is slowly building up in India. ARMR is an important innovation in the anti hangover product category, available in the form of a herbal shot that is easier to consume and offers an enjoyable experience for the consumers. Packaged in a premium 60 ml shot glass, ARMR is more effective since it is in the form of a drink rather than a pill.

Retailing and marketing strategy: Naturedge has put in place a strong marketing plan to ensure brand awareness across the nation. Having established its brands in north India, it is now looking to focus on west and south to expand its retail footprint.

Naturedge products are currently available in all MT chains in the north and it is gradually listing its products across all leading chains in the country. To strengthen its retail reach, the company is carrying out strong BTL activities designed to place the products at effective point of

“



Its an exciting time to be in the Indian market in the FMCG space. We are growing at a fast pace in the market and constantly investing in R&D to improve the value proposition offered by Naturedge products. We are poised to become the market leaders in our category in the near future.

– Siddhesh Sharma,
Founder & CEO,
Naturedge Beverages Pvt. Ltd.

sale merchandise across all retail channels. Also, it is doing a great job on MT floors by enabling product samplings and information transfer to the consumers.

The company is also going in for heavy use of digital marketing to target its audience effectively and to create a pull demand in the market. It also operates its own warehouses in most big cities in India and is in the process of appointing C&F agents and distributors across the length and breadth of the country. Investing in own warehousing is helping Naturedge to service the market efficiently with fresher products in line.

Roadmap ahead: Naturedge is constantly working on improving its product offerings and will be launching new flavors soon. It is conducting studies in the market to understand the gaps that it can fill and wants to launch best-in-class products to service this gap. It is also working on its distribution currently to become a pan-India brand and is looking to garner a strong market share in the fast growing non-alcoholic beverage market.



ANALYSIS

BIG DATA

IN-STORE TECHNOLOGIES

RETAIL OPERATIONS

SUPPLY CHAIN & LOGISTICS

RETAIL FORMATS

MARKETING & BRANDING

LOCATION STRATEGY

INNOVATION TRACKER

STORE DESIGN

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A Success Story from Daman – Shree Food Corner

From a single 100 sq.ft store in 1973 in Daman to five stores as of date, Shree Food Corner presents an inspiring story of small town success in retail. Their journey offers an object lesson in facing off the early stage challenges – financial and manpower – that every budding entrepreneur and experienced retail companies alike can learn from. Progressive Grocer speaks to the founders to know of their business model and how they have kept the business ticking.

By **Zainab S Kazi**

The story of Shree Food Corner dates back to the early years of 1970s when Ashok Rana and his wife Usha shifted from their ancestral village to a small town in Gujarat – Daman.

Armed with the experience of running a small kirana (local mom and pop store) store in Kalay, they unanimously decided to carry forward with their expertise in this business. With the help from family and a few friends, they opened a 10x10 sq.ft. sized kirana store in Daman.

Back then, the store was called Mahalaxmi Traders. Recounting their yesteryears' experience, which laid the foundation for Shree Food Corner, Ashok Rana says: "With literally no money and surrounded by the perils of setting foot in a new place, we encountered many struggles initially. But with the help from our family who agreed to lend us some money, we purchased a parcel of land in

the main market and built our home and shop on it. With the shop set up, I quickly learned the nuances of running a kirana store in Daman by meeting with the suppliers in the town. Back then, the supply chain linkage was weak and we had to travel to Mumbai often to get our stocks."

Supporting Ashok Rana was his wife Usha Rana who still plays an active role in running the business. Since 2012, their son Harsh Rana too has joined the family business supported by his wife who joined in 2016.

The Expansion Timeline

Year	Store	Location
1973	1st store	Daman
2013	2nd store	Daman
2014	3rd store	Vapi
2015	4th store	Umergaon
2019	5th store	Pardi



Turning Point

From a 10x10 sq.ft. store in 1973 to a complete self-service store in 1990s and having a computerized billing system in early 2000, Shree Food Corner has not only kept pace with the changing dynamics of retailing but has been a step ahead as well, with a sharp focus on the location of their stores. Usha Rana explains, “We started with a small store and by the early ‘90s, we had a 1,000 sq.ft. self-service shop. All of this was done purely with an aim to serve our customers better. We introduced trolleys and computers in the year 2000. I can state with pride that we were the first store in Daman to introduce the concept of shopping trolleys and baskets along with computerized billing and barcode systems for recording purchases and sales. I remember retailers visiting our stores from adjacent areas just to understand the systems.”

