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# Progressive GROCER

Ahead of What's Next ▶

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## RESEARCH

Doubling retailers' incomes through focus on beverages

## GROWTH STRATEGIES

Visual Merchandising in the New Technology Era

## TECHNOLOGY

Why AI Could Be the Solution Your Store Needs



### FROZEN FOOD

Retailers & Brands are introducing value addition and innovation to a wider range of ready-to-eat meals, snacks, desserts, and beverages.



# ChopServe

*A new Jedi swings out to rewire the nation's purchasing habits for fish & meat*



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At a time when competitive intensity is heating up in every sphere of business, Grocery Retailers and Food Brands are scrambling to grab the consumer “share of stomach” alongside their mindshare and wallet share.

In the past issue of *Progressive Grocer*, we highlighted how the beverage category is seeing the entry of many new players as well as the broadening of its consumer base. With a surge in innovation and product drops, national and regional brands are attempting to create a niche market for themselves by targeting different consumer segments and offering unique differentiation. In this issue, we take another approach to the sector through a report that highlights how retailers can double their income from higher sales of beverages. The report drills down to the policy details conducive for the beverage sector and the changes that policymakers can bring about to make India the beverage capital of the world. (see pages 18–22).

Like beverages, the frozen food category too offers big opportunities for brands and retailers to cash in on the growing appetite for frozen food. Our story on frozen food (see pages 42–54) shows how the category is showing a constant uptick in sales and consumer demand, and why retailers and brands need to diversify their product portfolio to offer a wider range of frozen food products, such as ready-to-eat meals, snacks, desserts, and beverages, to cater to the varying needs and preferences of consumers.

Fish and meat is another food category that holds a goldmine of opportunities. Read our Cover Story (see pages 30–38) on how the Bengaluru-based omnichannel retailer ChopServe, in association with its brand partner Captain Fresh, is rewiring the nation’s purchasing habits for fish and meat products by offering a shopping experience that appeals to a deeper slate of quality concerns, freshness and hygiene among consumers.

**Amitabh Taneja**  
Editor-in-Chief

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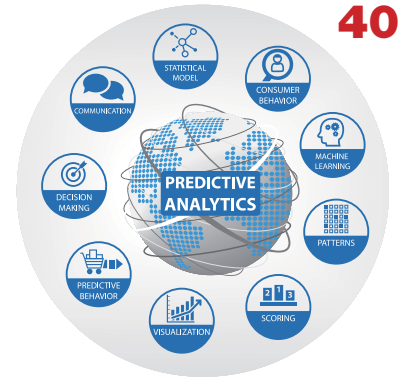


## Cover Story 30

**A NEW JEDI SWINGS OUT TO REWIRE THE NATION'S PURCHASING HABITS FOR FISH & MEAT:** Beginning its business journey with fish and seafood supply to a B2B customer base comprising supermarkets and online meat retailers, ChopServe today runs some 94 stores across major cities of south India and in Dubai where it has currently crossed the 20+ store milestone.

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## How to double retailers' income through focus on beverages sector

Acting through on some strategies by policymakers can turn India into becoming a powerhouse for the beverages sector. A moderate tax rate on the beverages sector will help shift the consumer to consume healthier and safer products, increase retailer's income and generate more revenue for the government through sale of healthier products at an attractive price point, BESIDES propelling the whole beverage ecosystem forward. All of these measures will help achieve the objective of Doubling Retailers' Income.

By Hansa Research (Part of the R.K. SWAMY Group)

India's aspirations, its pride and self-esteem, have time and again been reiterated by our Prime Minister. One of it is to develop our own 'markers', with the aim to reach 'Amrit Kaal' in the next 25 years.

In keeping with the same aim, this white paper will focus on how the country can become a powerhouse for the beverages sector. This sector has a substantial role to play towards turning the nation into becoming a 'Shining India'. Some of the targets this white paper aims to highlight are:

- ▶ How India can become the beverage capital of the world.
- ▶ Bring innovation to a stagnant beverages sector.
- ▶ Double retailers' income through focus on beverages.
- ▶ Augment farmer income and undertake job creation.
- ▶ Enhance investment in food processing technology.
- ▶ Move from unorganized / counterfeit to a more formal economy.
- ▶ Enhance revenue generation for the Government.



