

IMAGES Business OF *food*

May 2025 • VOL 2 • No. 6 • ₹100

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BEVERAGE

Shifting consumer preferences are redefining what, how, and why we drink.

FOOD SERVICE

How changing consumer priorities are reshaping the food landscape.

New Market Opportunities Emerge for US turkey in India



~50%: Global Brands Drive Half of India's Chain QSR Footprint.

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**From a Chicken Store
to West Bengal's
thriving**

**87-STORE
CONVENIENCE
CHAIN**

Biyas Roy, Executive Director,
Arambagh's Foodmart Pvt. Ltd

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Editor's Note

➔ India's rural FMCG market, valued at \$23 billion, is brimming with untapped potential. With 65% of India's population living in rural areas, the rural FMCG sector is poised for explosive growth, driven by increasing demand and shifting consumer behavior. Yet, businesses face significant logistical and infrastructural hurdles that can impede effective distribution. Read our story on *pages 24-26* to discover why companies seeking to thrive in this space must innovate their product offerings, partner with local stakeholders, and leverage digital solutions to overcome the challenges and capture market share in this evolving landscape.

Arambagh's Foodmart, West Bengal's largest retail chain began as a modest poultry venture in 2000 and has grown into a formidable retail network with 87 stores across 12 cities and annual revenues nearing Rs. 150 crore. In our cover story in this issue, on *pages 28-37*, we take a deep dive into how Arambagh's Foodmart has rewritten the rulebook for regional retail by blending local insights with scalable innovation to meet the everyday needs of its growing customer base. It's a case study in how legacy meets agility—and wins..

Speaking of agility, nowhere is that more evident than in India's booming beverage market, which hits full throttle every May as the mercury climbs. But this isn't just about thirst—it's about transformation. From Reliance's Rs. 10 bottled water disrupting price dynamics to sugar-free seltzers finding favor among millennials, the beverage aisle is now a battleground of health, innovation, and cultural shifts. On *pages 50-64*, we unpack how quick commerce, functional hydration, and even regional flavor nostalgia are shaping what India reaches for when it's time for a drink.

And as temperatures rise, so do cravings—for something sweet. But today's desserts are not just indulgences; they are expressions of values. Sustainability, health, and tech-driven creativity are converging to redefine how we treat ourselves. Turn to *pages 46-48* for an exploration of the new wave of desserts: gelato taking the lead, low-sugar becoming the norm, and yes, even 3D-printed pastries making their debut. It's a world where tradition meets disruption—on a plate.



Amitabh Taneja | Editor-in-Chief

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From a Chicken Store to West Bengal's thriving

87-STORE CONVENIENCE CHAIN

What started in 2000 as a small chain of "Arambagh's chicken" stores, offering fresh and processed poultry, evolved into a far more ambitious venture in 2012—Arambagh's Foodmart Pvt. Ltd. Today, with 87 stores across 12 cities in West Bengal and annual sales nearing Rs. 150 crore, Arambagh's Foodmart has become a leader in convenience, quality, and innovation in the region's retail sector.

Biyas Roy, Executive Director, Arambagh's Foodmart Pvt. Ltd



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QSRs as Rising Stars in India's Food Service Industry

How Quick-Service Restaurants Are Shaping the Future of Dining in India



Chain Restaurants and QSR Market have Grown Much Faster within the Food Service Market and the Growth is Expected to Sustain

Segment-wise Growth in Indian Food Service Industry:

CAGR	FY 10-15	FY 15-20	FY 20-25 (E)	FY 10-20	FY 10-25 (E)
CHAINS	21%	18%	20%	20%	20%
RESTAURANT-IN-HOTEL	10%	8%	5%	9%	7%
QSR	29%	19%	23%	24%	24%
CASUAL DINING	18%	19%	19%	18%	18%
CAFE	16%	8%	10%	12%	12%
ICE-CREAM PARLOUR	15%	16%	17%	15%	16%
PBCL	25%	22%	16%	23%	21%
FINE DINING	5%	3%	2%	4%	4%

Source: Technopak research as published in Sapphire Foods DRHP, Ambit Capital Research



The Untapped \$23 Billion Opportunity: Seizing Growth in India's Rural FMCG Market

India's rural FMCG market, valued at a staggering \$23 billion, is brimming with untapped potential. With 65% of India's population living in rural areas, the rural FMCG sector is poised for explosive growth, driven by increasing demand and shifting consumer behavior. Yet, businesses face significant logistical and infrastructural hurdles that can impede effective distribution. Companies seeking to thrive in this space must innovate their product offerings, partner with local stakeholders, and leverage digital solutions to overcome these challenges and capture market share in this evolving landscape.

