

THINK BIG. ACT FAST!



Niren Chaudhary
August 27th, 2012
Indian Restaurant Congress 2012

Agenda

- India – on the ground floor of growth
- Dreaming audacious dreams
- Executing with speed

While there are some headwinds to overall growth

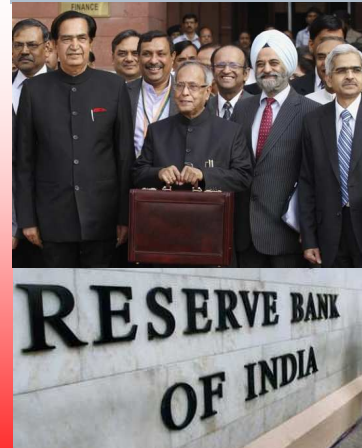
Global slowdown



Policy standstill



Fiscal challenges



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Underlying macros remain strong

Largest workforce by 2030



70% of population under 30

Urbanization



68 cities with > 1MM by 2030

Consumption led economy



60% of the GDP

Built on a solid foundation

Largest Democracy



Independent Judiciary

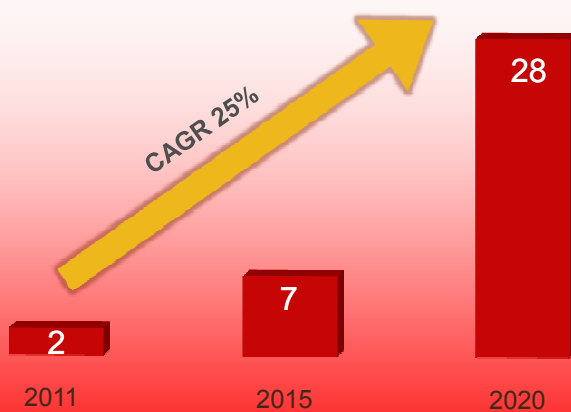


Free Press



Market for Eating Out = Huge Opportunity

Organized eating-out market (\$ Bn)



- \$90+ Billion Market
- Only 2% organized
- Frequency 1:40 days

Each category growing aggressively



Café's & Parlors
15-18% growth



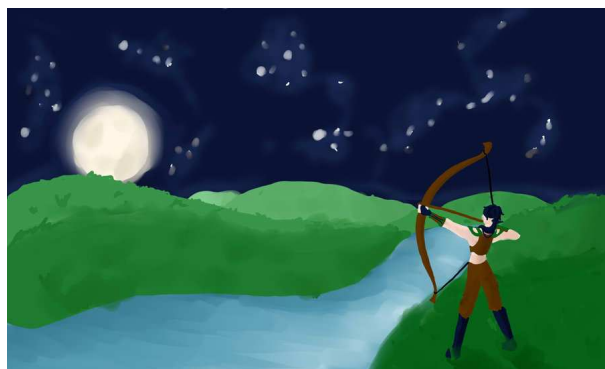
With multiple international ... and Indian brands



But only a few have cracked the code



SUCCESS comes if you...



think **BIG**



act **FAST**

“Extraordinary people visualize not what is possible or probable, but rather what is impossible.

And by visualizing the impossible, they begin to see it as possible.”

– Cherie Carter-Scott

How can we make a phone call cheaper than a postcard and usher in a revolutionary transformation for millions of Indians



Reliance
IndiaMobile
Kar Lo Duniya Mutthi Mein



- Ultra low cost tariffs (40p per min. vs. Rs.2) and handsets (Rs.501 vs. Rs.6,000 onwards)
- Dream with conviction (Unproven CDMA technology)
- Acquired almost same # subscribers in 4 months as Airtel in 8 years

How big can you dream?

Total Eating out= \$90 Bn!!

