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VOLUME TWO • ISSUE TWO

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Storm in The tea Cup

Indians consume about 10 times more tea than coffee, so why have tea bars or lounges not become as big a proposition as cafes selling coffee? There are only 40 to 50 tea bars in India currently, compared to just under 2,000 coffee outlets. As a result, tea lovers venturing outside home have no option but to go to road-side stalls to satisfy their craving. Not that the tea bar concept has not been tried before. In 2008, Tata Tea opened a tea bar in Bangalore called Chai Unchai but couldn't sustain it and it quickly closed down. The Future Group opened many outlets of a *chai* and *samosa* chain called Chamosa Bars some years ago, but that too went nowhere – the demand was not big enough.

Thankfully, some individual entrepreneurs have refused to take this lying down and a number of tea bars have begun to make their mark in the metros to a good response from the customers. Though the organized market for tea bars is currently negligible compared to the number of local tea shops, the potential for the concept is described by everyone as excellent. There is rising awareness among youth about the health benefits of tea. Also, a range of tea variants now exist to make the offerings much more diverse. Today's tea aficionados do not mind moving up the value chain to drink exotic teas on the health and wellness platform. Can the newly mushrooming tea bars be able to transform tea into an aspirational product that can effectively compete with coffee? Read our cover story to find out.

Only the paranoid survive, Andrew Grove, the co-founder of Intel Corp., once famously said. No market leader can survive without constantly watching the moves of the competitors and reinventing itself with the times. This is a lesson Domino's well knows. In this issue, we offer you a case study about how this market leader, going head to head with the rival Pizza Hut, changed its strategy in terms of product prototyping after customer complaints. This kind of flexibility with an ear to the ground is something that Indian food-service players can learn from in an increasingly competitive marketplace.

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The US-based QSR chain Subway entered India 10 years ago. Driven totally by the franchising model, today it has 250 outlets in 50 locations. Selling food – sandwiches – that is alien to the eating habits of most Indians, the company faced an uphill struggle in the first few years before it managed to crack the menu code. Manpreet Gulri, Development Agent and Country Head, Subway Systems India, talks to Varun Jain about the brand's experience in the country so far. Also, recommendations of NRAI about what the government can do to boost the Indian restaurant sector





Tea time

By Varun Jain

India has always been a tea-drinking nation, so it is surprising that no big tea bar chains exist in the country, compared to the coffee cafes. However, in a welcome sign for those addicted to tea, some high-quality tea bars have begun to sprout in various cities where they can enjoy a cup of tea in an air-conditioned cafe-like setup. So what do the tea leaves tell us about their future prospects?

Tea may not run in the blood of Indians, but it sure comes close. India is the largest consumer of the beverage in the world, consuming nearly 25 percent of the global tea production, according to a December 2011 report by trade association ASSOCHAM. India is also the second largest producer of tea after China, with six lakh hectares under cultivation in different parts of the country, producing about 950 million kilograms of tea each year. The Indian tea industry is likely to reach a turnover of ₹33,000 crores by 2015, up from ₹19,500 crores at present, clocking a CAGR of 15 percent.

“Tea is cheap, affordable, and addictive in nature. Nearly 90 percent of Indian households are regular tea-drinkers,” says ASSOCHAM Secretary General DS Rawat. “Awareness about health benefits associated with moderate intake of tea is a significant factor behind an upsurge in demand, as more and more people become aware of the healing properties of tea. It not only helps combat heart-related ailments but also lowers cholesterol, protects the skin, keeps cancer at bay, strengthens bones and teeth, and contains no calories, fat or salt.” Penetration of tea in the non-alcoholic cold beverage segment is another driving force for this industry owing to the rising affinity towards ice tea which currently accounts for over 5 percent of the entire non-alcoholic beverage market in India.

The branded segment has a share of nearly 55 percent of the total tea market in India and is growing at about 20 percent every year, almost double the rate of the non-branded segment. Interestingly, Assam produces over half of India's tea and accounts for over 12 percent of the annual global tea yield, according to ASSOCHAM.

Reading the tea leaves, one may be forgiven for thinking that India would be a land where tea lounges exist in every corner, with their owners laughing all the way to the bank. The reality, however, is different. In India, tea rules the homes,



while coffee rules the streets. National chains specialising in hot beverages exist all over the country, but they serve coffee, not tea. A Café Coffee Day or Barista running hundreds of cafes in all parts of India is yet to emerge on the tea-scape of this part of the world.

In a nation of tea drinkers, this is perhaps a scandal, considering that Indians currently consume over 9 lakh tonnes of tea every year, compared to only 80,000 tonnes of coffee, and drinking tea is considered a near-religious experience by many.

