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VOLUME FOUR • ISSUE TWO

Trade Journal for the Hotel, Restaurant and Catering Industry

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India Food Service Forum 2014

- Paving the Way for Growth and Modernisation
- Facilitating Thought Leadership
- Applauding Achievers, Innovators & Go-Getters

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India Food Service Forum 2014 - a winner all the way

It gives me immense pleasure to say that our recently concluded India Food Service Forum (IFSF) 2014 was a resounding success. Besides occupying three times more exhibitor space this year, it went beyond our expectations as regards visitor turnout and industry participation.

On the spot feedback taken by the Images team from the exhibitors, delegates and all other participants on day one and two revealed that the forum's main aim, of connecting the industry on a common and mutually beneficial platform, had been well met. For many first-time participants, the forum was an eye opener as they listened to industry stalwarts discuss challenges, issues, and trends at a series of sessions that were held in quick succession.

The event saw master chefs toss up interesting dishes, give demos on the right cooking mediums, ingredients and kitchen equipment, while at a Drinks Theatre attendees got a valuable lesson on wine appreciation. International trade bodies and associations and Indian importers were visible in large numbers.

Finally, the Coca-Cola Awards, as always, were presented to the achievers - those who had driven change, overcome obstacles, met challenges, and taken the industry to a higher level of growth. (A snapshot of the forum is presented in this issue).

I thank you for your participation and support in making IFSF a success.



Amitabh Taneja

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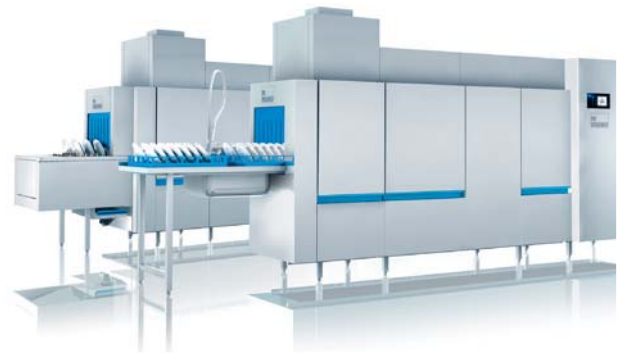
Caribbean cuisine has been influenced by African, Amerindian, European, East Indian, Arab and Chinese cuisines. Yet the region has created styles that are unique to it, with locally available herbs and ingredients

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The heart of The Corner Courtyard lies in its unique structure - a colonial era edifice which still retains the character of a bygone era

Thought Leadership

Food service operators, service providers, back-end supporters, food testing and certifying agencies, industry analysts, and other stakeholders identified the latest consumption trends in domestic markets, lent insights on business planning and growth, and shared knowledge on global best practices through a series of conferences and educative sessions monitored by the industry experts. The aim of all the discussions was “Growing Modern Food Retail by Building the Appetite for Food Consumption in India.” CEOs, policy makers, industry watchers, experts and consultants shared their insights on the business of food production in the country, trade and consumption. The “wow” experience when dining out, newer cuisines from across the world, wider variety of brands, and attractive price points are driving footfall. The country is moving at a fairly fast pace, and consumers are creating their own opportunities as they become exposed to information; hence, the challenge lies in serving this change.

Consumer in the Driving Seat Winning Strategies in the Consumer-Led Future



Top to bottom:
Shivnath Thukral
Saloni Nangia
Bhavdeep Singh

Indian retail industry is poised for an accelerated growth in the immediate future and focus on affordability, health-awareness and convenience will help the organisations succeed in the food retail industry in India.

Saloni Nangia, President, Technopak, and Bhavdeep Singh, Executive VP, US Operations, Ahold USA, discussed why these will be the game-changers in Food Retail in India.

The discussion was moderated by Shivnath Thukral, Group President of Essar Group.

Nangia charted out some key trends that would drive growth of the retail industry in India. “Affordability will be the absolute key among them and this is not only for the underprivileged class but also for the affluent class. Although the power of brands will manifest itself, the consumers will prefer lower price over brand loyalty according to the projections for 2014,” she said.

As regards the restaurant business, she talked about an interesting wave of culinary nostalgia developing in India. According to her, “Grandmother’s recipes are appealing to the younger generation, and companies are quick to tap this trend and catch the fancy of young India.”

Complementing this is another trend – regional cuisine growing national. This trend is catching up across the spectrum of the industry –right from fine dining to packaged food and condiments. At the same time, there is appreciation of Indian consumers towards authentic recipes across the world, for example, authentic burger or authentic pizza. There is a huge business opportunity in this space.

