

Ahead of What's Next

Progressive GROCER

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INDIA EDITION

BEVERAGE OPPORTUNITIES

Plant-based beverages are becoming more accessible due to innovation and investments in the segment.

RETAIL SOLUTIONS

Phygital24's digital ordering platform helps retailers to unlock significant value for their physical stores.

CATEGORY WATCH

FOOD STAPLES

Already benefiting from pandemic trends, they will continue to see opportunities ahead.



Wildermart:
Bangalore-based online store offers solutions to make everyday consumption clean and green.

Swaroop Mohan, MD and Shweta Thakur, CEO, Wildermart

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G

rocery store workers have been on the front lines of a global crisis for over a year. So, the industry now has a better idea of how they're feeling about their jobs when it comes to support and training.

A majority of grocery workers experienced a shift in their job tasks during the pandemic. While many had their jobs or roles changed, most workers received no training for their new responsibilities given the pandemic conditions on the ground.

In light of these facts, there might be only a small proportion of the workforce who still feel satisfied or, at minimum, somewhat satisfied working with their employers. Among the newly hired workers, levels of satisfaction with the training and support provided during COVID-19 is likely to fall short of the expectations.

Given the low levels of workers' satisfaction, few workers are likely to recommend their employer as a place to work even though most trust their capacity to do their jobs even with a lack of training.

However, in a consumer-facing industry such as retail, employer's training program is an invaluable tool in teaching staff to handle new things and situations and keeping their efficiency and motivation levels high.

Retailers should not overlook their training regimen for employees. The time devoted to training could lead to key improvements across nearly all retailing metrics. It could change the retailer's overall industry rating besides improve communication across all departments and, most importantly, make employees ready to respond to and handle any future crisis.

Amitabh Taneja
Editor-in-Chief

All feedback welcome at editorpgindia@imagesgroup.in

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Brands, especially those selling good-for-you food products, have already benefited from pandemic trends and will continue to see potential opportunities in their product categories. But both retailers and manufacturers have the opportunity to “reset” what value means to consumers and how they are best placed to meet the new needs moving forward.



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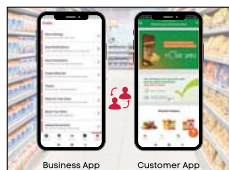
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COVID-19 has sparked a new wave of innovation across consumer industries: Accenture Research

Successful consumer-facing companies are repurposing physical locations, exploring new business models, and rapidly adopting advanced analytics and other disruptive technologies to find new sources of growth.

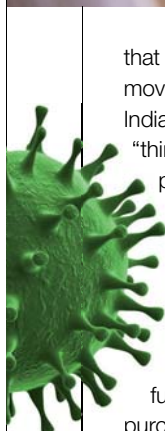
The COVID-19 pandemic has changed the way people live, work and socialize, accelerating demand for innovation, as retailers, consumer goods, and travel companies shift from reacting to the crisis to reinventing products and services, according to findings of a new global survey from Accenture.

The latest survey of more than 9,650 people in 19 countries including more than 500 people in India, supports Accenture's previous findings that many changes in behaviour will likely be long-term.

"The past year has been a tough one for consumers and consumer-facing industries. Evolving consumer preferences and behaviours have led to huge demand fluctuation, making it imperative for consumer goods and retail companies to stay agile and resilient. As companies shift from reaction to reinvention, they need to harness digital's full potential across the value chain at speed and scale," said **Anurag Gupta**, *managing director and lead - Strategy & Consulting, Accenture in India*.

Manish Gupta, *managing director and lead for Products practice, Accenture in India*, said: "To succeed in a post-pandemic economy, companies need to digitally reinvent themselves and strategically invest in technology, people and supply chains. Adoption of digital technologies such as cloud, artificial intelligence, advanced analytics, combined with a well-defined purpose, can help companies to not only reach out to consumers in innovative ways but also adapt faster to the evolving market demands."

Dawn of the "third space": The pandemic forced a rapid shift to employees working from home, with many expressing



that they want flexibility in how and where they work moving forward. More than 87% of respondents in India said they would like to occasionally work from a "third space" — a location other than their home or place of employment. This highlights a potential opportunity to grow revenue for the hospitality and retail industries.