Big Market, Small Players

According to Chirag Yadav, Founder Director of Chaipatty – the three-store tea café chain in Bangalore – a tea bar is a place where you not only get tea but also a nice sophisticated ambience in which to relax and spend some time. It usually offers a good selection of snacks to go with the tea as well as concepts like the *hookah*. There are not many tea bars in India currently that fit this bill, but those which do include names like Passion – My Cup of Tea in Delhi; Tapri in Jaipur; Infinita, Chaipatty, and Chai Point in Bangalore; the Tea Junction in Kolkata; Tea Pot in Cochin; Tea Centre in Mumbai; and, the Cha Bar chain run by the Kolkata-based Oxford Book Store at its master book shops all over the country. Apart from these, there are many lesser-known regional players.

At the national level, the modern phenomenon of tea bars is mostly confined to a handful of players in metros such as Mumbai, Delhi, Bangalore, Chennai, and Kolkata. Says Parag Desai, Executive Director, Sales and Marketing, Wagh Bakri Tea Group: “There are not many tea bars in the country at present. Many open up now and then, but most do not have proper resources and shut down soon. The kind of passion entrepreneurs should have towards running a tea bar is missing and that is actually the reason why we don’t see a lot of them coming up in India.”



It is not that some national players have not tried setting up tea bars. Tata Tea, the second largest branded tea-maker in the world, unveiled the first outlet of a tea chain called Chai Unchai in Bangalore in January 2008, with ambitious plans to scale up. But in late 2009, the company announced they will exit the beverage retailing business altogether as part of the group’s strategy to focus on its branded products.

India’s biggest retail giant, the Future Group, launched a chain of *chai* and *samosa* outlets in 2005 called Chamosa Bars. But despite opening many such stores all over India, the concept did not work out – there was not enough demand. Now the company has converted these into live kitchens offering snacks, sweets, and value meals.

Despite this, these are still early days for the tea bars in India – only 40–50 of them exist in the country today, compared to around 1,800 coffee cafes – and the market is still largely unorganised, though some players have begun to organise themselves. The opportunity is clearly enormous considering the large Indian population and the universal appeal of tea among Indians of all age groups in all parts of the country.

“Consumption of tea at modern tea bars is negligible in India compared to the tea that is

“ In India, tea rules the homes, while coffee rules the streets. National chains specializing in hot beverages do exist all over the country, but they serve coffee, not tea. This is perhaps a scandal in a nation of tea-drinkers ”



Café Time Stories

By Manu Mohindra

When subtle yet elegant style meets great service or the food and the beverage compliments a design to form a tale, a concept cafe is born. This F&B style that is popular the world over has already touched the Indian shores. Now it is time for some Indian twist to this global concept

Back in the days of the Ottoman Empire, the word “qahveh” referred to coffee houses, restaurants or bars that carried a certain feel to them and provided all-day food and beverage relief. The modern cafe was formed much later, somewhere in France – the epitome of fashion, art, culture, food and drink. It is today bursting at the seams with interesting cafes that have been patronised by everyone from Hemingway to modern authors, European film stars, and artists.

Cafés have matured over the decades and reached the next level of evolution: concept cafés. These cafés are designed around a single theme or story, and all their elements – interiors, space management, food and beverage – fit into that story to form a whole entity. The story may be based on design. It can also be picked up from a real tale or could be driven by F&B, with the rest fitting in. Cafes, through history, have always had a casual and relaxed feel about them.



Today, Champs-Élysées in Paris may boast of places which Hemingway visited and therefore have an air about them, but the fact is that the patronage of the place existed because a certain comfort level, sans pretenses, was in its design and attitude. Concept cafes too carry an ease of air with the attitude they reflect, which does not minimise theme or design but simply reduces the “pretense” level. There is an element of fun, yet the menu is treated with seriousness and thoroughness.

Concept cafes distinguish themselves from coffee shops by having a theme, and not being a QSR model. At the same time, they cannot carry the “luxe level” of a concept-based, specialty restaurant. By being a mass product but with a certain style, concept cafes retain their appeal to people, driven by the ease-of-use factor. To succeed, it is important for them to have a subtlety of style, and not become gimmicky.

One of Paris’ oldest cafes, Café Procope, has been in operation since 1694! While it was opened by Procopio Cutò – a Sicilian chef from Italy – the name of the café also referred to the historian Procopius whose secret history called the “Anekdotia” was discovered in the Vatican Library and published for the first time ever in 1623. “Anekdotia” told the scandals of the Roman Emperor Justinian, with his ex-dancer Empress, and tales from his court. Throughout the 18th century, Procope became the meeting place of the intellectuals and the home of those who disseminated the scandal-gossip trade.

On the ease-of-attitude line is also Le Fouquet in Paris. With more than a century of history behind it, which included the patronage of celebrities, artists, and famous authors, this legendary Champs-Élysées café continues to be warm and inviting to all. It also takes its cuisine very seriously, with its chef winning the coveted “Meilleur Ouvrier de France” award, and ensuring that the cuisine at Fouquet – much like the place and its people – is a blend of traditional cuisine within the essence of a French “brasserie de luxe.”

