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Page 22
CHEF SPECIAL
GODS OF
GOOD FOOD

Featured inside:



↑ Top to bottom:
Vivek Chandramohan
Joy Singh
Gauri Devidayal
Ashish Saxena
Chef Carl Rebello

Page 40

THE ART OF SERVING TEA

Tea sommelier Radhika Batra Shah on blending tea into great mocktails and cocktails

Page 32

Restaurateur

Joy Singh's Caribbean bar concept and reggae-themed outlets in India

Page 36

QSR

Chili's American Grill & Bar is counting on its fresh American and Mexican cuisine to move ahead in India

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Consumer needs are changing along with the various parameters that go beyond the demographic profile. While the annual average spending of middle class households in India's Tier-I cities has increased by over 35 per cent on fast food restaurants in the last two years, those in Tier-II & III cities are also spending much higher on fast food restaurants. Today, more than 65 per cent of the Indian population is aged less than 30 years and exposed to international brands.

One sector that has managed to reap the dividends of this teeming demographic bulge is the foodservice industry, particularly in the QSR segment. There is an increase in the demand for QSRs, pubs and cafes as people are seeking convenience in varied formats. At the same time, the trend amongst diners to opt for cuisines that mirror their lifestyle is fast catching up. Preference for ingredients like truffles, artichokes, asparagus, Australian lamb, Norwegian salmon, black bean sauce, microgreens, organic food, etc., have found their way to Indian F&B counters. The blending of cuisines, like Italian with Thai, is another evolved customer choice and even casual dining players are offering Chinese, authentic Italian, fine French, American, Lebanese cuisine, etc., which were once considered specialty and fine-dining dishes.

To keep up with the trends, the restaurant industry is pulling out all the stops to make food more innovative and interesting. Customers are being wooed with "street food" options served in a hygienic setting and good ambience. All of this is par for the course but to keep pace with the growing demand and drive growth, the industry will have to look beyond the metros and Tier I cities to a number of Tier II and III cities, which may offer better growth prospects for players across sectors.



Amitabh Taneja

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08 MARKET UPDATE

Round up of the latest developments in the HoReCa industry.



10 EVENT

Food Entrepreneurs Unite
The Food Entrepreneurs Association celebrates its first anniversary and addresses issues faced by the restaurant fraternity.



12 COLUMN

The Cosmetics of Edible Charcoal
The use of charcoal in the preparation of baked goods for a singular black undertone.



14 DELIVERY

Delivery 2.0
How do major food delivery operators in the Middle East manage the pros and cons of the business?



22 COVER STORY



Read up on India's top chefs sharing some of their most innovative creations and inputs on the latest trends in food and experiments in gastronomy.



20 TÊTE-À-TÊTE

"Chefs should be able to take constructive criticism"
Rendezvous with Chef Carl Rebello.



36 CASUAL DINING

The Global Leader in Casual Dining
Chili's American Grill & Bar is expanding business in India by riding on the popularity of American and Mexican cuisines.



32 RESTAURATEUR

Casual Food Spaces with Foreign Concepts
Joy Singh on the unique format of his food service outlets and how Indian customers have taken to it.

40 BEVERAGE - TEA

Going Beyond Your Staple Chai
Tea sommelier Radhika Batra Shah on her purposeful signature collections and their intrinsic benefits.



44 TECHNOLOGY

In Tune With the Digital Age
McDonald's elucidates its digital strategy in France and southern Europe, and the various stages of innovation involved.



48 BEVERAGE - WINE

India's Half Full Glass of Wine
The second largest winery in India, Grover Zampa Vineyards is capitalizing on the noticeable surge in wine consumption.



52 HPMF

8th Anniversary Celebrations, Convention and Awards 2018
The hospitality purchasing fraternity gears up for the three-day event at Varanasi, India.



56 NRAI

36th Annual General Meeting
President Rahul Singh shares updates on the breakthroughs the body has made and various issues it has been pursuing.