Shifts in consumer habits are here to stay: The latest research supports Accenture's previously released findings that the dramatic rise in e-commerce is likely to remain or accelerate further. For instance, the proportion of online purchases for products such as food, home décor, fashion, and luxury goods by previously infrequent e-commerce users — defined as those who used online channels for less than 25% of purchases prior to the outbreak — has increased 667% since the outbreak in India.

The COVID-19 pandemic has changed the way people live, work and socialize, sparking a new wave of innovation:

Since the COVID-19 outbreak,

98%

of consumers in India have made at least one change to their lifestyle that they expect to be permanent.

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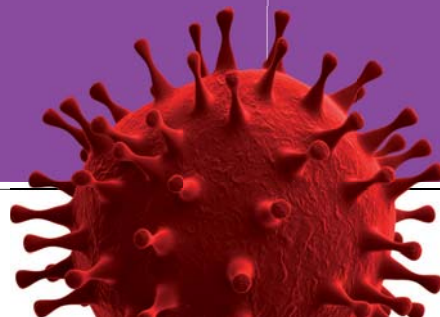
since the outbreak in India.

87%

in India would like to work from a "third space" — a location other than their home or workplace.

57%

in India will either not travel at all for work or reduce their business travel by half following the pandemic.



“The grocery space has no differentiation today, only price wars. Our online store is creating a new space for newer businesses.”

Wildermart is an honest attempt to empower consumers try to consume more mindfully and sustainably. But the options are far and few, and includes inconveniencing ourselves all the time. We were waiting for solutions to be given by corporates and we got tired of the wait. So, we became that solution.

– Swaroop Mohan, MD, Wildermart



Good-for-you food products have seen rising demand over the past year

BRANDS THAT HAVE ALREADY BENEFITED FROM PANDEMIC TRENDS WILL CONTINUE TO SEE POTENTIAL OPPORTUNITIES IN THEIR PRODUCT CATEGORIES. BUT BOTH RETAILERS AND MANUFACTURERS HAVE THE OPPORTUNITY TO "RESET" WHAT VALUE MEANS TO CONSUMERS AND HOW THEY ARE BEST PLACED TO MEET THE NEW NEEDS MOVING FORWARD.

By Sanjay Kumar

In the early days of the pandemic, many wondered why it was so hard to find basic food items of everyday consumption in local supermarkets and even online. These product shortages were attributed by many to COVID-19 fear-driven purchases by consumers as they hoarded everyday products and stocked their pantries.

When the government intensified the measures to battle the Covid-19 outbreak with a country-wide lockdown, fast-moving consumer goods (FMCG) companies and their retailers said demand surged, mainly due to the strict measures and movement restrictions imposed to contain the outbreak.

Consumers in major cities in India started to stock up on essential items, such as staples, packaged food and cooking oils. But there were also shortages of our favorite beverages and snacks, not necessarily the things we can't live without, but rather the things we don't want to live without, as food companies had to trim down their production pipelines.

In those early days of lockdowns, grocery shortages ranged from reasonably concerning to harmlessly annoying. For example, the surge in panic-buying caused shortages of even the most common staple like flour, which understandably scared many consumers.

But while these bulk purchases did play a small part in some of the shortages, the primary driver was consumers' increased time spent at home during lockdown and work-from-home initiatives. All of these factors provided the impetus for the resulting shift in consumption and increased demand for everyday staples products.



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Progressive Grocer welcomes contributions from industry professionals, experts, and analysts for writing insightful and informative articles on the food & grocery industry. You can share your observations on India's evolving food & grocery retail landscape or on any of the topics below.

Consumption trends in F&G / FMCG market; Innovations by brands and retailers; Success Stories/ Case studies on interesting concepts in F&G/ FMCG; The scope of 'Make in India' in the food sector; Modern Cash & Carry business vs. Traditional general trade and wholesale markets in India; Investments Opportunities in Food backend operations; Successful brand-retailer collaborations and partnerships; Private Labels; Successful marketing/ branding or sales campaigns by brands and retailers

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Phyigital24: Creating digital solutions to boost revenue, business efficiencies and customer experience for retailers

PHYGITAL24'S SYSTEM IS A TECHNOLOGICALLY ADVANCED SUBSCRIPTION-BASED DIGITAL ORDERING SOLUTION THAT HELPS BUSINESSES TO OFFER ONLINE ORDERING DIRECTLY FROM THEIR WEBSITES AND MOBILE APPLICATIONS, THUS HELPING RETAILERS TO INCREASE REVENUES AND UNLOCK SIGNIFICANT VALUE FOR THEIR PHYSICAL STORES.

