



**JUBILANT**  
**FoodWORKS**



*Corporate Presentation*  
*November 2014*



**Overview of the Food Service Industry (FSI)**



**JFL overview and strenghts**



**Domino's Pizza –Journey & Positioning**



**Dunkin' Donuts –Journey & Positioning**



**JFL Financial Highlights**



**Experienced Team**



# Overview of Food Service Industry



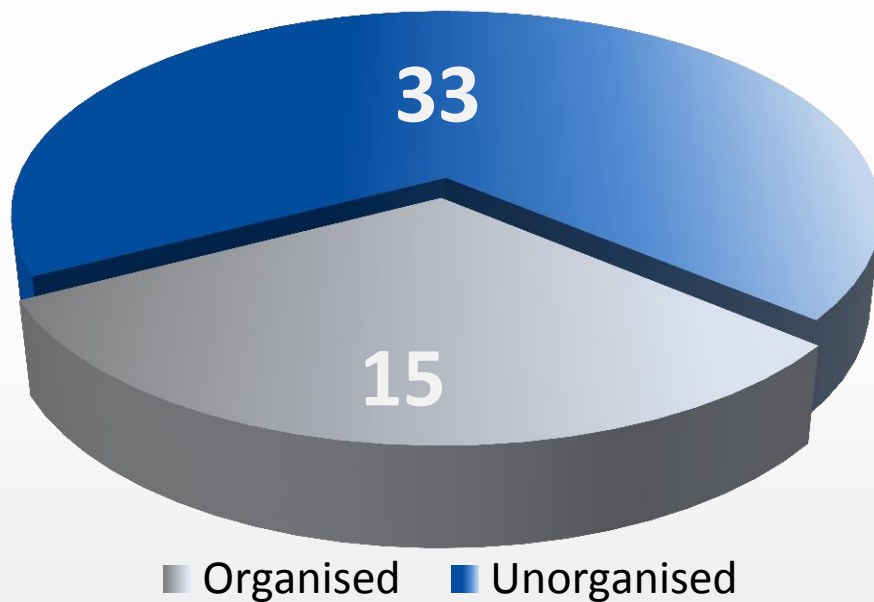


# The Opportunity in FSI (Food Service Industry)

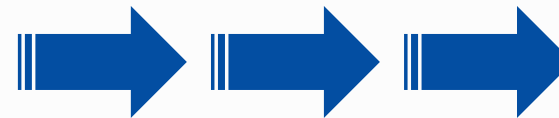


In USD Bn

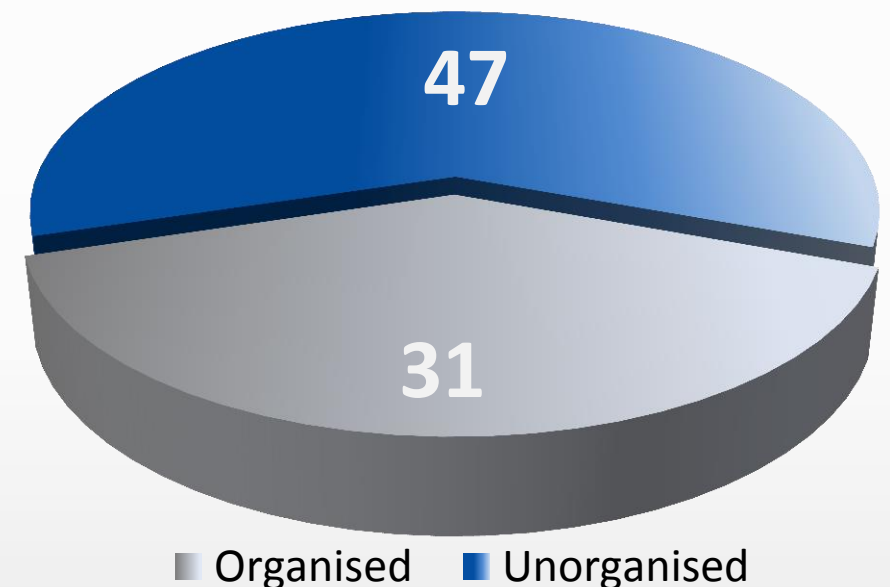
**2013**  
**USD 48 Bn**



7% CAGR



**2018**  
**USD 78 Bn**



16% CAGR



(Source: NRAI –India Food Services Report 2013)

## Organised FSI poised to grow faster

- *Higher disposable/discretionary income*
- *Higher awareness of hygiene and sanitation*
- *Rising aspiration of using branded products*



JFL positioned for superior growth on the basis of strong brands & robust infrastructure

Large consumption growth relative to emerging markets and developed markets





## Overview of JFL



**Founded in 1960**

**Domino's Pizza**

- More than 11,250 franchised and Company-owned Restaurants in more than 70 countries