Delivery 2.0

According to a 2016 McKinsey report, the global food delivery market stands at €83 bn, or 1% of the total food market and 4% of food sold through restaurants and fast-food chains. Growth rates vary depending on the maturity of the respective markets. For the GCC market PwC estimates the online food ordering business to reach €195 m by 2020.

The food delivery market has undergone a global transformation, driven by advanced technology options and increased smartphone usage. The Middle East has a strong culture of food ordering, thereby providing a fertile ground for new players. How do major market players in the GCC region experience the business and what are pros and cons from the restaurant operators' point of view? Bettina Quabius reports.

Strong culture of home delivery

In the region's general retail culture, home delivery is very popular, from small independent corner shops and eateries to casual dining restaurants and QSR chains. KPMG's 2016 UAE Food and Beverage report finds that three out of four survey respondents order take away or have food delivered at least once a week. This can be attributed to several factors such as the region's hot summers that prevent people from going out, the issue of mobility when high traffic in the big cities motivates them to order, or religious and social aspects as is the case in Saudi Arabia, where particularly female consumers find it more appealing to be in the comfort of their own home environment rather than being restricted in an outside place. Though the use of technology is picking up – smartphone penetration in the UAE and Saudi Arabia is among the highest in the world – still by far most common is the traditional model of ordering via phone directly at the restaurant, describing the location to the driver and paying cash when receiving the food on the door.

Among the first food online platforms to enter the GCC region was Foodonlick, launched in the UAE in 2010 by the Turkish online portal Yemeksepeti as its third market after Turkey and Russia. The company belonged to the first generation of food delivery services, so-called aggregators, that focus on taking orders from customers and routing them to restaurants, which handle the delivery themselves. Another pioneer, and today one of the most popular platforms of this category, is Kuwait-based

PAUL
depuis 1889



▲ At the moment, Azadea Group offers delivery for two of the nine international F&B brands in their portfolio, namely PAUL and Kosebasi. Pulp Juice Bars are to follow soon.

Talabat, acquired in 2015 by Rocket Internet for a stunning €150 m. Other operators include 24h or Eateasily, both based in Dubai. Two years ago, Deliveroo entered the GCC market and introduced a new type of delivery service with its own fleet of drivers and technology infrastructure. In September 2016, UberEATS launched in Dubai, expanding its offer to the restaurant business.

Providing comfort

"The approach of the delivery market in the GCC differs from other parts of the world," believes Mert Askin, President Food & Beverage of the Azadea Group. "Both, the process from the moment the order is placed until it is delivered as well as the offering is still developing and getting more sophisticated." The needs of the customers, however, are not too different from anywhere else: "Providing comfort to and an efficient and easy way for them to get the orders delivered fast and accurate, with a minimal interaction is what operators are striving for," Askin says. The Azadea Group operates nine international F&B brands, including PAUL, Eataly, Kosebasi, Butcher Shop & Grill, and manages a total of 114 restaurants in Bahrain, Egypt, Jordan, KSA, Kuwait, Oman, Qatar, and the UAE. The company offers delivery for PAUL, Kosebasi and soon Pulp Juice Bars. For selected stores they deliver with their own bikes but in most cases Azadea partners with Deliveroo, Talabat, UberEATS and several local providers, depending on the location.

"Online platforms can be compared to shopping malls," Askin says: "Being in a good shopping mall gives you access to the mall's footfall that drives customers to our stores. The same is applicable to the online platform. Additionally, running a delivery fleet, from a logistics point of view, is not the core of our restaurant operations, outsourcing this job to a third party brings efficiency in costs of fleet and operations at our scale."

Additional income and visibility

Despite generally high commissions Azadea's overall experience with the different providers is good, with each platform offering something

different when it comes to communication with customers, support on social media, e-mailers and other communication tools. The company currently considers sales from delivery as an additional income that is projected to increase and to become a main income stream in the next years. Parallel to this, Askin expects the still high costs to be decreasing as soon as more platforms penetrate the market and competition rises.