**Technology is the centerpiece, but building relationships between consumers and the people delivering their food is the element that humanizes and elevates the digital shop-and-drop experience.**

“Shipt originated as a disruptor in the retail technology space,” says Hurst. “It goes all the way back to our roots: founded in 2014 in Birmingham, Ala., with a goal of helping individuals with little or no time for grocery shopping. As Shipt has grown, we’ve leveraged our technology to empower consumers and retailers alike. For retailers, Shipt offers an easy solution to bring both the convenience of reliable delivery to their current customers and an opportunity to meet new customers for incre-

## Out of the Box

GROCERY DELIVERY SERVICES ARE SHAKING UP THE STATUS QUO IN NEW AND EXCITING WAYS BY FACILITATING FOOD RETAILERS’ OMNICHANNEL OPERATIONS. **By Mike Duff**

# D

igitally based delivery has changed the grocery sector, with players in a constant frenzy to be the next biggest disruptor in the market, but the combination of demand, technology and experience, along with the recognition that a huge opportunity exists for whoever can drive the next phase of development, has service providers innovating intensely to put online ordering and at-home fulfillment on a par with in-store shopping.

Whether a company has evolved in the delivery sector or, like San Francisco-based Uber, has converted a compatible operation to take a unique approach to domestic drop-off, ongoing investment and technological advances promise rapid evolution.

Shipt, of course, has been among the more recognized delivery companies, not only for its early appearance on the delivery scene, but also for its operational development and rapid growth. However, its acquisition by Minneapolis-based Target lifted Shipt’s profile even further, which has not only changed the course of its development, but also that of the big-box retailer, which has quickly made pickup and delivery much more central business functions.

In essence, disruption is in Shipt’s DNA, according to the company’s chief business officer, Rina Hurst.

mental sales.”

She adds: “Third-party delivery services leverage scale across a market to keep costs for partners low and can flex their business models to prepare for peaks in retail demand. Companies like Shipt can offer grocers support that would be extremely capital- and labor-intensive for an individual grocer to buy or build and maintain.”

Shipt maintains a commitment to developing first-to-market delivery operations that prioritize the changing needs of an extremely diverse group of customers, notes Hurst.

Meanwhile, DoorDash is coming up to its 10th anniversary in business and continues to look at the flexibility built into its delivery



### Key Takeaways

- ▶ **Ongoing investment and technological advances promise rapid evolution in the grocery delivery space.**
- ▶ **Grocery delivery services are helping to bring about a world where the store visit is only one of several options that consumers will pick, depending on their needs at the moment.**
- ▶ **Flexibility and personalized relationships with customers, grocers and CPG companies are key to success in this sector.**



## Visual Merchandising in the New Technology Era

A STRATEGIC WAY TO IMPROVE CUSTOMER EXPERIENCE AND INCREASE SALES IS TO USE CUSTOMER DATA AND OFFER HYPER-PERSONALIZED SHOPPING EXPERIENCES, WHICH AI CAN PROVIDE WITH VALUABLE INSIGHTS INTO THE MOST POPULAR PRODUCTS, THEIR IDEAL PLACEMENT INSIDE THE STORE, AS WELL AS BY ASSESSING THE NATURE OF FOOTFALL, DWELL TIME, AND PURCHASE HISTORY.

By Sushil Munshi

**T**he retail sector has seen a significant upheaval in the changing business landscape, defined by the advancement of digitalization, e-commerce, and evolving consumer expectations. Businesses must continually unearth new ideas to improve the in-store shopping experience to increase sales and establish consumer loyalty in the ever-changing retail landscape. Hence, incorporating technology can be a highly effective method for attaining the best outcomes in visual merchandising. Examining the most recent technological advancements influencing retail is crucial as we enter visual commerce in the digital age.

### The AI Revolution in Visual Merchandising

Artificial Intelligence (AI) has revolutionized retail business operations, and visual merchandising is no different. In the fast-changing retail world of today, retailers now have the access to use AI-powered data to gain a competitive edge. Retailers may obtain deep insights into customer behavior, preferences, and trends by leveraging the power of modern data analytics. With this information, businesses may improve their product displays and shop layouts to increase sales and conversions. Indeed, the capacity to use AI-powered analytics has become a vital aspect of modern retail operations' success.