And the bird has flown in all directions. Dotted across some of the finest malls of Dubai are concept cafes, taking their cuisine seriously and blending in a concept that has both global and

local flavours. I recently came across the Baby Café in Tokyo, which is a “mom and child” concept café, encouraging mothers with children under seven years of age to find their comfort and space. The menu is extensive for adults, and also carries baby food, which means food palatable for little children, as well as actual “feeds” that toddlers and younger children are given.

One of the key elements that most concept cafes have developed is that they are becoming great breakfast and all-day spaces, which conveniently acquire a pub/lounge hue once the sun sets. In other words, they retain their concept and comfort through the day but also adapt to evening preferences. There is such a café in Punjab where a single wall separates the live, display kitchen from the bar. It is a great breakfast place which also gets people through the day. It has become hugely popular for its evening character, which converts the place into a comfort pub.

From a crockery and cutlery point of view, the inventory of concept cafes is simple, without too many items or exotic elements, so as to add to the cosy feel. The table layout is simple. The take-out sections are easy to use, and often the kitchen and bar carry a hugely interactive element, allowing guests to see and pick and choose based on their preferences. Concept cafes are also a mix of F&B service and F&B retail, allowing guests to take away food too, rather than just sitting down for a relaxed meal always.

Another element to take-away at a concept cafe is the memorabilia line-up. Most cafes offer something you can buy and take away that reminds you of the experience. And for those who are



“We haven’t quite developed an ‘Indi-café,’ yet the potential of this form to take the world by storm is immense. Given the popularity of Indian cuisine, a modern café with contemporary Indian cuisine could be a huge hit with NRIs and foreigners”





It is a well-known fact in the restaurant industry that before guests eat a dish, they first savour it with their eyes. It is important for food to not only taste good but also look good. That is why the fine art of food styling is integral to creating a successful restaurant concept. How you style your food can become your USP that can keep customers coming back



The Art of Food Styling

By Bhavya Misra and Roshna Chandran

One of the things we all most enjoy about dining at an expensive restaurant is that moment when our entrée arrives, decked out in all its glory. We marvel at what the chef has wrought, and cannot wait to dig in. It might in fact be apt to say that if the presentation is excellent, the food need not be – plating food properly is that important, or nearly so. “I think food styling is one of the fundamental necessities in a restaurant’s ultimate success. It is a proven fact that non-verbal cues form up to 55 percent of all communication and a well-laid-out dish speaks volumes right from the start. Since a guest savours the dish visually first prior to actually tasting it, a visually appealing platter creates a more positive atmosphere even with the food off the mark, than the other way round,” says Zubin D’souza, Director-F&B, with the Svenska Design Hotel in Mumbai.

Ian Kittichai, the man behind the Thai restaurant Koh by Kittichai at the Intercontinental Marine Drive in Mumbai, agrees: “How a restaurant presents its food is integral to the restaurant business. Customers first feast with their eyes before they taste the food. You could have the best food in the world, but if the presentation and appearance is unappetising, people will not think as highly of the food even if it is good.”





Food Presentation in India

Scooping a ball of ice-cream and placing it on top of a brownie can be quite a treat, but certainly not enough for today's Indian consumer who is slowly being driven by visual flavours. The colour, texture, and shape of dishes, and even the choice of the platter, are crucial in satisfying consumers. The demands of Indian diners have been changing over time, so a lot of contemporary techniques have gained ground in India over the years.

Indian food, however, is considered to be one of those cuisines which are simplistic in nature and do not offer enough scope for food styling. Says Kittichai: "I think food styling has been going on in India for a long time. Chefs have well adapted to the contemporary cuisines as far as styling is concerned, but Indian food still poses a styling challenge to me because of its very nature." Adds Ashish Deva Executive Chef of Alila Hotel in Goa: "In India, more emphasis is laid on the right serving dishes to compliment the food, rather than on the food being styled on the plate itself. This is because Indian cuisine by and large is simple, straightforward, and non-fussy."



Dharmesh Karmokar, Owner of Mumbai's Silver Beach Café believes food styling and presentation in India have not picked up on a large scale yet. He however acknowledges that awareness about its significance is slowly rising. "I love the way food styling is creeping its way into Indian restaurants. The other day I went to an Udipi restaurant, and loved the way the humble 'dosa' was served to me in the shape of a wigamam tent. Give it some time and the trend will spread – this is after all the age of vanity," says Karmokar.

Sharad Dewan, Director-F&B, Park Hotels, Kolkata, says: "About 18 years back, when we were studying hotel management, we were taught the significance of food styling and presentation. Unfortunately, it was not given too much importance that time in the industry because it had to involve more organised and expensive back areas, better equipped kitchens, superior service and hardware as well as well-trained staff. But times have changed. India has not only caught up with food styling, the consumers are demanding it, that too not only in fine-dining restaurants but also in banqueting."



“Food styling is one of the fundamental necessities in a restaurant's ultimate success. It is a proven fact that non-verbal cues form up to 55 percent of all communication and a well laid out dish speaks volumes right from the start.”

**–Zubin D'souza,
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