Tom Arnel, co-founder and Managing Director at Bull & Roo, the Dubai-based company behind some of the most successful and exciting newcomers



UBEREATS: FACTS & FIGURES

Headquarters: San Francisco, USA

Established: 2015

Year of market entry in the Middle East: September 2016 in Dubai

Countries of activity: Australia, Austria, Belgium, Brazil, Canada, Colombia, France, Hong Kong, India, Italy, Japan, Mexico, New Zealand, Poland, Russia, Singapore, Spain, South Africa, Sweden, Taiwan, Thailand, The Netherlands, UAE, UK, USA

No. of partner restaurants: 30,000 worldwide; 700 in Dubai

Opening hours: Sun-Wed: 8.30 am-11 pm; Thu: 8.30 am-1 am; Fri + Sat: 11 am-1 am. Ramadan hours: daily 11 am-2 am

on the city's café and restaurant scene, takes a similar view on working with a third-party delivery provider: "The online platforms allow us to target new customers and raise our online presence allowing for greater visibility. Delivery is particularly great for our outlets located in the business district such as The Sum Of Us and Muchachas Mexican Cantina." Revenue from delivery provides additional income and situations where dine-in guests have long wait times due to delivery couriers being prioritized over them do not occur. Arnel traces this back to the fact that people in Dubai are generally very accepting and understandable of the delivery phenomenon. He states: "Instead what we see is that customers are impressed when they see delivery orders, especially on mass, from a place as it shows high demand for the food."

Bull & Roo partners with Deliveroo for all six of its outlets, each of them offering an adapted menu and packaging tailored for delivery purposes. Given the overall popularity of delivery embedded in the culture of Dubai, the company believes this is a growing segment to exploit and invest in. Arnel

Best Food Forward



It is impossible to think of food and not have our thoughts flit to its creator. Food and chefs go together and creativity is the crux for a chef to bring forth diversity to the table. But it is another ball-game to strategize the path of creativity to the realm of food and cuisines. While the food scene will continue to remain dynamic, it's the creativity of chefs who concoct mesmerizing dishes and concoct magical recipes that makes food emerge as winners. To understand the process of culinary creativity, **FoodService India** reached out to a cross-section of leading chefs in India who have won acclaim and laurels for their cutting edge approach to cooking and cuisines. Turn the pages to read up on India's top chefs sharing their knowledge and tips about the latest trends in food, nouvelle cuisine, gustatory experiments, defining moments of their culinary journey, their career progression as a chef and their inputs on how to create winning recipes.



Harnessing the tandoor for quirky tikka menus



Culinary Journey: Passed out from Rizvi College of Hotel Management in 2005 and started working for Intercontinental The Grand (The Lalit) in Mumbai. Worked at hotels and brands like Sahara Star, Marriott, Hyatt, Oakwood and Intercontinental, Marine Drive.

Specialty Cuisine: Indian and Tandoor. Has also received training in Continental and Oriental cuisines.

Industry Inspirations: Chef Johern Kern, Chef Salil Fadnis, Chef Javed and Chef Satish Reddy. Believes in the distinguishing characteristics of a successful chef such as individual uniforms, skills, culinary art and the knowledge of food. Hailing from Bengal, he has infused his love for strong taste profiles and varied flavour combinations into his food.

Signature Recipes: Murgh amicha tikka, paneer jalapeno tikka and murgh jaituni tikka. Believes in authentic and fusion recipes, and likes to mix and match ingredients.

A Sunday Brunch With Family: BBQ, fish, chicken, dal and aloo bhaja. Typical home-made food in Bengali style with Rosogula for dessert.

Hobbies Outside The Kitchen: Singing and listening to gazals by Jagjit Singh.

Alternate Career Choice: Chartered accountant.



PERSONAL INSIGHTS ON

Culinary Forums: They play a major role in the development and training of a chef. Chefs are provided recognition among their peers in the industry and organizations give a stage for chefs to showcase their innovation and creativity. Forums can help in bringing up young chefs and initiating them in the industry.

