



TM *future group*
india tomorrow

Net Practice



Net Practice for The Big Indian Food Business

The Magic Formula



Trust me. Nobody has the Correct Formula



But , the game will unfold in Modern Retail

The Pitch Report

- Supermarket shopping is the marker of economic well being & modernity (your early adopters).
- Customer mindset is of “Discovering and trying The New.”
- First mile of new demand & not last mile of Supply Chain.
- Trial in Modern Trade , repeat in General Trade, is the new way for brands.



Modern Retail

is the Theatre of Upgrade

Modern Trade- Upgrade, upgrade...



- -From 500gm to 1 kg ketchup
- -From Kolam to Basmati Rice
- -From Biscuits to Cookies
- -From Sunflower to Saffola / Olive Oil

How will the game now shape



Clues, Clues...

Emerging, But Assertive Markets



- At the turn of the 20th century, U.S. was the **largest emerging market**.
- Europe was the '**developed market**'.
- Consumer tastes in emerging markets, with the rise in income levels, follow the patterns of the developed markets, right?

Emerging, But Assertive Markets



- Wrong.
- If so, the U.S. Should be eating muffins, mashed potatoes, scrambled eggs, rotting cheese...
- Food, HPC, appliances, entertainment, in large emerging markets may NOT follow developed market tastes.

Asserting Markets



Large markets: Reward offerings that cater to local nuances and make them global scale.

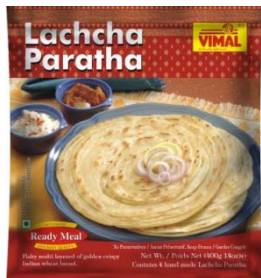
Deep markets: Customer gets validation of her behaviour from family, community, culture.

Room of influence available to marketers is partial.

Look for what the NRI's are doing



- Wanna have Paratha and Patra – even if frozen
- Food on the Go – would prefer Bhel , not Pasta.
- Want Masala in everything , even chai!!!
- Prefer Freshly Cooked , whenever available.



The “Real Cold Chain” to look for




A look inside a Desi Refrigerator..

- A whole paradigm change has happened, in relation to what's there and how much.
- WIP Foods are the In Thing – mixes , batters, spices , chutneys, kneaded dough etc.
- No Finished Meals
- For Finished Meals , **“Thanda Matlab Baasi”**.

Smart Chefs are the new Grannies!!



- Dining tables are becoming “Food Courts”
- Kitchens are becoming complex modern places
- Busy , time poor woman  heat and eat meals.

Today's Woman



- She wants super smart “mundus” , but just that
- Smart Bahu's now know Guacamole and Cholaar dal

Food, is not a detergent or shampoo.



- 75% of Food I sell, is never advertised.
- 80% of shampoo & detergents that I sell, are “bang bang “ advertised.

Food success is a lot about ...



- Consumer Intelligence
- Regional Preferences
- Technology in Formulations to ensure & add shelf life and taste
- Technology in SCM to ensure freshness.
- Taste & Sampling led sales systems

If I Were You



- I would build on what Family & Folks say about Food.
- I would do WIP food, and **leave the end credit to her.**
- I would beat competitors, in engaging Modern Trade
- I would believe in – Net Practice to IPL in 3 yrs.

Namaste