## A NEW JEDI SWINGS OUT TO REWIRE THE NATION'S PURCHASING HABITS FOR FISH & MEAT

When ChopServe entered the market in 2018, buying options for fish and meat consumers were few and far between even in a frontline city like Bengaluru. Very few entrepreneurs were paying any attention to the meat retailing omnishambles across the country.

ChopServe decided to look under the hood of this murky market and launch operations that would appeal to a deeper slate of quality concerns, freshness and hygiene among consumers. They re-merchandised the front end, thus cutting to the heart of fish and meat buying experience.

Beginning its business journey with fish and seafood supply to a B2B customer base comprising supermarkets and online meat retailers, ChopServe today runs some 94 stores across major cities of south India and in Dubai. It has currently crossed the milestone of 20+ stores in Dubai.

The brand's 70+ stores in Chennai, Bengaluru, Hyderabad, Cochin, Trivandrum, Madurai, Kollam, Coimbatore, and Goa are helping the ChopServe brand kick the company's growth trajectory into higher gear. The brand also has partnerships with major supermarkets in various southern cities and exports its products to many countries in the Middle-East and other overseas markets.

By Sanjay Kumar



L to R: Karthik Regunathan and Sankar Sundararaman, Co-Founders, ChopServe

## Concerns around price, health and freshness hinder the growth of frozen foods

### Pricing

More than a third of Indian consumers feel that frozen foods are expensive. Offering small packs can drive trial. Moreover, demonstrating value through taste and health is key to attract frozen food non-purchasers.

### Health

Frozen foods are perceived as highly processed, made with artificial ingredients and containing a high amount of preservatives. Brands can boldly counter this by introducing products made with nutrient-rich, natural ingredients.

### Freshness

Indians are accustomed to eating freshly made foods. This is one of the critical barriers for frozen foods, as they are perceived to be not as tasty as freshly made ones. Frozen foods will have to emphasise their authentic flavour, which replicate the taste and experience of freshly made varieties.

### Competition with shelf-stable RTC/RTE products

Frozen formats are relatively new and are yet to establish a place in Indian kitchens. Consumer perceive shelf-stable ready-to-eat (RTE)/ cook (RTC) snacks/ meal to be healthier and more convenient than frozen products.

Source: MINTEL



**“ It is tough to comment on the contribution of frozen food to the overall food business. This category is niche and is slowly taking a share of the regular snacking options available currently. Frozen increases the average basket value as compared to the regular snacking options available in the category.”**

– BVK Raju, Promoter & Director, Q-Mart

smaller towns, and this will penetrate further into all the towns. All leading players of the industry are investing into the creation of freezer spaces in independent outlets.

Furthermore, end-users can now easily buy frozen food products through various distribution channels such as supermarkets and hypermarkets, convenience stores, departmental stores, and online marketplaces. India's booming e-commerce sector has further propelled the growth of the frozen food market as online platforms offer high product visibility and product listing at nominal costs in comparison to traditional retail platforms. This factor has significantly facilitated greater market penetration of frozen food products in India.

According to a TechSci Research report, the double-digit growth of the frozen food category will be driven by an increasing number of modern retail chains, rising number of refrigeration facilities in small retail shops and rural households, rapid development of fast-food chains, aggressive marketing

strategies by major frozen food manufacturers, and longer shelf life and easy availability of frozen food products.

### Consumer trends and retail potential of frozen food

Until about a few years ago, frozen food manufacturers were largely dependent on the export market, which helped them earn a large part of their revenues. However, with the growing importance and penetration of frozen food in the commercial and retail sector, the domestic market has also turned out to be lucrative now with an expanding consumer-base even as manufacturers are constantly coming up with new product variants, such as frozen fruits and vegetables, frozen snacks, frozen poultry, meat and seafood products, frozen ready-to-eat meals, among others.

“In the period between 2023 and 2028, the household disposable income of consumers in India is expected to grow the fastest amongst the top ten economies globally, indicating an overall improvement in the standard of living. This will increase the consumer spending on food categories like frozen products,” says Ganesh of Euromonitor.