Foodservice Innovation: People are changing as they travel and sample food in different countries. They know global cuisines and what they comprise. Therefore, you can't fool a guest. Bringing in new innovations according to your guest's preferences is always good but you should be transparent in your creations. As technology and advanced machinery makes work easy for the chef, he/she can focus on innovation and creating unique preparations.

Evolution of Dining Spaces: Fine dining in India has changed drastically as we can only imagine the old style of dining now. Food has also reached a level of perfection and innovation right from molecular gastronomy to fusion food. People like to try new food and they are eager. New launches in the market have a considerable consumer base to impress.

“When a painter paints a picture, we can only see it. When a chef creates a dish, we can see, smell, taste and feel it. That is what makes us artists.”

– Chef Amit Chakraborti
Executive Chef,
Goldfinch Mumbai



Joy Singh



Casual Food Spaces with Foreign Concepts

Global themes and concepts are increasingly finding their way into the Indian foodservice industry, which has been witnessing a spike in the entry of international cuisines, innovative foodservice ideas, new dining formats, distinctive food experiences and chef-curated menus. FoodService India spoke to restaurateur Joy Singh about how Indian audiences have reacted to the introduction of Intercontinental flavours at his outlets in NCR and Mumbai.

Tell us about your entrepreneurial journey in the food service business and how it has progressed over the years.

We opened our first outlet called Tarami in 2012 and it was a Kashmiri themed fine dining outlet. Within a month, we started Raasta in close vicinity. Due to some unforeseen circumstances, we had to shut Tarami down but Raasta, as a concept, has progressed since then. Today we have three outlets of Raasta in Delhi-NCR and Mumbai. In addition to these, we introduced Yeti-The Himalayan Kitchen and opened a bakery called ElPosto. The food industry has changed a lot in the last five years and people in this country have suddenly started going out to eat by way of exploring cuisines and new concepts. That is the trend that led us to believe that a Caribbean lounge or an uncommon Himalayan cuisine would sustain in the Indian market. We now have an annual turnover of Rs. 30 crore approx. and a total of over 280 employees.

List your F&B outlets and their dining formats.

Raasta has three outlets and functions as a Caribbean themed bar lounge. Yeti has a single outlet in the casual dining format and offers a purely Himalayan cuisine. ElPosto is a bakery and savory cafe cum take-away joint with two outlets.

Tell us about some innovative F&B ideas that have proved to be the most popular.

I don't think we have done anything ordinary or regular at our outlets. To start a Caribbean bar in India was a first-of-its-kind concept. Raasta, as a reggae-themed food space was also unique. My team and I have always been passionate about music and wanted to centre our conceptualization around providing people new, musical experiences. We have always wanted to make our customers feel comfortable regardless of how they are dressed or where they are from. In terms of F&B ideas, we were the first ones to introduce drinks in a bong, a glass vessel traditionally used for smoking. We also have a patent pending on that idea. This method of serving drinks became really popular and a lot of bars picked up on it. The entire Caribbean menu was a huge hit as it is



YETI, THE HIMALAYAN KITCHEN

The concept-based restaurant gives customers an opportunity to sample taste profiles from Tibet, Nepal, Jammu & Kashmir, Arunachal Pradesh, Sikkim and Upper Uttarakhand. The interiors are inspired by the Namche Bazaar in Nepal and have brick walls, prayer wheels and Tibetan prayer flags. Popular dishes include Tibetan sausages, thingmo, honey pork, thukpa, sha datchi and momos. Rs. 1,300 for two people (approx.).



somewhat similar to the Indian palate with dishes featuring pulses and rice, and biryani (Jambalya in Caribbean). The grill/tandoor section was also received really well. All these foreign ideas proved to be likable as they seemed so different yet similar in the eyes of Indian customers.

What is your strategy for addressing quality control concerns and supply chain issues that most restaurateurs face?