- 1995

- 806 Restaurants across 170 Indian cities\*
- India is currently the biggest market for Domino's Pizza outside the United States

- Exclusive right to open Domino's Pizza restaurants in India, Sri Lanka, Bangladesh and Nepal
- Current franchising agreement till December 2024 with right of renewal for another 10 years

**Jubilant FoodWorks**

**Presence Across Countries**

**Beginning of Restaurants in India**

**Presence in India**

**Contract Details**

**Founded in 1950**

**Dunkin' Donuts**

- More than 11,000 Restaurants in more than 33 countries

- Dunkin' Donuts tied up with JFL in Feb 2011

- 38 Restaurants across 13 Indian cities\*
- Present in Delhi, NCR, Chandigarh, Punjab, Uttarakhand, Haryana, Maharashtra and Karnataka

- Alliance provides exclusivity to operate and develop Dunkin' Donuts restaurants in India. The agreement is for a period of 15 yrs (ending December 2026) with the option of renewal for 10 yrs

\* As of 30 Oct 2014

**Accumulated learning's to drive ramp-up in Domino's Pizza & Dunkin' Donuts**



Driven by Operational Excellence



Centralized Procurement & Control



Human Resource management driving growth



Project Management Competency



Cost prudence



Consumer Focus and Innovative Marketing

Accumulated learning's to drive ramp-up in Domino's Pizza & Dunkin' Donuts



# Driving Operational Excellence



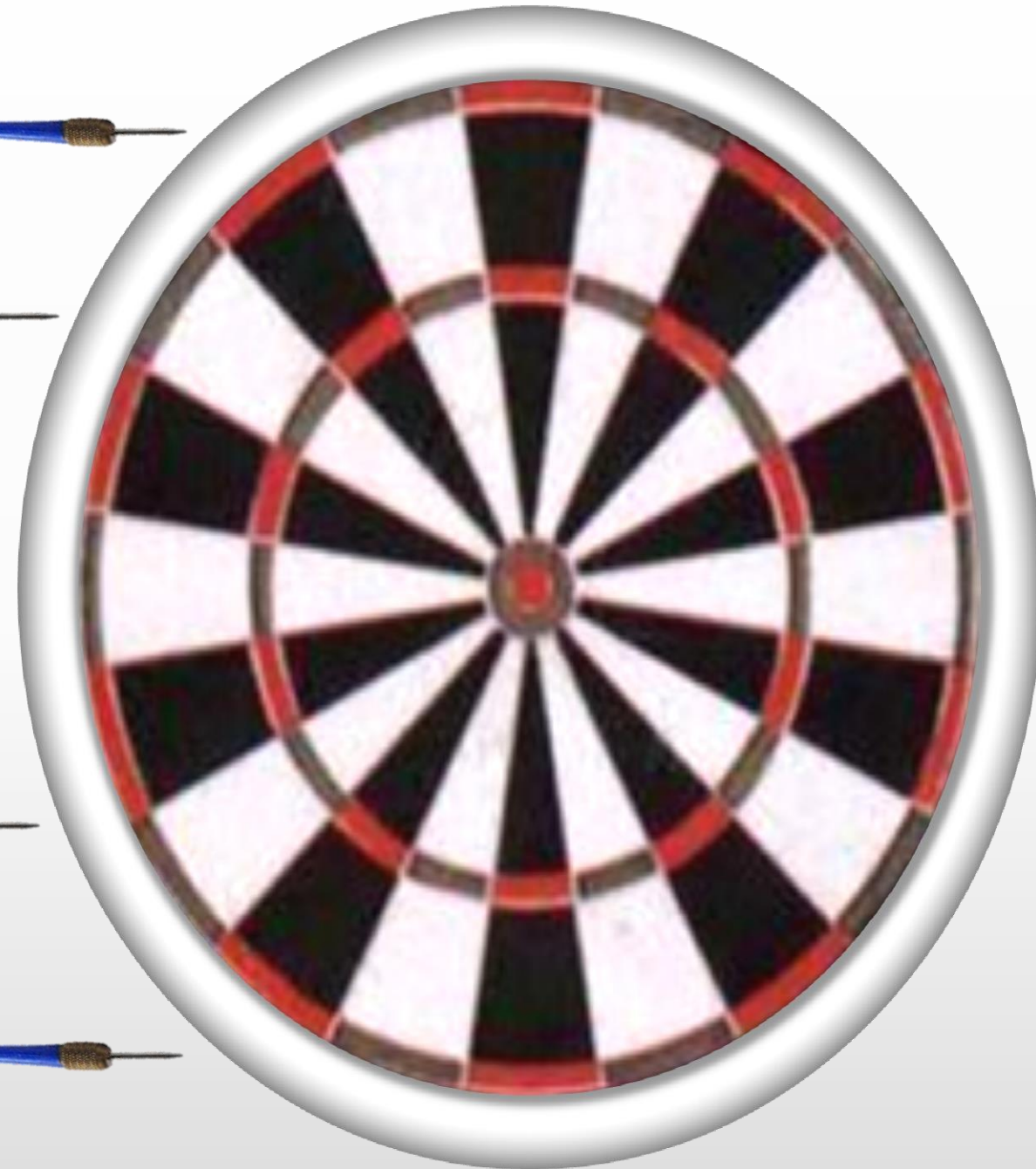
**Robust infrastructure**

**Best practices to enhance efficiencies**

**Employee rewards**

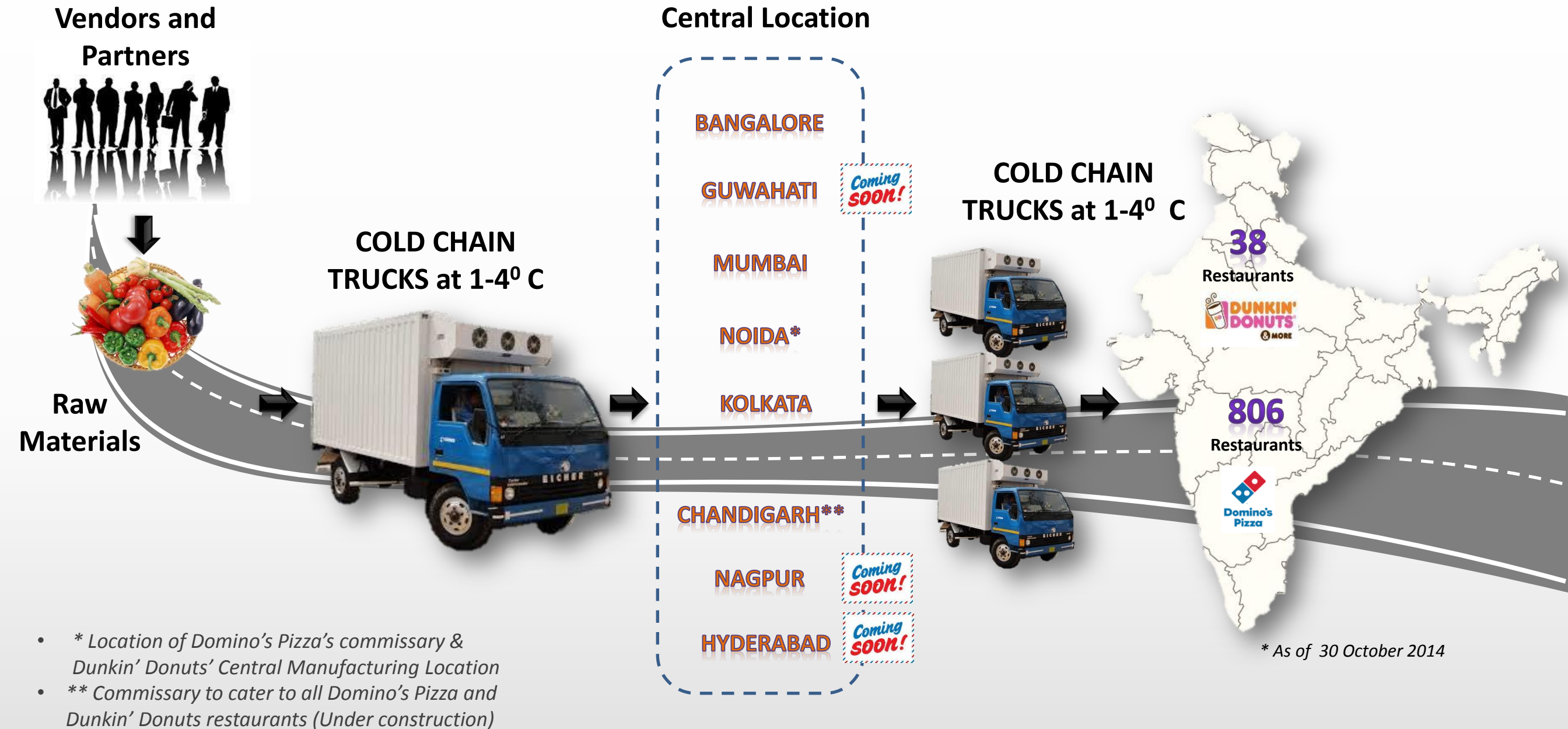
**Strong review mechanism**

**Best in class training support**



**Delivering consistency in product and services to delight our customers**

# Our robust supply chain management



A supply chain adapted to Indian conditions; well-equipped to deal with geographic and demand expansion



## We are 25000+ Ambassadors

Guest Delight  
Manager(Restaurant  
Manager is treated  
as CEO of the  
Restaurant.