The driving force, of course, was their commitment to customer service. The drive to excel in customer service would have Ashok Rana traveling often to Mumbai to pick up products and goods not easily available in and around Daman and fill in suitcases and travel back with them to Daman. He would also keep a keen eye on any new retail developments happening in Mumbai and try and adopt those at his store.

Talking about the turning point in their business, Ashok Rana says: “In 2013, we were fortunate to come in contact with industry veteran S.C. Misra who introduced us to Sanjay Modi, the scion of Surat’s Dhiraj Sons. With their intervention and insights, we were able to take a leap and multiply our business several times over.”



“We do actively seek for product promotion and brand partnership from the companies but it is very unfortunate that since we are in a small town in Daman, these companies do not show special interest.”

— Ashok Rana

SHREE FOOD CORNER: FACT BOX

Name of the company:
Shree Food Corner Super Market

Name of the company's owner/promoter:
Ashok T. Rana

Year of launch of first store: **1973**

City/ies where stores are in operation:
Moti Daman/ Nani Daman/ Chala/ Umargam/ Pardi

Number of stores in operation currently: **5**

Total retail trading area currently:
17,500 sq.ft.

Major Product categories & Merchandise Mix: **Food; Footwear; Accessories; Imitation Jewellery;**

SKUs per store: **4,000**

Average monthly sales: **Rs. 2.25 crore**

Average bill size: **Rs. 650**

Number of Employees: **150**

Their meeting with Misra happened thanks to their good relationship with their suppliers. As the story goes, an executive from Nestle suggested they meet Misra to help them expand and revolutionize their retail operations. “The first thing Misraji recommended was to change our software. He introduced us to the software most relevant to us and, thanks to him, we started using ERP for our inventory management,” shares Ashok Rana.

Customer Centric Initiatives

Among other things, the most prominent customer retention initiatives they took was to put in place an attractive scheme – one month of free purchase on purchase of 12 months from their store with assured gifts on different slabs of purchase volume, discounts on daily-use goods/ products and the Sunday Dhamaal offer with goods being sold under heavy discounts across categories – food grains, spices, dry fruits, footwear, etc.

On the topic of customer service initiatives, Usha Rana reveals the key ones that have helped them win customer patronage over the years. “Our staff at the stores maintains a healthy relationship with our customers. Most of our customers visit our store 3 to 4 times a month. We create a hospitable environment by remembering their names, playing

Leading FMCG Brands at Shree Food Corner

Hindustan Unilever
Patanjali
Procter and Gamble
Reckitt Benckiser
ITC
Nestle



We offer home delivery before the end of the day, providing a one-stop shop solution for our customer where besides food and grocery, they can also shop for footwear, jewellery, etc.

— Usha Rana



with their children so that they can shop at peace. We have a play area, especially for children at our stores. Our store staff is always on its toes to help any customer in case of any confusion. In addition to this, we offer home delivery before the end of the day, providing a one-stop shop solution for our customer where besides food and grocery, they can also shop for footwear, jewellery, etc. We also stock seasonal products like fire crackers, kites, Christmas decoration and traditional sweets.”

All of the stores have the data of their loyal customers and based on various festivals and other occasions, customized offers are given to them, which help them retain their patronage.

Taking Care of Subtle Nuances

With an attrition rate of about 8-10 per cent, Shree Food Corner is home to a happy team. To keep their staff motivated, the Ranans conduct in-house

soft skill training programs. Usha Rana shares, “Harsh is associated as Leadership Facilitator with an American organization and his inputs have been of immense help for keeping our staff motivated at work.”