For quality control, there's a procedure that we follow wherein we have an in-house team doing quality and quantity checks. An outsourced team does the same and at the end of every week and both these reports are matched. The most basic and efficient way of conducting quality control is making SOPs of every dish on our menu, and asking chefs and bar managers to duplicate these and follow them as holy Bibles.

How do you manage to run and operate so many brands in different formats at the same time?

Honestly, it's the love for the service industry that is making me do this, but the one thing that is required is efficient delegation of work and providing the right kind of training to the staff or employees. These parameters help managing different formats at the same time. A proper company structure is very important for things to remain in order and that's what we follow.



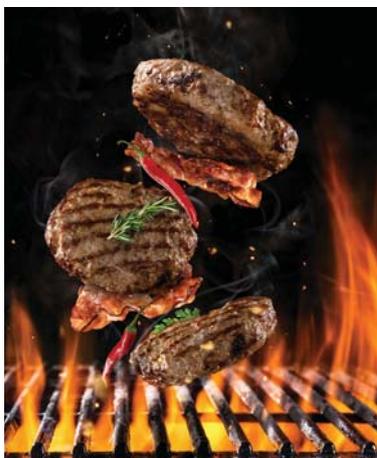
RAASTA, THE CARIBBEAN LOUNGE

The outlet has a happy, laid back and peaceful Rastafarian atmosphere. The funky bar lounge pays tribute to reggae legends Jimi Hendrix and Bob Marley. The decor revolves around quirky display items, old-fashioned furniture and art hung on the walls. Popular offerings include cocktails, mezze, jerk chicken wings, onion rings and wood fired pizza. Rs. 2,000 for two people (approx.).

The entire Caribbean menu was a huge hit as it is somewhat similar to the Indian palate with dishes featuring pulses and rice, and biryani (Jambalya in Caribbean).



Ashish Saxena



Global leader in Casual Dining

Chili's American Grill & Bar is the leading American casual dining chain with over 1,600 restaurants in 33 countries worldwide, including Canada, Mexico, Puerto Rico, Venezuela, Egypt, Kuwait, Russia, UAE, Germany, India, Japan, Singapore and South Korea, amongst others. Ashish Saxena, (Executive Director & CEO - TexMex Cuisine India Pvt. Ltd., master franchise of Chili's American Grill & Bar South and West), shares his thoughts on the chain's operations and future plans.

Please explain the positioning of Tex Mex Cuisine's brands in the India market, their USP and special features.

We own and operate the global leader in casual dining – Chili's American Grill & Bar in South and West India. Chili's is known for fresh American and Mexican cuisine served in a fun and casual ambience. You get great food, great margaritas...and more life happens here.

Globally, which are the main markets for the brand and what is the total number of outlets?

Chili's American Grill & Bar is the leading American casual dining restaurant chain with over 1,600 restaurants in 33 countries worldwide, including Canada, Mexico, Puerto Rico, Venezuela, Egypt, Kuwait, Russia, the UAE, Germany, India, Japan, Singapore and South Korea, amongst others. What started in 1975 in Dallas, Texas, with 11 southwestern-inspired dishes and trademark beverages now serves some of the best appetizers, soups and chili, salads, burgers, sandwiches, quesadillas, chicken and seafood entrees, fajitas, ribs, steaks and desserts available in India. The brand has a Pan India proliferation and Mumbai, Pune, Hyderabad, Chennai and Bangalore are the cities that constitute the southern and western markets for Chili's in the country. TexMex Cuisine is the company that owns the developmental rights for South and West India and owns and operates 14 Chili's currently.

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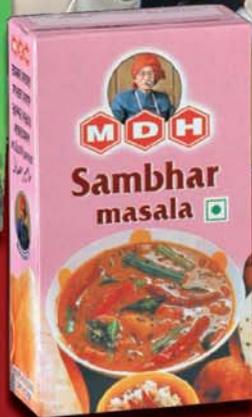
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