When it comes to winning the customer, “convenience will be the key parameter,” said Nangia, and predicted the emergence of companies addressing specific part of the value-chain such as delivery, order picking, and order fulfilment.

Another key trend that Nangia talked about is the continued focus on healthy eating and this goes beyond being green and organic. Consumers are becoming more conscious about ingredients, sources and nutritional information. Singh too voiced the same projections and added that the largest consumer segment for healthier food in USA is the youth in their late 20s.

Talking about the key trends he has been observing in the US market, he said, “Firstly, customer value proposition is changing drastically. While there was a clear demarcation between premium and budget consumers earlier, today’s consumer is demanding both at the same time. Secondly, the growing e-commerce business. There are already consumers in US metros who shop only online and this population is growing very rapidly. Thirdly, similar to the trend in India, the consumers are becoming more and more aware of what they eat,” he said.

As regards challenges in the Indian food retail industry, the two agreed that the key is to become cost-efficient in the entire retail operations. Singh asserted that maintaining quality of food across the supply chain is very important. Although managing fresh food is the toughest part, there is a huge potential in this space. They summed up the discussion by adding, “We have to figure out how to replicate the customer experience in food and retail. India is a huge marketplace and how we track the shoppers, engage them, and remain relevant for them constantly will be the recipe for success,” they said.



QSR – The Way Forward

Report by Pankaj Sahu and Amit Dingorkar, PGPX, IIMA'14

L to R: Gaurav Jain, Sanjay Coutinho, Samir Kuckreja, Nilanjan Bhattacharya, Ajay Kaul, Dheeraj Gupta



“Indian tastebuds are ready for international foods even in tier II cities, but importers have to go to these cities themselves because we cannot expect customers to come to cities like Mumbai to buy the products. QSRs are also fuelling growth of imported products and importers should be able to leverage on that”

– Sanjay Bajoria
Bajoria Foods

Availability of an infrastructure, supplier ecosystem, focus on quality and hygiene, and standardisation are spurring the growth of QSRs in India, concluded the panel that comprised leading players in the QSR space. The session was moderated by Samir Kuckreja, President, NRAI. A report by Crisil mentions that India's QSR market will double by 2015-2016 from 2012-2013. Currently, global brands constitute 63 percent of the total QSR market, but with a lot of domestic, regional, and new international players entering this market, tough competition lies ahead.

Gaurav Jain, CEO, Mastkalandar, said, “Bite as much as one can chew.” Their strategy is to expand to cities that can be managed by overnight journey from Bangalore, although plans are afoot to expand to Delhi and Mumbai. “The key is to not to expand out of desperation.”

Sanjay Coutinho, CEO, Baskin-Robbins, mentioned that they have 530 stores in 120 cities, and since 62 percent of their business was coming from top 18 cities, they plan to have future development concentrated in those areas. He highlighted hygiene and sanitation, especially with FSSAI coming into play, and logistics in the frozen food segment.

“Vada Pav is enjoying a huge fan following in Mumbai and Thane; the challenge lies in standardising the product and creating a brand out of it,” remarked Dheeraj Gupta, MD, Jumbo King Foods. He revealed that they were planning to reach a 1,000-store mark in 5 years. Managing franchisees would be their top challenge. “It becomes a problem when franchisees do not earn money. We have to focus on merchandising, product mix, and marketing,” he said.

According to Kaul of Jubilant Foodworks, the lack of an ecosystem for QSRs in India poses a big challenge for the growth of the industry. He recalled that when the global QSR players forayed into the Indian market in 1995 or so, the ecosystem of suppliers and service providers did not exist at all. The situation remains more or less similar even today. He felt that the unavailability of suppliers who can supply raw or semi-processed materials on a large scale limits new product development. The challenge is more on supply side rather than on demand side, he opined. Other challenges are infrastructure, trained human resources, sanitisation and hygiene.

Barista Lavazza's COO, Nilanjan Bhattacharya, hinted at moderating the level of investments in capital and optimising returns. “Over the years, Barista has realised that the real business comes from public places with a captive audience (colleges, hospitals, business parks, institutions, and malls) as compared to high streets. The challenge for the coffee shop industry lies in matching quality of product with consumer-perceived prices and in coping with rising real estate prices,” he said.

The panelists shared insights while defining differentiators for their brands, outlining the strategic space their brands were operating at. Bhattacharya attributed the differentiation to strengthening linkage between Italian-ness and coffee. Relating with photography and literature has been well received by the patrons and continues to be their key differentiator, he felt.