The Covid pandemic has accelerated the use of technology and digital tools for grocery stores and other retailers. Online shopping has grown exponentially among new demographic groups, and retail brands are increasingly connecting with consumers via interactive and virtual shopping experiences.

By embracing technology solutions and e-commerce tools, retailers are able to surpass their existing revenues and business margins. This is all due to the increased market reach and by establishing online connections with the new and unexplored markets.

In the context of the currently changing nature of FMCG retail in India – when the e-Commerce market is forecast to expand at a compound annual growth rate (CAGR) of ~18.15% to reach a value of INR 10,494.3 billion by 2024 from INR 3,550.7 billion in 2018 (IBEF data) – players like Phyigital24 have stepped in to provide the much-needed upgrade to the retail eco-system.

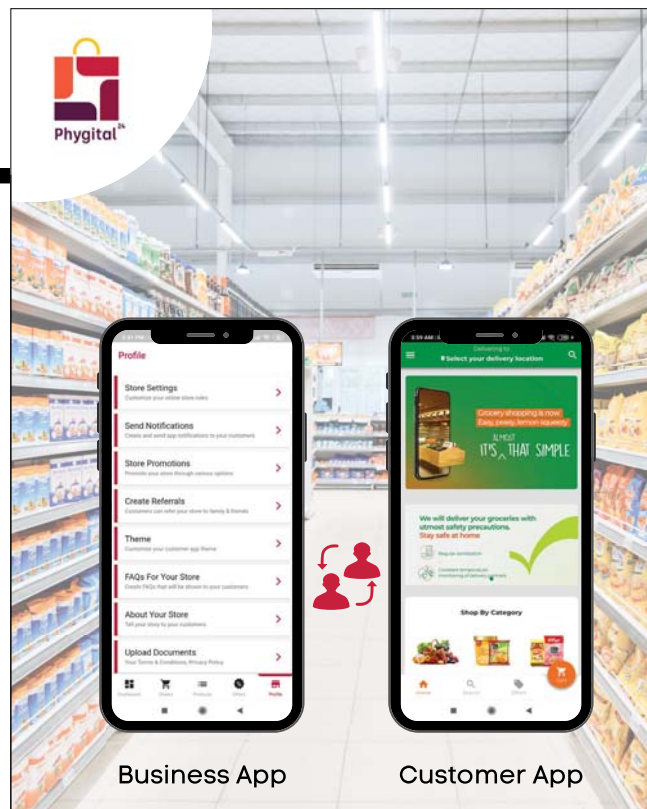
Increased adoption of smartphones and access to the Internet, along with streamlined logistics infrastructure are key factors driving the growth of the e-commerce market in India.

This means that the stage is set for whopping growth in the size of the e-commerce market in India. To tap into these favourable market conditions and to give a huge shot in their arm for boosting revenue and market reach, retailers need to put in place a digital eco-system equipped with all the necessary features capable of increasing profits.

Solutions tailor-made for retailers

In sync with the emerging needs of business and commerce, Phyigital 24 website ordering system offers a high conversion online ordering system capable of pumping up sales through simple to use and powerful modules to manage business rules, deliveries and user experience.

The company offers retail solutions for Groceries, Restaurant and Meat Stores and retail brands that operate in multiple locations. Its grocer



online ordering platform helps to drive higher sales and smoother operations for the retailers while streamlining grocery ordering and delivery operations.

No wonder that progressive retailers are lapping up Phyigital24's digital solutions for grocery and supermarket chain stores that enable them to boost revenue, digitalize and simplify customer experiences and improve business efficiencies.

The company's client base comprises mid-sized local brands that do not have the tech know-how but are ready to compete with larger players and MNCs. The solutions offered by the company are currently available in geographies spread across India and North America.

For the grocery industry, Phyigital24 cloud e-Commerce platform has helped create an entrepreneur's ecosystem for major retailers such as Sampoorna, Vijetha Supermarkets, Ushodaya, Get Farm Fresh, Local Garden, PocketSaver, Freshito, among others. Besides, the company also created the CSC Grameen e-Store, which was an instant success and appreciated by Central Minister for IT Ravi Shankar Prasad.