Identified  
growth Path  
for every Team  
Member

Reward &  
Recognition with  
Variable Incentives  
bring motivation

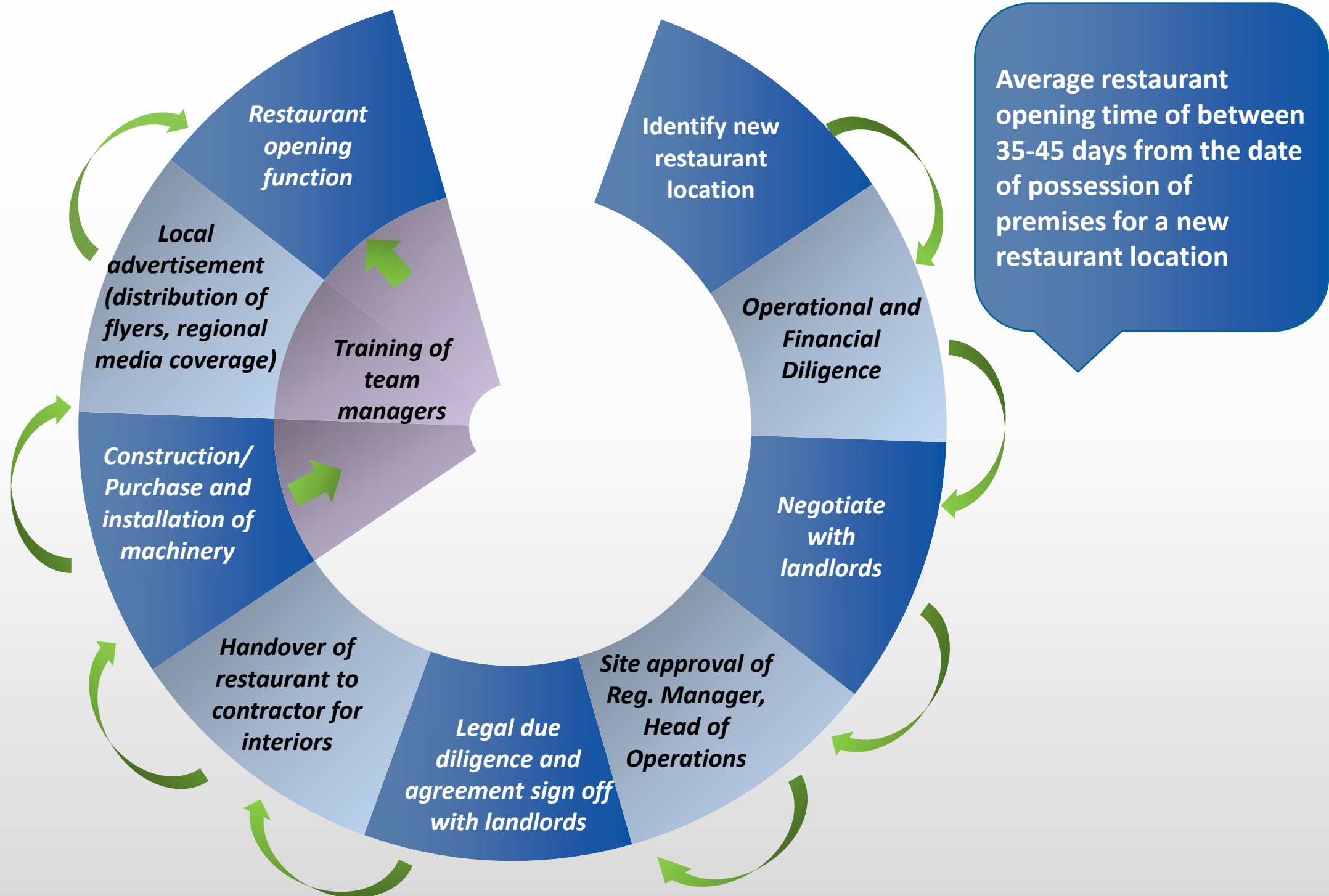
Assist Employees  
in encouraging  
excellence  
educational  
growth

Fun @ Work

Whistle Blower  
institutionised at  
every  
restaurant/office

Team members act as brand ambassador imbibing JFL's values, ethics and culture

# Site selection & Restaurant construction process



ROI/Payback period analysis undertaken prior to opening a restaurant



## National Marketing



- Television
- Print Media & Radio (including regional language)
- Innovative new product development and launches
- Emotional positioning of 'Yeh hai Rishton ka Time'

## Digital Marketing



- 6.7 million Facebook fans
- 52,000+ followers on Twitter
- 9.5 mn views for videos of Domino's Pizza India on YouTube



## Local Store Marketing (LSM)



- Door Hangers
- Flyers
- Customer lifecycle management programme
- Innovative BTL activation (restaurant targeted)

## Customer Relationship Management



- "One to one" marketing utilizes information from point-of-sales software system to provide relevant customized communication/offers to consumers