Organized Eating out

Café Category = \$150



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Build an iconic brand



Aspirational



Innovative

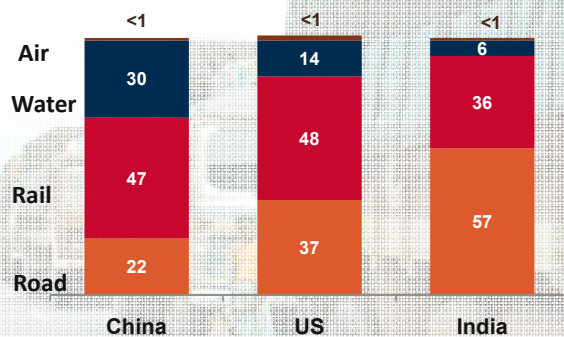


Affordable

“Business Strategy is important, but business strategy with execution is much better”

Making the impossible happen is not easy in the current environment

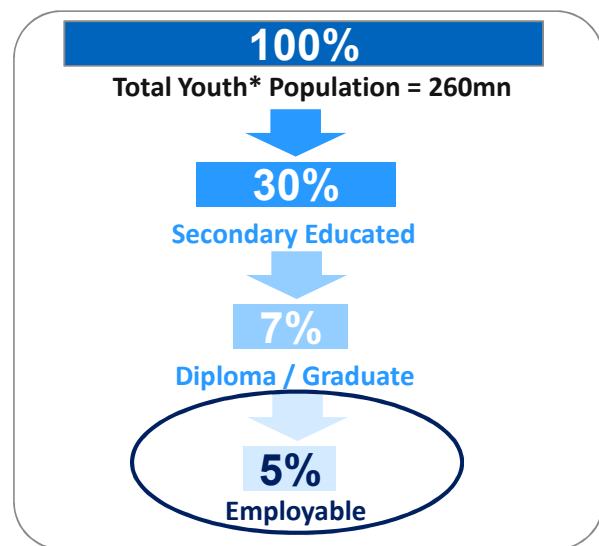
Roads continue to be the dominant...and slowest mode of transport in India



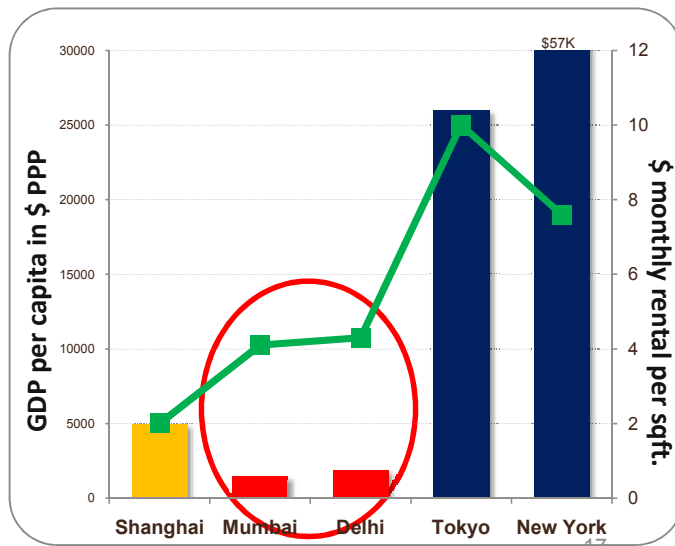
Limited infrastructure inhibits rapid growth



Working age population ≠ employable population



Unreal Realty : Delhi > New York



“A challenge is an opportunity...to build a path where none exists, and to turn a weakness into a strength. A strength that will impel you to win the war.”

– George Patton

Establish 'Next' practice

Flexible Business Model

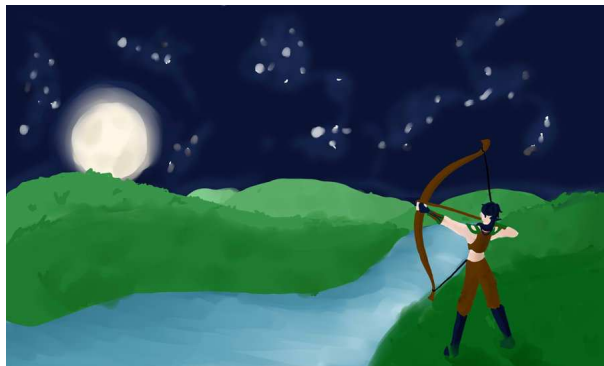


Leadership on Sustainability



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BUILD ICONIC BRAND



think **BIG**

NEXT PRACTICE



act **FAST**

THANK YOU

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Sources

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