Looking ahead, Phyigital24 plans to add 1 lakh small businesses to its freemium business model, and more than 1000 medium- to -large multi-chain stores by this year itself. The company also plans to offer a wide range of other services to customers and expand to other verticals such as specialized point-of-sale systems, customer relationship management systems, and inventory management systems for supermarkets, groceries, and restaurants. **PG**

Do you know where your baby's food comes from?

FOOD TRACEABILITY AND ITS IMPORTANCE WHEN IT COMES TO INFANT AND BABY FOOD PRODUCTS.

By Aswani Chaitanya

Issues with food adulteration and reports have been coming to our attention now and then. Though these reports are easily forgotten, the important aspect to consider is how these products can impact our health.

In the last decade, there has been a lot of conversation and movement around eating healthy, being fit and following a healthy lifestyle.

However, apart from surface level awareness about our food, do we really understand the journey of our food? Where is it grown? How is it manufactured? These are questions that a new age consumer would like answers to. Food traceability plays an important role when it comes to maintaining food safety. In the case of baby and infant food, it plays an even bigger role.

Food traceability is the process where a business can offer complete traceability and transparency for various ingredients and raw materials used in the finished product. Through food traceability, consumers can track the journey of the product throughout the supply chain.

A report published by Markets and Markets indicates that the food traceability market is projected to grow at a CAGR of 9.1% with its estimated value reaching \$ 26.1 billion by 2025. The growing demand for safe products and the need for transparency in the supply chain are considered to be the reasons behind this demand. With the growing concerns about eating and living healthy, building trust in the products a consumer buys is becoming important. This has become even more crucial when it comes to infant and baby food.

"You are what you eat" is a phrase that most of us grew up hearing from our parents. Today's parents have taken it a step further by going a little deeper into where, how and what comprises our food. From cleaner labels to transparent supply chains, parents today want to understand what they are feeding their children.



Resolving Supply chain problems to strengthen the roots of Indian agriculture

MORE THAN OTHER SECTORS, AGRICULTURE DEPENDS ON A FUNCTIONAL LOGISTICS SYSTEM. WITHOUT A ROBUST AND EFFICIENT SUPPLY CHAIN, IT IS IMPOSSIBLE TO IMAGINE FRESH AGRICULTURAL PRODUCE ON THE SHELVES OF GROCERY STORES.

By Shobhit Gupta



A

griculture employs around half of India's workforce and uses three-fourths of the country's freshwater resources. However, it contributes only one-sixth of the country's GDP. This is because most agricultural production comes from small family farmers who do not have the capacity, scale or necessary

technical support to increase efficiency. The convoluted and unorganised system of supply chains and a deficient infrastructure of marketing for agricultural products also play an important part in holding back the sector.

More than other sectors, agriculture depends on a functional logistics system. Without a robust and efficient supply chain, it is impossible to imagine fresh agricultural produce on the shelves of grocery stores. These supply chains have been evolving over the years but a lot of work still needs to be done by stakeholders to have a modern seamless agricultural network in the country.

Supply chain challenges faced by the Indian agriculture industry

Poor management of Agriculture Supply Chain

India is the largest producer of fruits and the second-largest producer of vegetables in the world. Despite this, the market availability of quality fruits and vegetables is quite low due to the lack of appropriate facilities for transportation and storage.

Lack of Infrastructure and storage facilities, specially at the farm level

Every year India sees a large amount of food loss due to a lack of storage and adequate infrastructure. NCCD indicates a 97% shortage of farm level infrastructure for the Horticulture sector. A large number of refrigerated vehicles are also required as less than 2% of India's fresh produce is carried by refrigerated trucks. India's requirement for refrigerated transport units (vehicles or multimodal containers) is 61,826 units of carrying capacity of 10 tons each.

Food safety and quality

Food safety has become a major concern across the world. Consumer awareness and demand have pushed many nations to adopt a systematic regulatory framework to make food handling and procurement safer. A major aspect of this is the focus on limiting pesticide and chemical levels in fresh food.