Jain pointed out that the “chalta hai” attitude hurts any business, and said that they are in the business of fresh food but scaling up would create challenges for them. Coutinho was of the opinion that their challenge was in churning out new flavours consistently, and in off-course distribution. While the 30-minute delivery remains the key promise of Domino's, the strategy to avoid franchising model for expansion gives a competitive advantage to them, added Kaul. “The strategy to control the entire supply chain has led to internal differentiation that has resulted in building up a unique consumer perspective,” he asserted.

For Gupta, understanding the market and aligning their strategy with the requirements was key to success. He realised that convenience is the sole factor driving the popularity of Vadapav; hence, they built their business model around it. The strategy translated into small-sized stores in crowded places, standard, hygienic products, and quick service.

The panelists agreed that employees can be motivated by making them proud of their work, and encouraging them to share ideas. They suggested that one should think global but implement local. “Customise to the local palate, but consider customer feedback.” Indian customer relates healthy to hygiene, but relating it to low-fat, low-cholesterol food might not be a good idea sometimes as customers want to indulge when eating out.

Supply's Strength & Support

The supply chain is at the heart of the economics of a restaurant and must be designed depending upon the product, the targeted customer experience, and location of the restaurant

By Manisha Bapna

In India, the 'farm to fork' chain is exceptionally long and sees too many hands-offs before the farm harvest lands in the end-consumer's basket. With so much at stake and in an economy where pulling consumers to dine out is a challenge, the restaurant industry is under continuous pressure on improving its supply chain operations. Over the past few years, the industry has grown dramatically into a \$48 billion industry and is projected to have an 11 percent CAGR over the next 5 years. Such an attractive market has attracted competition at all levels. However, it is also an industry that has been very effective in passing on costs to customers.

On a positive note, the food supply chain in India is an extremely promising sector, and has witnessed a speedy transformation over the past two decades. The sector is seeing substantial private and public investments for enhancing production, procurement, processing, distribution, and retailing efficiencies. Suppliers have expanded capacity with additional facilities in south and north India, moving closer to the raw material area in each case, and providing tremendous logistical and other benefits such as managing commodity costs better. What better example than McDonald's, which has continued to strengthen its supply chain to address such issues by expanding the farm acreage and increase productivity in the supply chain and at its outlets.

Centralised kitchen and distribution

Delivering quick meals at reasonable prices in an ever-changing marketplace is challenging, especially as food chains fight soaring fuel costs, product quality concerns, nutritional mandates, etc. The shelf life of food requires a management strategy with more frequent inventory turns from supplier to food operator to minimise costs and deliver with speed and timeliness.

In a centralised and integrated set-up, foodservice outlets adopt a hub-and-spoke model of sourcing and distribution. Products are sourced from different locations and directed to a centralised location (the hub or distribution centre - DC), from where they are channeled to the sale outlets, aligned as spokes. DCs are at the core of McDonald's supply chain where 4 DCs cater to its 300 outlets pan India with a multi-layered supply chain model with suppliers at two levels. Perishables are transported through refrigerated trucks that handle return logistics as well. In the QSR segment, Domino's, which has close to 525 outlets in India, also follows a similar sourcing and distribution model. Other formats like Lazeez restaurant have a





centralised purchase, kitchen and store. A deep link is established with adequate number of retail outlets that are fed from the base kitchen to reduce cost of operation, informs Ishtiaque Ahmed, owner of Lazeez.

Fine dining restaurant chain Specialty Restaurants Limited (SRL) has put in place a centralised supply system for perishables that are supplied directly to the nearest restaurants, which ensures consistency and timely delivery of raw materials. A restaurant chain like Chowman cannot function without a centralised system for purchase and inventory management. Says its spokesperson Debaditya Chaudhury, "Most of our grocery purchase is done within the first week of every month, and stored in our centralised dry store from where they are dispatched on a daily basis to different outlets as per their requirement. After the end of each day, a requisition slip for supplies is handed to the store manager and items are delivered the next day to the particular outlet." Murali Parna, Chief Operating Officer at Sagar Ratna, informs that they too follow the hub and spoke model where key chefs prepare the dishes (maintaining consistency and standard), which are then supplied twice or thrice in a day to their adjacent 4 to 5 restaurants.

Should restaurants go for a centralised system?