To ensure that due attention is given to all popular categories, Harsh Rana points out, “Though it is the day and age of ready-to-eat meals, it isn’t surprising that we still crave for food grains and spices based on the culture and region we belong to. I strongly feel that it is upon the super/hypermarkets to provide these to their customers. Instead of only thinking about how best modern foods can be included in the category mix, we need to pay attention to the stocking of food grains and spices as per the demand and season.” At Shree Food Corner, the sale of their in-house packaged food grains, spices, dry fruits and snacks is close to 70 per cent as compared to that of branded food items.

→ RETAILING INITIATIVES

Effective Technology Adoption: Since 2013, the ERP has been put to use for inventory management and it spans across all the five stores.

Supply Chain Management: There are two central warehouses in Daman. It is from here that stock is supplied to all the five stores. No store has the authority to be in direct touch with the suppliers / vendors. There is centralized supply chain management in place. This system helps take care of the shrinkages and pilferages, apart from ensuring better deals with the suppliers / brands.

Marketing & Promotions: Using the database of their customers, various offers and promotions are designed keeping the upcoming festivities in mind.

Building Brand Partnership

With an increase in competition in FMCG brands, each one needs to ensure that their visibility at the super/ hypermarkets is not compromised. One of the most prominent ways in which they do this is by associating with the super/hypermarket for various marketing and promotion initiatives. Though, according to the Ranans, a majority of the FMCG brands are yet to realize the power of small towns and cities. Ashok Rana shares, “We do actively seek for product promotion and brand partnership programs from the companies but it is very unfortunate that since we are in a small town in Daman, these companies do not show special interest. We are a chain of 5 stores in Daman and Gujarat but I believe the marketing teams of these companies face a communication challenge when it comes to executing their offers and promotions in rural/ small towns. **PG**



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Optimizing customer digital experiences with AI

With the advent of AI, brands have gathered a deeper understanding of customers. As AI deals with semantic meaning, meta-level knowledge, and answers which are either exact or optimal, it can easily come up with personalized interactions based on the preference of each customer. AI is able to decipher tendencies and predict future customer needs or create excellent recommendation engines.

By Abhishek Mahajan

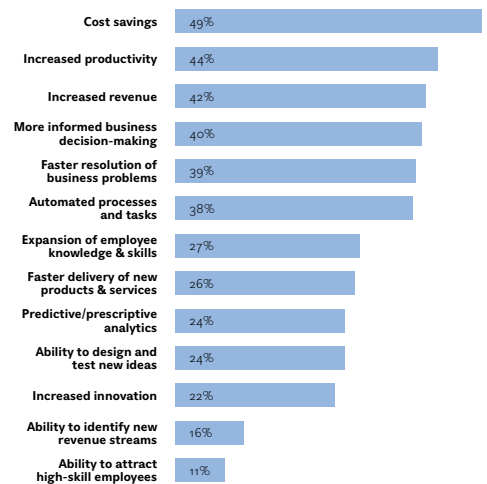
Artificial Intelligence (AI) has had a huge impact on the retail industry. In fact, Gartner predicts that by 2020, 85% of our interactions will be with chatbots. To put it differently, AI is deemed to change a lot. Human workforce will be no more at the forefront of customer interactions, and marketing calls will rely mostly on hard data instead of individual ideas. In fact, a study reveals that AI will increase business output by 6.5 times. Now the question is with this technology in flux and advancing into mainstream how AI will influence everyday customer experiences

Ways to Optimize Customer Digital Experiences with AI

With the use of AI that promises to deliver relevant retail experience seamlessly across devices. In fact, a survey among US customers said that 83% of shoppers are happy to shop from a brand that uses chatbot or some other AI competences.

Let us now have a quick look at how AI optimizes customer digital experiences.

Benefits of artificial intelligence (AI) for retail business worldwide in 2018



Source: <https://rubygarage.org/blog/11-use-cases-of-ai-in-retail>

Tailored content to suit customer needs

There is no denying the fact that personalization plays a key role in meting out positive customer experience and brands are looking out for different ways so that they can make every point of the customer journey more personalized.