Bearing Fruit

INTERESTING NEW VARIETIES, LOCALLY GROWN ITEMS AND CONVENIENT PACKAGING HELP GROCERS ENHANCE THEIR SEASONAL FRUIT OFFERINGS.

By Lynn Petrak

A

s roadside farmstands and farmers' markets get underway, retailers can compete and attract shoppers to the produce section with seasonal fresh fruit offerings that meet consumers' preferences for taste, variety, nutrition and sustainability. The market for seasonal fruit is — pardon the pun — ripe with opportunity.

Consumers may not be eating the recommended amount — a recent survey from the Produce for Better Health (PBH) Foundation shows that 80% of

Americans under-consume fruits and three-fourths of consumers eat fruit at least once a week — but fresh fruit remains a perennially popular food-stuff, and the category is making modest gains, with the potential for more. Brentwood, Mo.-based PBH finds that fruit has experienced a slight increase in net consumption frequency since 2015. Importantly for grocers, almost 72% of fruit is consumed at home, and at-home consumption is increasing in frequency.

The pandemic helped boost interest in fresh fruit eaten at home even more. The most recent "Power of Produce" report from Arlington, Va.-based FMI — The Food Industry Association shows that the 40% of shoppers who buy more fresh fruit now attribute their intake to increased snacking and breakfast consumption, habits fueled by pandemic-era lifestyles.

Coming out of the era of social distancing, those new behaviors are balanced by a return to entertaining. According to a study from Chicago-based C+R Research, 42% of shoppers say that they're more likely to purchase unique products to make summer gathering more fun.

To keep momentum not only going but also growing, retailers and their produce department teams can focus on seasonal fresh fruit products with attributes that appeal to today's shoppers.

Garden-Variety Favorites and New Bloomers

Familiar favorites dominate fresh fruit sales, with per capita eating occasions led by bananas, apples, strawberries and oranges, according to the PBF findings.

However, even as consumers enjoy the classics, buzzworthy new varieties often gain traction on social media and spill over into real demand at grocery. Over the past few years, interesting varieties and hybrids like Cotton Candy

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Key Takeaways

- ▶ To keep fresh fruit sales growing, grocers can focus on seasonal items with attributes that appeal to today's shoppers.
- ▶ Among trending varieties, tropical fruits should be hot, aligning with tropical fruit flavors popular in other types of foods and beverages.
- ▶ Additionally, convenience can elevate fresh fruit at retail.

grapes, Tangelos and Meyer lemons have caught consumers' attention.

What kind of new or interesting fruits should retailers be looking for this summer, at the height of fruit production in many parts of the United States?

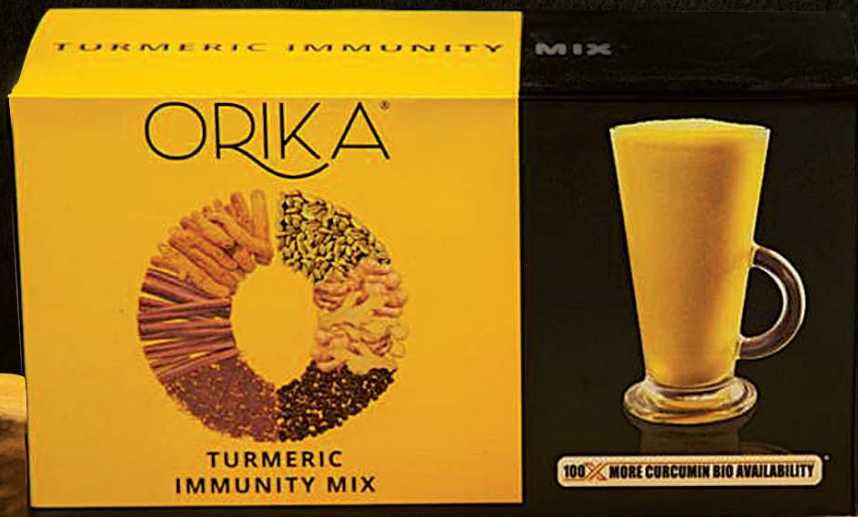
Tropical fruits should be hot, aligning with tropical fruit flavors that are trending in other types of food and beverage categories. In addition to tropical fruit stalwarts like pineapple, mango and grapefruit, grocers can look to reinvigorate their produce sections with tropical items that have grown in



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