By **Hardesh Handa**

The rural FMCG market in India presents both an exciting and complex opportunity, holding vast untapped potential. With a market value of \$23 billion and a customer base accounting

for 65% of the population, rural India offers a powerful growth avenue for FMCG companies. However, the road to success is filled with obstacles, including logistical challenges, inadequate infrastructure, and stiff competition from established players. To fully capitalize on this growth potential, companies must navigate these hurdles while also innovating their product offerings and distribution strategies.

Opportunities in Rural FMCG

Market Size: India's rural FMCG market is a highly lucrative sector, valued at \$23 billion, a testament to its immense potential. Despite its size, it remains underexploited, providing room for companies to expand their footprint.

Population Base: Rural areas are home to 65% of India's population, yet these markets are often overlooked by traditional FMCG distribution

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READY, SET, SERVE!

Get an exclusive look at the fast-evolving world of Ready-to-Eat and Ready-to-Cook foods in our June 2025 issue. Discover the trends shaping this \$28B+ market, meet the brands transforming convenience into culinary innovation, and explore what's next in the future of food. Whether it's heat-and-eat or cook-in-minutes, this is one feature you won't want to miss!

WHY PARTICIPATE?

- **Unmatched Visibility:** Be featured in a premium, industry-leading magazine read by leaders across India's HoReCa ecosystem.
- **Brand Recall:** Showcase your innovation to a targeted audience of industry professionals.
- **Thought Leadership:** Share Your Insights on the Beverages category.



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A woman with dark hair, wearing a black and white patterned kurta and white trousers, stands in the aisle of a convenience store. She is surrounded by tall shelves stocked with various packaged snacks and food items. In the background, there are red promotional posters on the wall and a counter area with computer monitors.

From a Chicken Store to **WEST BENGAL'S THRIVING 87-STORE CONVENIENCE CHAIN**

Biyas Roy, Executive Director, Arambagh's Foodmart Pvt. Ltd

RetailGPT Bridges India's Food Traditions with AI Innovation

In India, where samosas sizzle and online grocery carts click, the food retail sector is undergoing a major shift. Quick commerce—once a novelty—is now a necessity, driven by 10-minute deliveries and demand for



convenience. But its rapid rise brings challenges in efficiency, loyalty, and sustainability. Enter RetailGPT, an AI-powered retail platform set to redefine how food businesses operate—bringing clarity, flexibility, and customer trust.

A Sector on Speed and the Edge of Strain

Quick commerce players like Zepto, Blinkit, and Swiggy Instamart have reshaped supply chains and consumer habits, especially in metro cities. From midnight cravings to last-minute needs, delivery in minutes is now the norm.

But this rapid growth brings challenges:

- Skyrocketing last-mile costs, especially in Tier I cities
- Fragmented store and product management

- Low brand loyalty due to deal-hunting
- Inconsistent customer experiences
- Rising pressure for compliance and transparency

For food brands, thriving in this space requires not just speed—but precision and control.

RetailGPT: Precision in the Age of Smarter Retail Operations

At the intersection of AI and operational efficiency sits RetailGPT, developed by Pathfinder with a mission to empower food retailers across India.

Here's how it's solving the industry's most pressing challenges:

Centralized Store and Product Management

RetailGPT's Partner Portal gives brands full control over digital storefronts—manage catalogs, configure promotions, and set delivery/payment preferences in one place.

AI-Assisted Product Content Creation

With generative AI, brands can quickly draft product descriptions within the platform. All content is verified by the brand to maintain voice and authenticity.

Flexible Promotions Management

Launch store-level promotions—coupons, category discounts, or order-based offers—tailored to seasons, sales, or regions, with easy configuration and updates.

Streamlined Fulfillment and Pickup Options

Use RetailGPT's Rider App or third-party logistics for delivery. Curbside and in-store pickups are enabled via secure QR code validation.

Payments, Refunds, and Settlement Transparency

Payments go directly to merchants with T+2 settlement cycles. Refunds for cancellations or rejections are automatic, ensuring trust and smooth operations.

Performance Dashboards and Industry Benchmarking

Track engagement by store and region. Anonymized benchmarking lets brands compare performance within their category—without compromising confidentiality.

The Path Forward: Building Operational Excellence

India's food economy is massive but fragmented, blending centuries-old culinary traditions with lightning-fast digital expectations.