# Domino's Pizza – Journey & Positioning





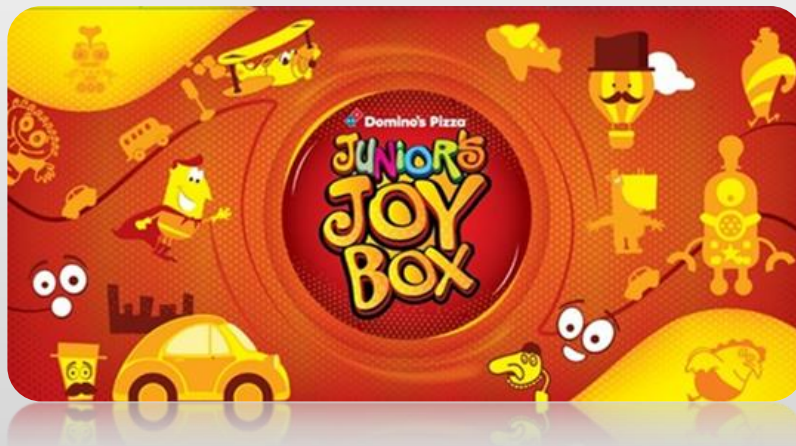
## New Product Launches



- **Subwich** - A freshly baked, butter flavoured bread with a delicious chili jalapeno, three bean Veg Patty or juicy American style herbed Chicken Patty smeared on both sides with the creamy and spicy smoked pepper relish and a layer of exotic bell peppers



- **Taco Mexicana** - A crispy flaky wrap filled with Mexican Arancini Bean Patty/ Hot & Smoky Chicken Patty rolled over exotic creamy Harissa sauce



- **Junior JoyBox** is a complete kid's meal and consists of a cheesy pizza slice, two yummy breadsticks with oregano seasoning, a delicious rainbow sprinkled custard dessert, a fruit based beverage and a toy. This has enabled the Company to successfully introduce a new gamut of audience to its universe



## New Product Launches

Fresh Pan Pizzas



10 New Pizzas



Lebanese Rolls



Spicy Baked Chicken



Calzone Pockets Veg & Non Veg





## "Pizza Theater"

### Open Kitchen-Benefits

- Its Theatric-Consumer can see the making of Pizza's
- Confidence in Hygiene and Sanitations.



### Flexible Sitting

- High stools for Youngsters
- Soft sitting for Seniors
- Long Table for Families



### Heritage Wall

- Indicating more than 60 years Old Brand





## Online Ordering



- Domino's Pizza's Online ordering creates a unique platform, to extend reach accessibility and convenience for its customers
- **Average OLO contribution to delivery sales** in Q2FY15 was around 27%



## Mobile Ordering

New online chat window to facilitate the online ordering process

Welcome to Domino's Mobile Ordering Application

Let's Get Started

Mobile#

Password

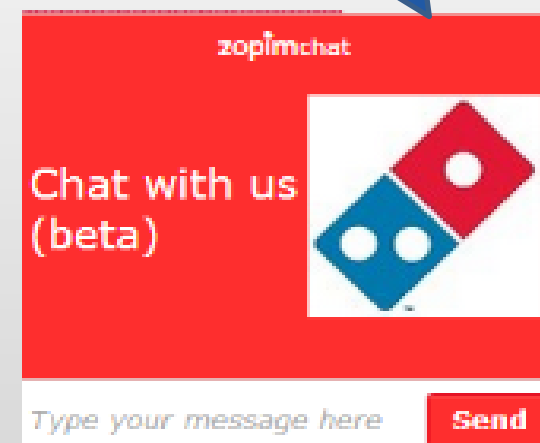
Remember me ☒ ON

Not registered with us?

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- **Mobile Ordering sales contribution to overall OLO** was around 21% during Q2FY15
- ~2 mn downloads of mobile ordering app across various smartphones



Amongst top e-commerce players in India in the QSR space



# Dunkin' Donuts – Journey & Positioning





*All Day Part Menu*





# Dunkin' Donuts-New Positioning



- Launched the “Get your Mojo Back” positioning, focused on the urban youth consumer and aimed to get Dunkin’ Donuts better placed in the sweet spot between the QSR and the Café markets
- New, evolved products with higher degree of complexity and gourmet qualities
- Positioning strategy to be further extended to entire range of offerings

**NEW TOUGH GUY BURGER.**  
**DON'T GO EASY ON IT!**

Life won't go easy on you, so why should you? Go all out with the **New Tough Guy Burger**. IT'S HUGE! IT'S RUGGED! IT'S SPICY! And it's got a strong mustardy kick that not everyone can handle. So roll up your sleeves and take life head on!

Product shown is Tough Guy Chicken Burger. Also available-Tough Guy Veg Burger.