However, with rising complexity of products and services, sometimes it becomes challenging to keep the content relevant. This is where AI has a major role to play. AI enables creation of tailor-made content for a specific customer base. Deep-learning models can take cue from common words and phrases that customers look for and in turn can come up with tactful recommendations.

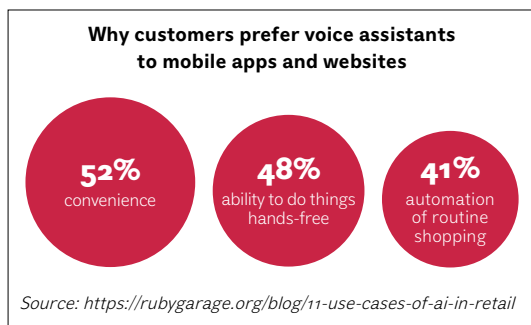
Let us have a look at an example, when a customer submits a support ticket, he keys in the words, “change my password,” in such instance AI will recommend apt editorial adjustments to relevant help articles. Nevertheless, having an understanding of customers search terms, the content can be adjusted accordingly so that target users easily interpret the content. In this case, AI helps support organizations have deeper understanding of customers’ issues and they can come up with more personalized content.

Voice-based Commerce

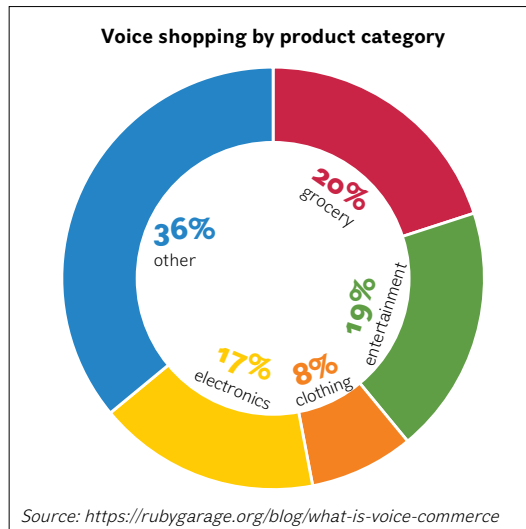
AI powered voice-based product search and voice commerce has made shopping a delightful experience for shoppers today. Customers need not type their queries in small devices they can just ask Alexa to add carrots or the new lipstick that is launched by MAC to their shopping cart. Also customers can ask smart assistants about the present delivery status, estimated arrival time, or reorder all their previously added items. Brands like Target, Tesco, Walmart, Kohl and Costco either use Google or Amazon AI technologies for an enhanced shopping experience.

In fact, rising Voice commerce has made purchases faster and easier.

The chart below represents why customers opt more for voice based assistants



The pie chart below shows Voice shopping by product category



With ML and AI, browsing for hours in search of the perfect product will be long gone. Rather brands will offer ultra-personalized recommendations so that the customer can easily choose the product.

Virtual Fitting Rooms and Mirrors

The AI-powered virtual fitting rooms and mirrors have brought in huge impact into the retail industry. The technology seems great for busy shoppers because they can try out multiple apparel and matching accessories within a matter of seconds.

Brands like Moda Polso allow clients to create their own avatars. The virtual avatars allow Moda Polso shoppers try out numerous outfits so that they can quickly accomplish the purchase. In fact, virtual



dressing rooms have been a great boon for online shoppers because online shoppers return around 25% of the clothes that they buy and in 70% of the cases the reason is wrong size.

Combination of IOT and AI

A Report by Global Market Insights says that Internet of Things (IoT) in the retail market will reach to over \$30 million by 2024. In fact, IoT has dramatically enhanced customer experiences by enabling retailers with business insights so that they can advance their marketing strategies. It does so by deriving utmost benefit from the world of AI. It is AI that gains helpful insights from the sheer volume of data that is brought to table by IoT through connected devices and sensors. The good thing about combining IoT with AI is that both brands and customers benefit from the technology unequivocally. For instance, when a customer chooses a drink from a retail shelf, IoT and AI will work together to come up with a food suggestion that would go well with the drink and also where to find the ingredients within the store. The result is customers have an improved shopping experience and brands get a chance to cross sell their products.