Whether a restaurant should opt for a centralised kitchen or purchasing department, depends largely on what it is offering to the customer. The advantages of a centralised system is that it helps the brand cut down costs, gain competitive advantage, improve service standards, and make efficient use of technology. Also, it protects recipes and reduces chances of copycat outlets being set up.

For large chains, it becomes necessary to have everything centralised. If the offering allows for complete or partial preparation in advance, then centralisation is a big help in lowering total costs. Typically, a centralised kitchen should be located where space is affordable, has easy access, and is able to service the city and its suburbs. Finishing of products can be done locally to deliver freshness, taste and presentation. There can be different delivery mechanisms to the outlets depending on the shelf life and volume of the items being distributed. But in India, the restaurant industry is largely unorganised, and 90 percent restaurateurs are single outlet owners for whom local best-price sourcing is the only way.

According to Rajeev Nayar, food service expert, for chain QSR restaurants, it's important to have a centralised purchase policy, but it would also depend on how big the operational set-up is. A centralised policy would help in giving uniformity to prices and in gauging market prices better, and in doing so, costs can be cut substantially as volumes would be big and the restaurateur would get negotiating leverage with vendors. The centralised system should be based on an average market price for the base products. A tender system or a contractual farming system would also be good. Of course, timely delivery to the outlets is of utmost importance.

Maintaining tight inventories

In general, the inventory planning takes into account demand and demand variation, shelf life of the product, storage facilities and finally it has to account for supplier capacity, reliability and transportation certainty. Inventory planning varies depending on the type of food being served and the level of local processing that happens. "Some categories of food products with extremely short shelf life, like dairy products, are often best managed by not meeting the full demand. So, outlets should prefer to not serve

McDonald's unique cold chain that took more than six years of setting up in India, has brought about a veritable revolution, immensely benefiting the farmers at one end and enabling customers at retail counters get the highest quality food products, absolutely crisp, fresh and at great value



DESIGN



Bringing Back The Glory

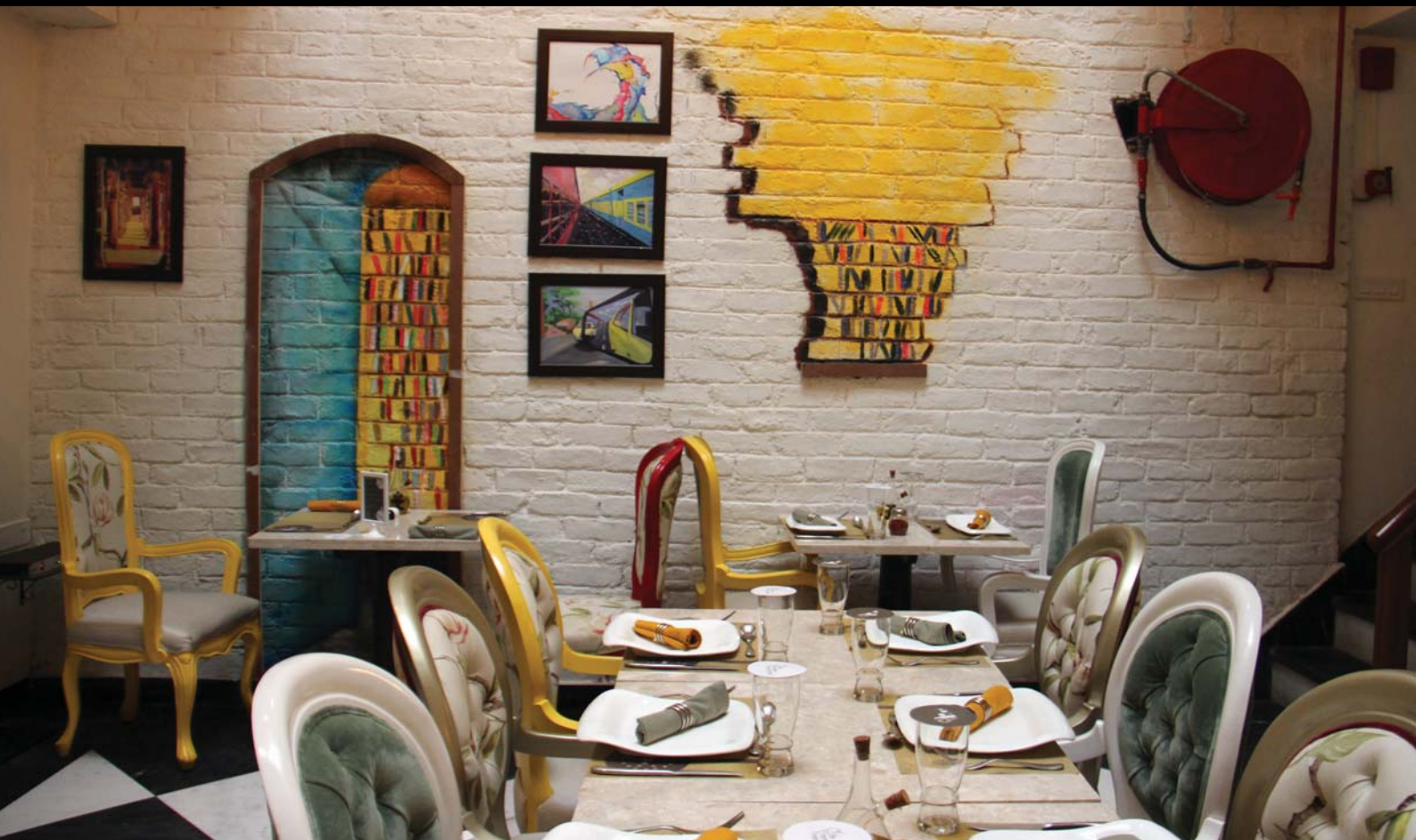
The heart of The Corner Courtyard lies in its unique structure - a colonial era edifice that dates back to 1904 - and which still retains the character of a bygone era