RetailGPT doesn't seek to predict consumer moods; it empowers brands to operate smarter, faster, and more transparently, so they are ready for every customer, every time.

In a country where trust, speed, and personalization define loyalty, RetailGPT equips food businesses with the tools they need to thrive—not just survive.

Whether you are a homegrown brand scaling nationally or an international player entering India's quick commerce space, RetailGPT is your digital backbone for a resilient, customer-centric future.

Ready to Transform Your Food Retail Operations?

Retailers across India are invited to join the RetailGPT platform and experience a smarter, AI-powered way to manage their stores, engage customers, and drive growth.

Visit <https://pathfinder.global/RetailGPT> today to schedule your demo and start your journey toward the future of retail. ■■

<https://pathfinder.global/RetailGPT>



US turkey

From Thanksgiving to Indian Tandoors, New Opportunities Emerge

As more Indians travel abroad and get exposed to global cuisines, and as health-conscious consumers look beyond traditional meats, turkey seems poised for bigger things.

By Sanjay Kumar

Turkey meat is widely recognized as a high-quality source of lean protein, and the United States is the global leader in its production. Turkey ranks as the second most consumed poultry meat worldwide, with the U.S. and the European Union topping the list in average annual consumption. In comparison, countries like China and India are gradually adopting turkey meat as a protein source, although it remains a relatively niche market.

However, as one of the fastest-growing consumer markets, poultry demand in India is growing steadily. Already worth over \$30 billion and growing at 8-10% yearly, demand is being driven by urbanization, rising incomes, and a shift toward protein-rich diets.

At the same time, U.S. turkey has become more accessible to Indian consumers following a reduction in import duties that has led to a drop in prices. This improvement in affordability is opening up opportunities for more frequent consumption of U.S. turkey.

Indian processors can now explore value-added products such as smoked turkey ham, sausages, and ready-to-cook cuts, catering to the growing demand from the country's expanding hotel, restaurant, and modern retail sectors. Retailers also stand to gain as health-conscious urban consumers embrace turkey's leaner, healthier profile. Gourmet stores are already stocking Thanksgiving-style turkey breasts and deli cold cuts – products once niche due to prohibitive pricing.

How Changing Consumer Priorities Are Reshaping the Food Landscape

Once centered on comfort and convenience, the Indian food market is rapidly evolving into a knowledge-driven, wellness-oriented ecosystem. From the rise of functional foods and personalized nutrition to the mainstreaming of plant-based meals and sustainable sourcing, this movement is redefining both consumer expectations and business strategy across the food industry.

By Varun Madan



India stands at the cusp of a remarkable transformation in its relationship with food. What was once a market dominated by traditional comfort foods and convenience-focused options has evolved into a dynamic ecosystem where health, nutrition, and sustainability have become powerful drivers of consumer choice. As someone who has witnessed this shift firsthand through serving over a million health-conscious families, I've observed how changing priorities are fundamentally reshaping India's food landscape.

The Wellness Awakening

The modern Indian consumer is increasingly conscious about what appears on their plate. This isn't merely about following global trends—it's a profound shift in how we understand the connection between our

India's beverage market, is undergoing a dynamic transformation as global giants, local disruptors, and shifting consumer preferences redefine what, how, and why we drink. From Reliance's Rs. 10 bottled water revolutionizing affordability to urban millennials driving demand for functional and sugar-free drinks, this effervescent revolution is reshaping India's retail landscape and cultural habits.

Explore the trends, challenges, and innovations propelling India's beverage boom—from the rise of hyper-local flavors and quick commerce to private labels bridging urban premiumization and rural accessibility. As health-conscious consumers, regulatory pressures, and technological advancements collide, the battle for India's thirst is becoming as diverse and complex as the nation itself.

By Sanjay Kumar

India's beverage market, worth Rs. 2.5 lakh crore (\$30 billion) in 2022, according to IMARC Group, and projected to grow at a CAGR of ~7% during 2023-2028, is no longer just about quenching thirst. It's a battleground where global giants clash with homegrown disruptors, where health-conscious millennials are rewriting demand, and where a humble Rs. 10 bottle of water (Reliance's "Independence") can shake an entire industry.

Though beverages make up just 4–5% of India's Rs. 60 lakh crore food and grocery market (NielsenIQ, IBEF 2024), their influence is outsized. This is the story of how India drinks—and how that's changing everything.



How India's Beverage Boom is Driving a Rs. 2.5 Lakh Crore Market Revolution