AI powered voice-based product search and voice commerce has made shopping a delightful experience for shoppers today.

Improved customer journey with AI and ML

AI enables brands to have a deeper learning about customers. As AI deals with semantic meaning, meta-level knowledge, and answers which are either exact or optimal, it can easily come up with personalized interactions based on the preference of each customer. AI is able to decipher tendencies and predict future customer needs or create excellent recommendation engines. Brands like Sephora, France-based chain of

beauty stores, and Black Diamond,



a manufacturer of equipment for skiing and climbing are successfully using AI to offer personalized recommendations to clients. Machine Learning (ML) on the other hand defines customer personas more precisely; in fact with ML customer pattern recognition becomes easier. Combined together, AI and ML can scale new heights in the retail industry.

With ML and AI, browsing for hours in search of the perfect product will be long gone. Rather brands will offer ultra-personalized recommendations so that the customer can easily choose the product. Last but not the least, the time has come when companies will not only take care of the need of the customers rather will work ahead of time so that they can decode customer requirements, preferences, moods, desires, and also the kind of problems that customers might face. The concept of retail customer engagement will increase in leaps and bounds. **PG**



The writer is Sr. Manager – Retail, Aspire Systems, a global technology services firm offering services with expertise in Product Engineering, Enterprise Solutions, Independent Testing Services and IT Infrastructure Support services.

THE INDIA FOOD REPORT 2018-19

Sizing > Sectors > Key Players > Opportunities > Challenges > Future

INDIA FOOD REPORT 2018 IS THE MOST AUTHORITATIVE GUIDE TO FOOD RETAIL MARKET IN INDIA

The Report has been compiled with inputs from some of the world's most respected consulting and/or market study organizations, retail business heads, brand analysts and consumer research companies, among others. It offers extensive mapping, sizing of the food manufacturing, marketing and retailing sectors, benchmark figures on consumer spends and retail market size across key food categories and segments, opportunities for business and growth in key areas of Food Retail, along with observations by industry experts on key consumption trends, new concepts in F&G, FMCG, and F&B.

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what's next



◀ Storia Foods & Beverages launches a range of natural shakes

With a surge in demand for healthier beverages, Storia Foods & Beverages has come out with a range of natural shakes with a refreshing twist to them. The fruit shakes are rich, creamy and frothy, which make them perfect for refreshment. Convenient to store and carry, the shakes are available in 9 lip-smacking flavors, are trans-fat free, have no preservatives, and contain natural fruits and ingredients. They are shelf stable for 6 months, without refrigeration, and use Aseptic PET technology, which helps to reduce nutritional losses and retain most of the flavors and fragrances from its natural ingredients.

The shakes have a balanced calorie count, which makes them a guilt-free palate cleanser. Storia has also curated India's first elaichi chai shake, perfectly portioned to satiate the taste buds of the Indian consumer. By offering the health benefits associated with natural fruits and ingredients, at an attractive price, the company is offering a healthier alternative to flavored milk. Storia Shakes are available at all leading supermarkets and retail stores as well as on e-commerce sites and come at an attractive price range of Rs. 30 & Rs. 25.

Storia's portfolio comprises ready-to-drink Shakes, 100% Natural Coconut Water, Beverage Whitener and Street Style Drinks. An experienced team of FMCG professionals has increased Storia's presence across 33+ cities in India at 50,000+ retail outlets.

▼ Cornitos launches "Do It Yourself" taco shells for creative foodies

Greendot Health Foods Pvt. Ltd. has introduced "Do It Yourself" range of traditional Mexican Taco shells in two sizes – 4 inch cocktail size and standard 6 inches with each pack containing 12 shell pieces. Taco shells are ideal for any party or as an evening snack and they can be used for making a Mexican snack with a variety of tasty fillings. With Cornitos Taco shells, the brand is trying to further penetrate in the younger market segment that is moving towards a healthy and active lifestyle.

