

Ahead of What's Next

Progressive GROCER

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FOOD TECHNOLOGY

Gene Editing Meets
Supermarket Shelves

STORE DESIGN OF THE FUTURE

Seven experts weigh in on
how retail experiences will
change

MINTEL SURVEY

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Indian Consumers Have
Eaten Healthy Biscuits In
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PUBLISHER: **S P Taneja**

EDITORIAL

EDITOR IN CHARGE: **Surabhi Khosla**
ASSISTANT EDITORS:
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CREATIVES

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DY. ART DIRECTOR: **Deepak Verma**

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SUPPORT

SR. GM ADMINISTRATION: **Rajeev Mehandru**

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BUSINESS HEAD & ASSOCIATE PUBLISHER: **Lokesh Arora**
E: lokesharora@imagesgroup.in, M: +91 9999033612

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CONSUMER CONNECT & SUBSCRIPTION

DEPUTY MANAGER: **Priti Kapil**

E: pridikapil@imagesgroup.in

GROCERY GROUP PUBLISHER: **John Schrei**
GROCERY GROUP EDITORIAL DIRECTOR: **Mike Troy**
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Food & Grocery Retail is poised for a bright future. According to industry veteran Sanjiv Goenka, Chairman, Spencer's Retail, the Indian online grocery market could exceed sales of US \$3 Billion (about Rs 22,500 crore) in 2020, a substantial 76 per cent jump over the previous year.

But while the pandemic has opened the floodgates of opportunity, it has also altered consumer behavior radically. The focus on health and hygiene has intensified and consumers are turning to e-commerce for their grocery and essentials needs. Moreover, like in other retail segments, a growing preference towards Omnichannel shopping experiences has also been noted among modern consumers, ushering in a new normal for food retail that may become permanent.

In this issue of Progressive Grocer, we outline how Spencer's is about to change the Indian grocery retail landscape as an early adopter of the Omnichannel model. The feature also reveals the strategies that the retail icon is banking on as well as insights on how it is working towards initiating innovative, out-of-store efforts to ensure customer experience.

Apart from this, the issue also covers a comprehensive update of the grocery segment in India along with in-depth features on food technology, sustainable packing and the growing opportunities in the healthy biscuits segment.

As always, we hope you find the issue informative and useful. Log on to our website <https://www.indiaretailing.com/category/food/food-grocery/> for more features, analysis and expert opinions.

Amitabh Taneja
Editor-in-Chief

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“Our Focus is to be an Omnichannel Retailer,” Shashwat Goenka, Sector Head (FMCG & Retail) at RP-Sanjiv Goenka Group, talks about the journey of his brand and how it has won over customers in times wrought with fear of contagion.

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FMCG Sales in June at Pre-COVID-19 Levels Helped By Rural, Traditional Channels: Nielsen

The Indian industry has a delayed recovery in comparison to other countries, but the FMCG sector has touched pre-COVID-19 level sales in June primarily helped by a rebound in rural consumption and sales from traditional channels, said data analytics firm Nielsen. According to Nielsen, both urban and rural sales are growing but the recovery/ sales from the undeveloped semi-urban/ rural quarters are much faster and traditional trade channels as neighbourhood and Kirana stores have scored over modern trade outlets as retail outlets and hypermarkets.

Compared with other global markets such as China, Malaysia, Indonesia and Thailand, the industry in India has witnessed a delayed growth recovery due to extended lockdowns, said Prasun Basu, President – South Asia, Nielsen.

“Though it has taken three months, we are kind of coming back to the levels, which we had left behind at the end of last year and the beginning of this year Q1 period. If that was 100 in the index, then today we are at 98, which is almost recovered. Good news is that it is a clear recovery but a slowish recovery,” said Basu.

The FMCG industry had a sharp decline in April. It started recovering in May (25 percent decline) and in June, it returned almost to pre-COVID-19 level, said the Nielsen report.

According to Nielsen Global Connect West Market Leader – South Asia Sameer Shukla, the growth recovery is led by rural and traditional channels.

Hygiene segments including products as toilet soaps, liquid toilet soaps and floor cleaners continue to be in the priority list of the shopper under the new normal post-COVID-19.



JioMart Launches Mobile App

Reliance-owned online grocery delivery service JioMart has launched its app for both Android and iOS users. In addition to the app launch, JioMart is now providing free delivery on all orders. Earlier, only orders worth Rs 750 and above were eligible for free delivery.