Today, India's foodservice sector comprising quick service restaurants, fast food chains, hotels and cafes - not only in the metros but even in Tier-II and Tier-III cities - offer their customers the finest in food along with ambience. They have started using frozen food to serve their orders quickly and efficiently without any hassles. Recent years have seen an increase in the use of frozen food products by giants such as KFC, McDonald's, Pizza Hut, Subway, among others.



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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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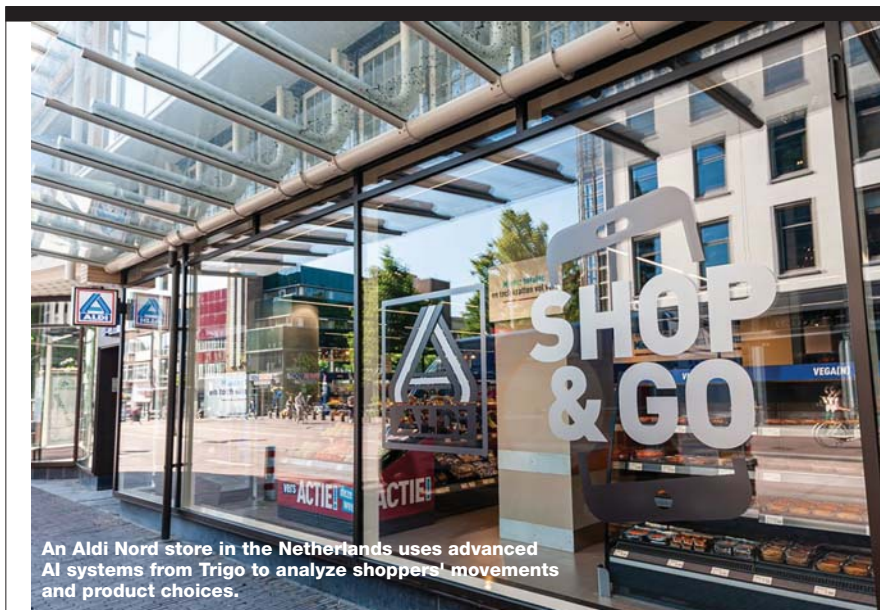
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An Aldi Nord store in the Netherlands uses advanced AI systems from Trigo to analyze shoppers' movements and product choices.

# Why AI Could Be the Solution Your Store Needs

ARTIFICIAL INTELLIGENCE MIGHT SEEM FUTURISTIC, BUT ITS APPLICATIONS ARE DELIVERING RESULTS RIGHT NOW. **By Emily Crowe**



Artificial intelligence (AI) is one of those terms that can conjure up a lot of images and ideas, from lifelike robots to futuristic video games. Its current uses are much more down to earth, though, and food retailers large and small are finding ways to harness its power to forecast demand and stock, customize promotions, create frictionless shopping journeys, and so much more.

AI leverages data, computers and machines to accurately mimic the problem-solving and decision-making capabilities of the human brain. In retail, this can translate to machine learning that uses customer analytics to predict trends, Internet of Things solutions that can help streamline operations, or computer vision that brings business insights to physical stores.

With myriad additional applications, AI is rapidly taking the grocery industry to the next level during a time when price volatility, labor shortages and competitive markets threaten to derail its progress. Whether it's used in the picking, packing, stocking, decision-making or purchasing step of the retail journey, the technology can bring unprecedented efficiencies and customer value to every kind of grocery operation.

## Keeping It Fresh

Maintaining the freshness of produce, meat and other perishable products is a perennial problem for grocers, along with ensuring that very little of them go to waste, but AI is now being employed to help create solutions. San Francisco-based Afresh Technologies, for example, has created AI-based networks that can predict demand trajectories over time to help forecast how demand will change over the next few orders. The company's state-of-the-art neural networks take into account several fresh variables for each forecast, in turn helping to build the best order possible.

Afresh recently joined forces with food solutions company SpartanNash to pilot the AI-powered predictive ordering and inventory management solution at 10 Grand Rapids, Mich.-area Family Fare grocery stores. Not only will this ensure fresher products for Family Fare's customers, but it will also empower the banner's associates to make decisions based on hard-earned data.