**GET YOUR MOJO BACK!**

N.A. - Concept Store | 011-41028650 | 7A, 8A, 9A, 10A, 11A, 12A, 13A, 14A, 15A, 16A, 17A, 18A, 19A, 20A, 21A, 22A, 23A, 24A, 25A, 26A, 27A, 28A, 29A, 30A, 31A, 32A, 33A, 34A, 35A, 36A, 37A, 38A, 39A, 40A, 41A, 42A, 43A, 44A, 45A, 46A, 47A, 48A, 49A, 50A, 51A, 52A, 53A, 54A, 55A, 56A, 57A, 58A, 59A, 60A, 61A, 62A, 63A, 64A, 65A, 66A, 67A, 68A, 69A, 70A, 71A, 72A, 73A, 74A, 75A, 76A, 77A, 78A, 79A, 80A, 81A, 82A, 83A, 84A, 85A, 86A, 87A, 88A, 89A, 90A, 91A, 92A, 93A, 94A, 95A, 96A, 97A, 98A, 99A, 100A, 101A, 102A, 103A, 104A, 105A, 106A, 107A, 108A, 109A, 110A, 111A, 112A, 113A, 114A, 115A, 116A, 117A, 118A, 119A, 120A, 121A, 122A, 123A, 124A, 125A, 126A, 127A, 128A, 129A, 130A, 131A, 132A, 133A, 134A, 135A, 136A, 137A, 138A, 139A, 140A, 141A, 142A, 143A, 144A, 145A, 146A, 147A, 148A, 149A, 150A, 151A, 152A, 153A, 154A, 155A, 156A, 157A, 158A, 159A, 160A, 161A, 162A, 163A, 164A, 165A, 166A, 167A, 168A, 169A, 170A, 171A, 172A, 173A, 174A, 175A, 176A, 177A, 178A, 179A, 180A, 181A, 182A, 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# Dunkin' Donuts- New launches

**INTRODUCIN' A NEW RANGE OF MOJO GIVERS.**

 **GET YOUR MOJO BACK!**



**NEW TOUGH GUY BURGERS. DON'T GO EASY ON THEM!**

 **GET YOUR MOJO BACK!**



**NEW RANGE OF DUNKIN' ICED TEAS**

 **GET YOUR MOJO BACK!**



**Introduc'in' NEW STIRR'ACCINO**

**MORE THAN JUST A CAPPUCCINO**

 **GET YOUR MOJO BACK!**

Espresso shot of dark roast Arabica beans for a strong, full-bodied coffee experience.

Original secret blend of light roast Arabica beans for a mellow, fruity, flavourful coffee experience.