The roll-out of JioMart apps comes shortly after RIL Chairman and Managing Director Mukesh Ambani announced the availability of the platform in beta mode in 200 cities across the country. He further said that JioMart was handling a total of 2,50,000 transactions every day since the beginning of the pilot programme.

Ambani said that JioMart and WhatsApp will be working closely to create “growth and opportunities” for small merchants and kirana shops.

ITC's Profit After Tax Falls 25 pc to Rs 2,567.07 Crore in Q1

Diversified group ITC Ltd reported a 25 percent decline in consolidated profit after tax at Rs 2,567.07 crore for the first quarter ended June 30 amid challenges of the coronavirus pandemic. The company had posted a consolidated profit after tax of Rs 3,436.51 crore in the corresponding quarter of the previous financial year, ITC Ltd said in a regulatory filing.

Its consolidated revenue from operations stood at Rs 10,478.46 crore in April-June 2020, down 17 percent as compared with Rs 12,657.90 crore in the year-ago period, it said. The company said its cigarettes business clocked a revenue of Rs 4,330.05 crore



in the first quarter, against Rs 6,141.92 crore a year ago. Other FMCG segment revenue stood at Rs 3,378.84 crore as compared with Rs 3,068.07 crore a year ago, it added.

ITC said its agri business had a revenue of Rs 3,764.56 crore in the first quarter, up from Rs 3,622.40 crore a year ago. Paperboards, paper and packaging vertical had a revenue of Rs 1,026.44 crore as compared to Rs 1,527.53 crore in the year-ago quarter, ITC said.

Flipkart Acquires Walmart India, to Launch Flipkart Wholesale for B2B Segment in Aug

Flipkart announced the acquisition of Walmart India for an undisclosed amount and said it will launch 'Flipkart Wholesale' next month, as the homegrown e-commerce major looks to tap into the US\$ 650 billion B2B retail market in India. Walmart India runs 28 Best Price wholesale stores in the country.



The announcement comes a week after Flipkart had said it had raised US\$ 1.2 billion in funding from a Walmart-led investor group. In 2018, Walmart Inc had invested US\$ 16 billion for acquiring 77 percent stake in the group.

Flipkart Wholesale is a new digital marketplace focusing on addressing the business-to-business (B2B) segment in India. The acquisition will help strengthen the capabilities to address the requirements of kirana and MSMEs, he said.



MaxWholesale to Offer Essential Mobile Accessories for Kirana Stores and Their Customers

MaxWholesale, leading B2B e-commerce platform, has partnered with UltraProlink, a front-running electronics brand that offers top-quality mobile accessories. Through this partnership, MaxWholesale aims to expand the assortment of product categories that its partner Kirana stores offer their customers, while also strengthening its own value proposition.

The COVID-19 pandemic and consequent lockdowns have caused numerous mobile stores to remain shut. On the other hand, since citizens are staying home and relying on their personal electronics for work/entertainment, the need for accessories is increasing by the day. With its latest partnership with UltraProlink, MaxWholesale is poised to bridge this gap and empower Kirana stores to provide these essential items to their customers.

Through MaxWholesale, UltraProlink's products will be initially available in Delhi and Gurugram with plans to reach more cities in the near future.

HUL Logs 7 pc Rise in Net Profit at Rs 1,881 Crore

FMCG major Hindustan Unilever (HUL) on Tuesday reported a 7 percent growth in standalone net profit for the first quarter (April-June) of FY21 at Rs 1,881 crore. During the corresponding period of the previous fiscal, the company had reported a standalone net profit of Rs 1,755 crore. The company, in a regulatory filing, reported a 4.43 percent rise in total income during the period under review to Rs 10,716 crore. "In a challenging context of COVID-19

disrupting markets and operations, HUL has delivered a resilient performance with turnover growth of 4 percent and profit after tax and before



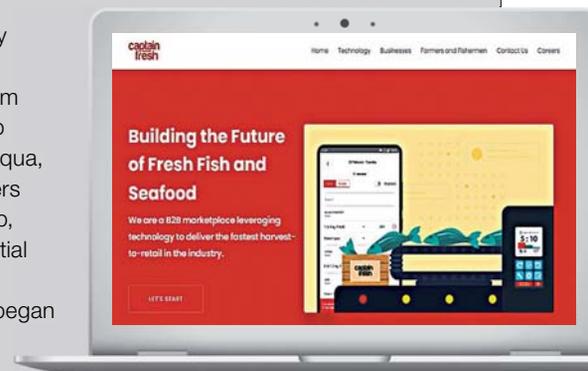
exceptional items growing 7 percent," it said. Sanjiv Mehta, Chairman and Managing Director, said, "While constraints continue due to restrictions in several parts of the country and the near-term demand outlook remains uncertain, we remain well positioned to drive competitive, profitable and responsible growth. The long-term structural opportunity of FMCG in India also remains intact."