Cornitos Taco shells are gluten free, hard corn tortillas made from non-GMO corn. They are fully cooked in corn oil and are ready to eat. Cornitos Taco shells are packed securely to avoid breakage and in the pack are two Taco boats for easy serving. The nitrogen-flushed packaging also adds to the 'extra freshness' of the product. Each pack has a Taco Recipe at the back to help the consumer create their own personalized savory. Taco Shell 4 inches pack is priced Rs. 110 (80 gm) & Taco Shell 6 inches pack comes for Rs. 160 (190 gm). The product is available at all leading Retail, E-Retail and Modern Trade stores.



▼ Get-A-Whey launches protein enriched, no-added sugar ice-cream

Healthy ice cream brand Get-A-Whey has introduced premium ice creams that are not only tasty and healthy but also have whey protein added to them, which make these ice-creams high in protein without any added sugar.

Power packed with 10-14 gm of protein per 100 gm serving and with just 7 gm of fat per 100 gm serving, these ice-creams are deliciously tastier without compromising on health whatsoever.

Get-A-Whey developed this concept in 2018 in a kitchen in Mumbai after noticing that people were digging into so called 'healthy snacks' that were high in sugar without any good sources of protein.

Get-A-Whey is available in 9 flavors – Belgian chocolate, strawberry & banana, French vanilla, coffee roasted almond, peanut butter crunch, chocolate brownie fudge, keto Belgian chocolate, and keto very berry. Get-A-Whey ice-creams retail out of 50+ stores in Mumbai – the likes of Godrej Nature's Basket, Society Stores, Noble Plus, and many more – and also available through online delivery by Swiggy and UberEats. The ice-creams sell in more than 10 cities in India currently with Get-A-Whey continuing to expand its brand presence.



► **Tasty Treat introduces Swedish inspired ‘Thin Cookies’**



Tasty Treat, the munching brand by Future Consumer Limited, has added another product to its range of cookies and biscuits. People with a sweet tooth can now enjoy Swedish inspired ‘Thin Cookies’ introduced by Tasty Treat for the first time in India. Tasty Treat Thin Cookies are baked with recipes from the Sweden kitchen. These delectable cookies are thin and crisp, making them an all-time favorite snack that can be had as a dessert or paired with a cup of tea.

Tasty Treat Thin Cookies are freshly baked crunchy cookies that are designed in a cute flower shape. The cookies are incredibly light and prepared with the exact amount of sweetness and natural flavors. The flavors are distinctive from other cookies and are available in ginger, chocolate and coconut, in packs of 75 gm at just Rs. 30. Tasty Treat Thin Cookies and other munching products from Future Consumer Limited can be purchased from your nearest Big Bazaar, Big Bazaar GEN NXT, Easyday Club, Heritage, and Aadhar stores in the country.

▼ **Iceland Foods launches new potato snacks and authentic Italian pizzas**

Iceland Foods India Pvt. Ltd., innovative entrant in the frozen foods space, has further expanded its range in the Indian market by launching new potato snacks and authentic Italian pizzas. Iceland has launched three new premium hand-stretched and stone-baked authentic Italian pizzas – tomato & basil pesto, spinach & goat cheese, truffle and mushroom. These variants will further strengthen Iceland’s pizza range and provide an unmatched product experience to the Indian consumers. These dry roasted healthy snacking options from Iceland Foods are available at a price point of Rs. 385 and Rs. 450 respectively for 315 gms and 385 gms.



► **Marico’s Coco Soul introduces 100% natural infused oil variants**

With consumers increasingly opting for healthier food options that are 100% organic, natural and farm fresh, Marico’s range of cold pressed virgin coconut oils under the brand name Coco Soul has now introduced three new infusion oils – chilli-oregano, curry-coriander, and cinnamon. The new range, curated and conceptualized by chef Kunal Kapur, is targeted at those who wish to indulge gourmet foods, yet maintain a healthy lifestyle.