**NEW**

**Dunkaccino**

Jamaican Rum & Almonds

Mocha Chip



**LOVE DESTROYING IT.**

**THE TOUGH GUY BRUTE BURGER IS HERE.**



**INTRODUCING WICKED WRAPS**

**As warped as it can get!**

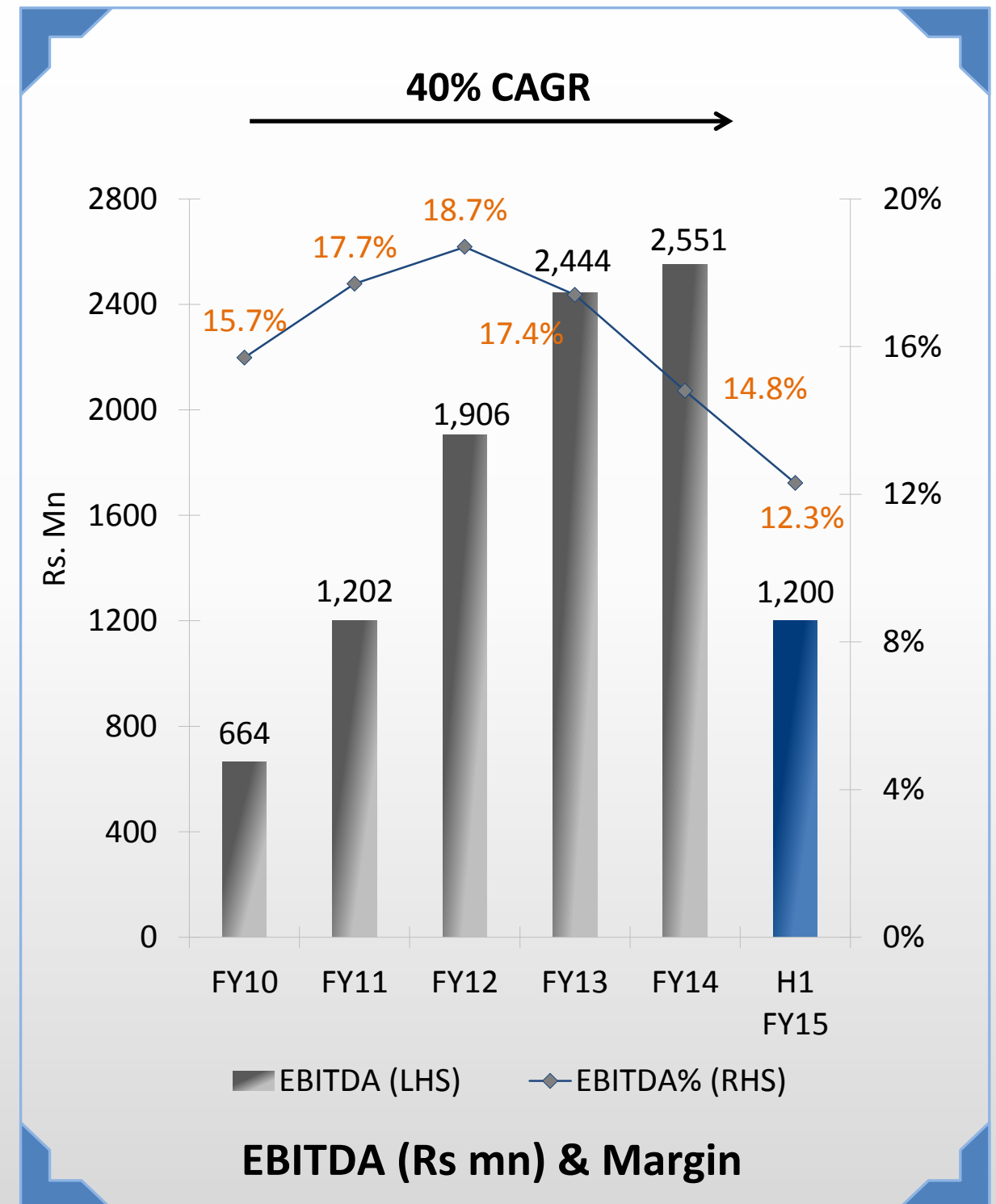
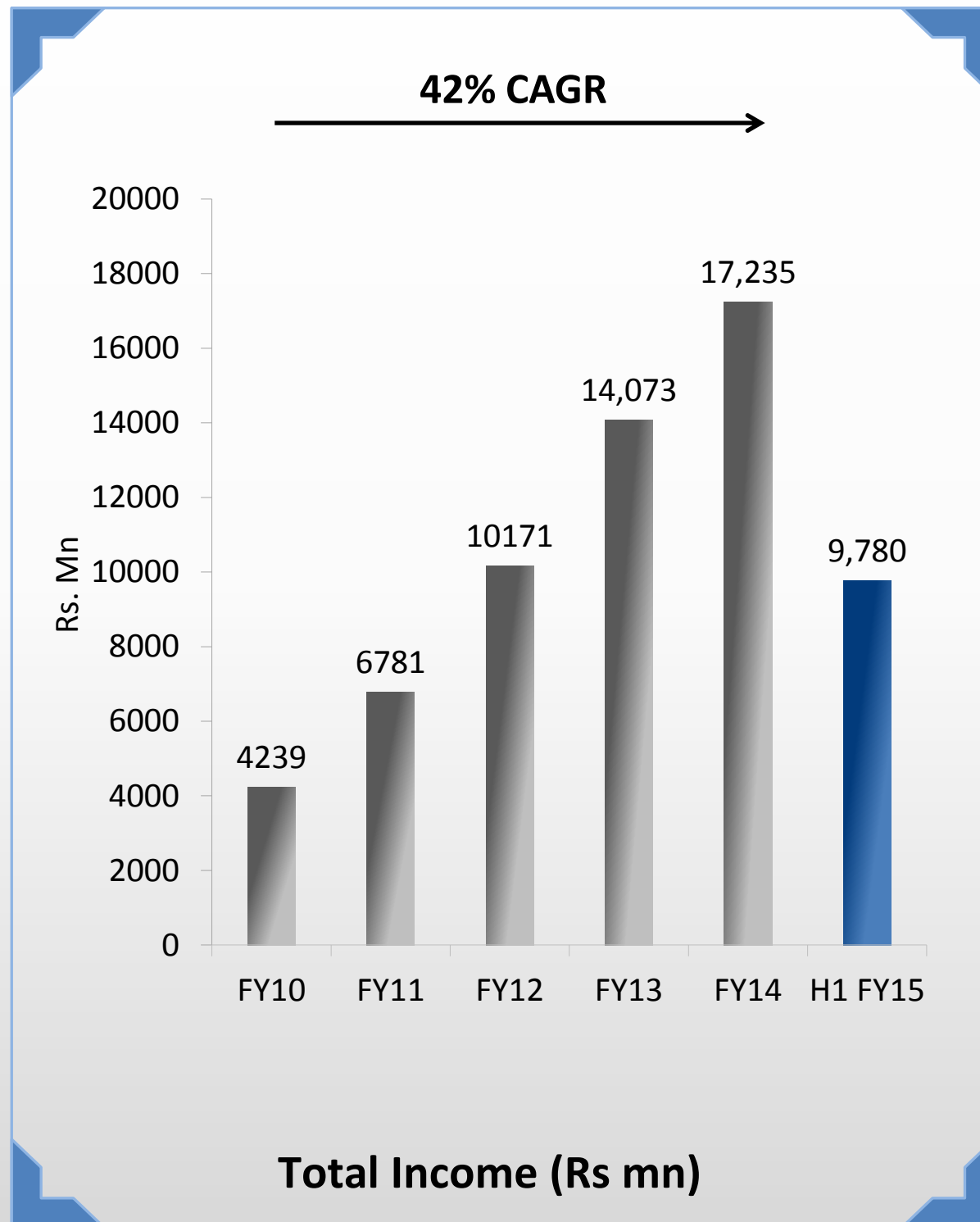
 **GET YOUR MOJO BACK!**