By Nivedita Jayaram Pawar

Humble beginnings

28-years old Meghna Agarwal always aspired to become a restaurateur one day. But that she would become the owner of a much talked about boutique hotel carved out of a 109 year colonial building? Not really.

Agarwal's first attempt at starting a restaurant went bust when she realised that the land she leased lacked a commercial license. Scarred but not willing to give up, Agarwal quit her job as a consultant with PriceWaterhouse Coopers and set out to gain hands-on experience working at the Opus - an Ecotel hotel in Bangalore. Another stint with a boutique hotel - Imperial Chai in the north east - gave her fresh impetus to take another shot at her dream of owning and running a boutique hotel.



The opportunity came in the form of an old 109 year old building owned by Agarwal's uncle in south Kolkata's Lansdowne area. "The mansion was in a terrible state. But after spending a couple of days there, I realised that the place possessed an inherent character. That's when I decided to refurbish and turn it into a hotel with a restaurant that served world cuisine," says Agarwal.

The heart of The Corner Courtyard lies in its unique structure - a colonial era edifice that dates back to 1904, and still retains the character of the past era with its wooden arches, high ceilings, and steel beams.

Retaining the glory

Converting a rundown mansion into a romantic, Old World boutique hotel was easier said than done. The team had to overcome many structural, technical and regulatory challenges without deviating from its core objective of retaining the essence and aura of a classical colonial era building.

Every contractor that Agarwal met advised her not to waste her time and money on the structure. "People told me that it's a lost cause. And that I may lose money refurbishing an old building. Also, there could be technical constraints typically associated with old buildings, and was advised to go for a new property. But that only made me more stubborn," recalls Agarwal. She was very clear that the building had to be refurbished and not broken down.

The team began with replacing the old plumbing lines. Over 55 steel beams were erected to support the structure, apart from retaining the original beams. The traditional



concrete roof was replaced with a pyramid shaped sun roof, which floods the restaurant on the ground level with ample sunshine during the day. Red oxide flooring gave way to chequered black and white flooring. "I wanted The Corner Courtyard to look and feel luxurious. You can't get away with substandard stuff by saying its Old World. People who dine here are looking for an experience," believes Agarwal.

Another challenge for the team was the natural structure of the lobby, which is divided into three sections with arched doorways. "It was a huge challenge for us to figure out how to make the place appear seamless. Moreover, the arches made it difficult for customers to maintain eye contact with the staff. But I did not want to break down the arches, so we have a 'lookout' at every table," explains Agarwal.

Space constraints led to a split kitchen on the ground and mezzanine floors. Restoration experts were roped in to restore 80-100 year old period furniture that can be seen in every corner of the colonial structure. This includes old transistor radios, world clocks, antique mirrors, old teak wood cupboards, chandeliers, door handles, and other knick knacks. They represent the heritage and cultural aspects of Kolkata, while steering away from the cliches.



“ The arches made it difficult for customers to maintain eye contact with the staff. But I did not want to break down the arches, so we have a 'lookout' at every table.”

**— Meghna Agarwal
Founder & CEO
The Corner Courtyard**



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