Captain Fresh Raises US\$ 2.3 Million in Pre-Series A Funding

Freshwater fish and seafood supply chain platform Captain Fresh has raised \$2.3 million in a pre-series A round of funding led by Ankur Capital with participation from Incubate Fund India and Silicon Valley based angel investors.

The fundraise will be used to invest in technologies like computer vision, IoT, bots, data analytics to digitize and drive efficiencies across the supply chain. Additionally, it will expand to new cities and add key hires to build a mission driven world-class team.

The company received seed investments from Nekkanti Group and Sandhya Aqua, leading exporters of frozen shrimp, who saw potential in the domestic opportunity. It began operations in Bengaluru, currently serving more than 120 retail businesses across all formats. Since then, it has expanded its operations to other cities.





Almost Two-Thirds of Indian Consumers Have Eaten Healthy Biscuits In The Last 6 Months: Mintel Survey

MINTEL RESEARCH HIGHLIGHTS THAT 83 PERCENT OF GEN Z CONSUMERS HAVE EATEN THESE BISCUITS IN THE PAST SIX MONTHS, COMPARED TO JUST 59 PERCENT OF CONSUMERS AGED 55+

A

recent survey conducted by Mintel, the world's leading global market intelligence agency revealed that almost two-thirds (63 percent) of Indian consumers have eaten healthy biscuits such as multigrain,

high-fibre, light and low/no sugar varieties in the last six months.

Even before the pandemic, the research highlighted that almost one-third (30 percent) of consumers said they find biscuits/ cookies that improve immunity to be appealing. This number goes up to 41 percent for consumers in the South and 35 percent among consumers aged 25-34 across India. Other health related biscuit features that appeal to Indian consumers are energy-boosting (36 percent) and balanced nutrition (33 percent).



“Our Focus is to be an Omnichannel Retailer,” says Shashwat Goenka

**Sector Head (FMCG & Retail),
RP-Sanjiv Goenka Group**

SPENCER'S, INDIA'S FIRST HYPERMARKET, AIMS TO TRANSFORM INTO AN OMNICHANNEL RETAILER WHICH CAN CATER TO EVOLVING CUSTOMER REQUIREMENTS AND ALSO BE INNOVATIVE AND AGILE ENOUGH TO RESPOND TO CUSTOMERS IN A TIMELY FASHION...

By Charu Lamba



Spencer's, the oldest modern retail brand in India, is the pioneer in hypermarkets in India, having introduced the first one in 2001. The brand, which owes its success to its customer-centric approach, has not failed shoppers even during the pandemic. Amidst a global health crisis, Spencer's worked towards initiating innovative, out-of-store efforts to ensure customer safety and convenience.

Going forward, the brand aims to transform into an omnichannel retailer which can cater to evolving customer requirements and also be innovative and agile enough to respond to customers in a timely fashion.

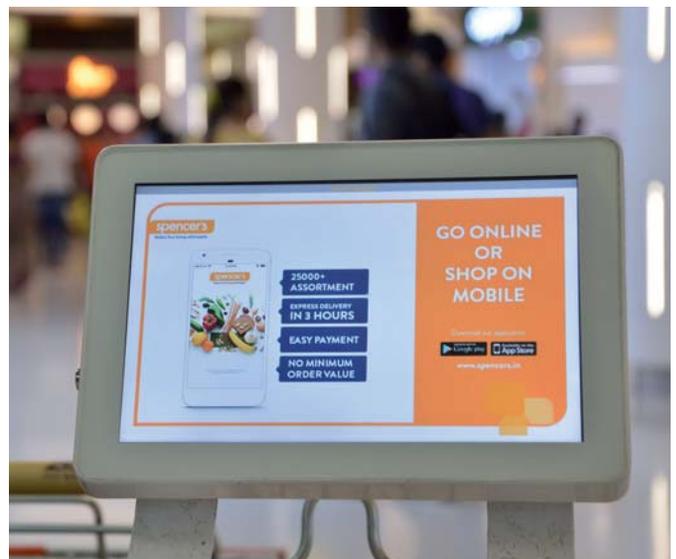
In an interaction with Progressive Grocer, Shashwat Goenka, Sector Head (FMCG & Retail) at RP-Sanjiv Goenka Group, talks about the journey of his brand and how it has won over customers in times wrought with fear of contagion.