"Our partnership with Afresh will help SpartanNash deliver fresh produce to our store guests while also minimizing food waste, which is a key focus area for our company's ESG efforts," said SpartanNash Chief Merchandising Officer Bennett Morgan, when the technology rolled out to the stores in December. "Leveraging the strength of artificial intelligence and digital workflow will provide our associates with insights to create solutions that benefit our corporate retail store guests."



## Key Takeaways

- ▶ **With myriad applications, AI is rapidly taking the grocery industry to the next level.**
- ▶ **The technology can help grocers create a seamless, friction-free customer experience.**
- ▶ **The practical use of AI can also allow a retailer to see how profitable every shelf is, how it's performing, and thereby find ways to dynamically optimize its operations.**

WHAT'S NEXT  
**PRODUCT LAUNCH**

**PRODUCT LAUNCH**



**Cravova launches new variant of Jamaican Mojito (Guava flavor)**

**C**ravova has introduced a new variant of Jamaican Mojito (Guava flavor) with a brightness of pink, to take you for a tropical ride through one's eyes.

Loaded with Vitamin C, this product is a perfect friend to beat the summer's heat with zingy zest of ginger & a hint of salt. The unusual spicy and minty flavors along with the slightly sour notes of lemon will give one's taste buds a soothing sensation. It is a perfect drink to curb down your sugar cravings.

This new beverage can quench thirst and rejuvenate the senses with the freshness of mint. The all-new Mojito could be used as a refreshing drink by itself and can also work well in combination with other beverages as a mixer.



**KEVENTERS brings 10 new flavors in Thick Shakes**

**I**ndian dairy brand Keventers, known for its Milkshakes and Ice-creams, has unveiled 10 new flavors of its Thick Shakes, which will be available across all Keventers outlets in India.

The range of flavors include Nutty Peanut Butter, Choco Brownie, Kit Kat, Oreo, Mocha Mania, Snickers, Exotic Mango, 5-star, Rasmalai, and Sitafal. The brand has also brought a touch of exclusivity to the table, serving something for everyone. These thick shakes are made with fine ingredients and have a smooth texture. They are available at a price of Rs. 239.

Speaking on the new product launch, Agastya Dalmia, Founder & CEO, Keventers said, "Our passion for innovation and excellence is what drives us at Keventers, and our new thick shakes are a reflection of that. Made with extra ice cream and packed with flavor, these beverages are the perfect addition to our product portfolio. We are proud of our team's hard work and dedication in bringing unique and delicious options to our audience."

Keventers is a brand, established in 1925 by Edward Keventer. Currently, the brand has a presence across India, the UAE, Oman and Kenya.

**ITC's B Natural Launches 'Fruits 'N Bits'**



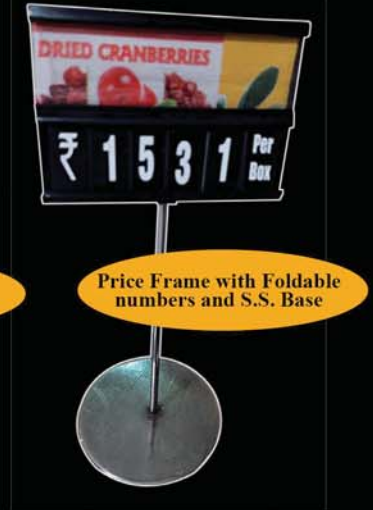
**I**TC's B Natural Juices & Beverages has launched a new range of fruit beverages named Fruits 'N Bits. It is 100% fruit beverages infused with fruit chunks & seeds. The beverages have zero concentrates and no added preservatives.

The new range comprises three variants - Mixed Fruit, Litchi (with Apple) & Guava, priced at Rs. 65 for 300 ml PET bottles. Additionally, the fruit beverages are packed in recyclable aseptic PET bottles. The three variants will be available across major retail stores and E-commerce platforms across the country.

Commenting on the launch, Sanjay Singal, Chief Operating Officer, Dairy & Beverages, ITC Ltd, said: "In line with B Natural's ethos, we are happy to launch our new range of fruit beverages combined with the richness of real fruit chunks and seeds. We have always endeavored to create world class products and with the new launch, we aim to provide our consumers with a superior range of fruit beverage experience".

He further added, "At B Natural, we always take pride in the fact that our entire range is manufactured from Indian fruits, sourced entirely from our very own Indian farmers".

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