Chilli oregano is infused with the natural extracts of hot chilli and delectable oregano, which acts as a perfect partner to your salads and pastas. The cinnamon infused oil is similarly infused with the natural extract of cinnamon and can be used in baking or as a top-up on shakes and smoothies. Infused with the natural extracts of curry leaves and coriander, the curry coriander oils are best used to cook Indian dishes for an earthy aroma and palatable taste.

The variants are priced at Rs. 349 for a 250 ml bottle. One can purchase the products at leading retail stores such as Godrej Nature’s Basket and TESCO across Mumbai, Pune, Delhi NCR, Bangalore, Hyderabad and Chennai as well as online on Amazon and Flipkart.



▲ **Kwaliti introduces ‘quick snack’ in combi pack range**

To help you enjoy your breakfast or snacks on-the-go, Pagariya Food Products’ Kwaliti brand has launched its Combi Pack range. Positioned as a quick snack and targeted at kids and young adults, the combi pack range is the brand’s latest innovation in its breakfast cereal category. There are 7 small bowl packs in the combi pack range, which is available in 4 different variants – choco flakes, choco fills, strawberry fills, and fruit ring. With a variety of top flavors on offer, Kwaliti combi pack holds special appeal for kids, teenagers and young adults alike. The MRP of a combi pack is Rs. 60 and the product is available at leading retail outlets and online marketplaces.

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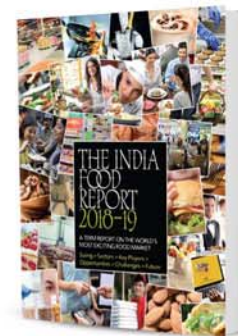
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The Report has inputs from some of the world's most respected consulting and/or market study organizations, retail business heads, brand analysts and consumer research companies, among others. It offers extensive mapping, sizing of the food manufacturing, marketing and retailing sectors, benchmark figures on consumer spends and retail market size across key food categories and segments, opportunities for business and growth in key areas of Food Retail, along with observations by industry experts on key consumption trends, new concepts in F&G, FMCG, and F&B.



HIGHLIGHTS OF THE NEXT THREE ISSUES

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 offer value-added products 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.

NOVEMBER 2019 PROCESSED FOODS: Accelerated lifestyles of urban consumers and their relatively high levels of hygiene awareness are key factors in the growing demand for processed food over unpackaged alternatives.

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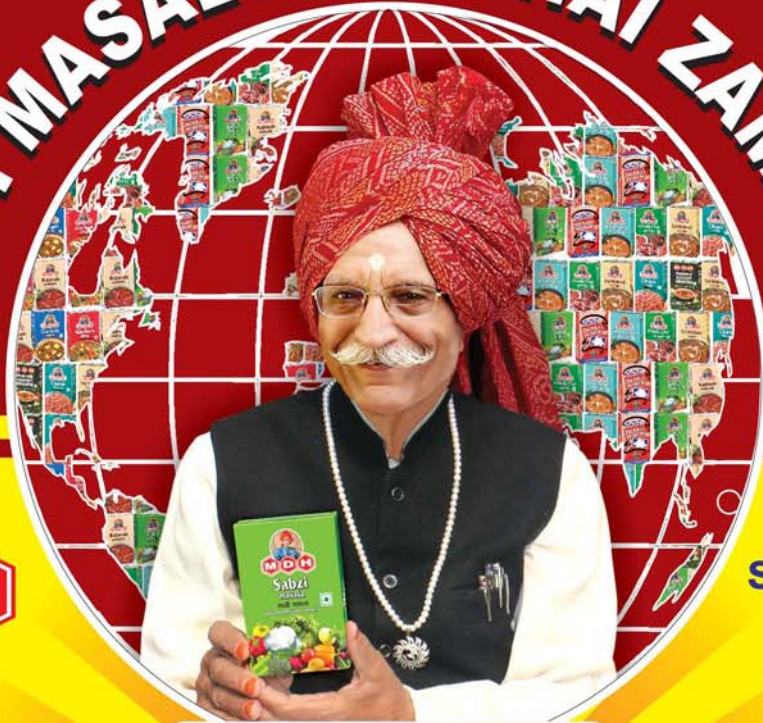
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