Excerpts from the Interview:

The first ever hypermarket in India was launched by Spencer's. It is a pioneer in its own way. What are the other milestones that the brand has achieved?

In 1980, Spencer's launched the first supermarket in India. In 2001 the first hypermarket was opened and after that it has always been an ongoing legacy for us. For example, in 2007, we launched the first hypermarket in Durgapur, Lucknow and Vijaywada.

In 1980, Spencer's launched the first supermarket in India. In 2001 the first hypermarket was opened and after that it has always been an ongoing legacy for us. For example, in 2007, we launched the first hypermarket in Durgapur, Lucknow and Vijaywada.



We also pioneered app-based grocery ordering in the year 2015, becoming India's first omnichannel retailer in the true sense.

What is the major customer value proposition of Spencer's?

Spencer's is known for its wide range of assortment, trusted quality, and strong focus on differentiated offerings in food and non-food alike.

Our company's target customer base is upwardly mobile SECs as well as the more evolved consumers with a primary focus on literate women who are looking for a wide variety of choice at competitive prices during their shopping.

We are also a one-stop retail destination for different categories such as fresh produce (fruits, vegetables, fish, meat), bakery and staples with a keen focus on promotion-driven products in FMCG.

We also have a strong presence in providing experiential retail in gourmet food, imported food, uniquely sourced items as well as wine and liquor.



Gene Editing Meets Supermarket Shelves

WITH SCIENCE AND TECHNOLOGY COMES THE POTENTIAL FOR A WEALTH OF INNOVATION.

By Abby Kleckler

Gene editing has the ability to drive novel varieties into produce departments and kids' lunchboxes.



M

any customers want to eat better, and CPG companies are constantly introducing new products to align with every new fad and trend out there, from keto to super carb and everything in between.

Two statistics, however, are stunning: Just one in 10 adults meets the federal fruit or vegetable recommendations, according to the Centers for Disease Control and Preven-

tion, and the human population is expected to hit 10 billion by 2050, creating challenges of how to sustainably feed this many people.

Several companies are working on gene-edited foods — manipulating the genetic material of plants in a way that could happen naturally — to help solve some of these challenges. Although they're not on supermarket shelves yet, the potential of gene-edited foods in the next couple of years is huge.

Durham, N.C.-based Pairwise is working on specialty crops such as berries, stone fruits and leafy greens to make them more snackable, removing seeds and pits, and tastier, eliminating the bitter or pungent flavor of some vegetables.



Key Takeaways

- ▶ As a solution to the issues of getting people to eat more nutritiously and of feeding a rapidly expanding population, the potential of gene-edited foods in the next couple of years is huge.
- ▶ Companies like Pairwise and Amfora hope that their gene-editing work will bring greater diversity to supermarket shelves, making produce better-tasting and more accessible, and creating protein-enriched soy that's less expensive to process.
- ▶ Beyond the advantages to consumers, gene-edited foods offer benefits to the greater supply chain, and the planet as a whole.

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OCTOBER 2020 HEALTH & WELLNESS: The COVID-19 pandemic is even changing the way we eat. As healthy food takes precedence in consumer's preference, the segment is witnessing rapid growth. We chalk out the market dynamics and the opportunities.

NOVEMBER 2020 NEW YEAR SPECIAL: Every new year brings new trends as well as opportunities and challenges for retailers across the world. This issue will help grocers keep tabs on emerging trends of 2021 and help them stay ahead of the competition.

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South India

Suvir Jaggi | suvirjaggi@imagesgroup.in, +91 9611127470

East India

Piyali Oberoi | piyalioberoi@imagesgroup.in, +91 9331171388

Editorial Contacts

Surabhi Khosla

surabhikhosla@imagesgroup.in

Charu Lamba

charulamba@imagesgroup.in