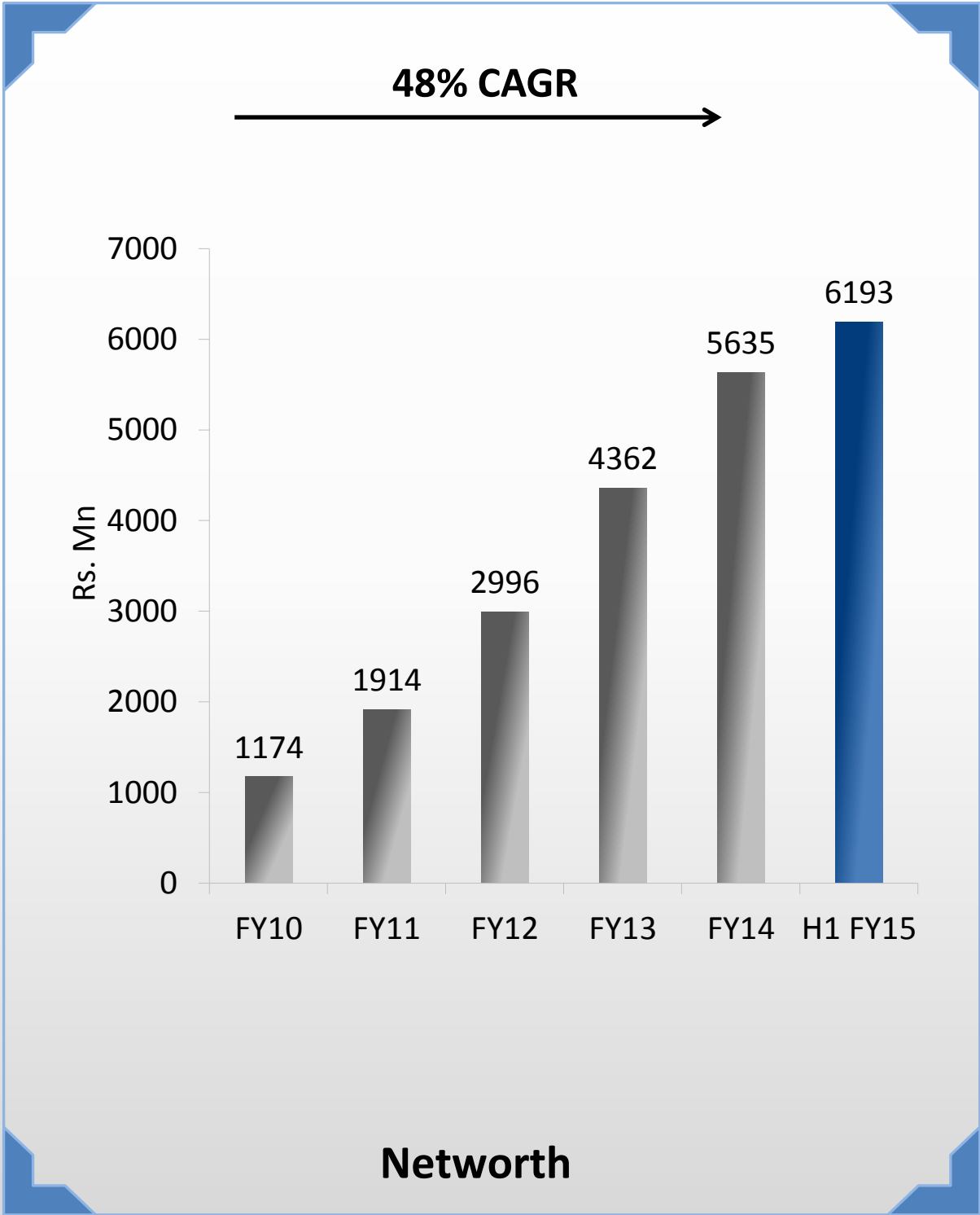
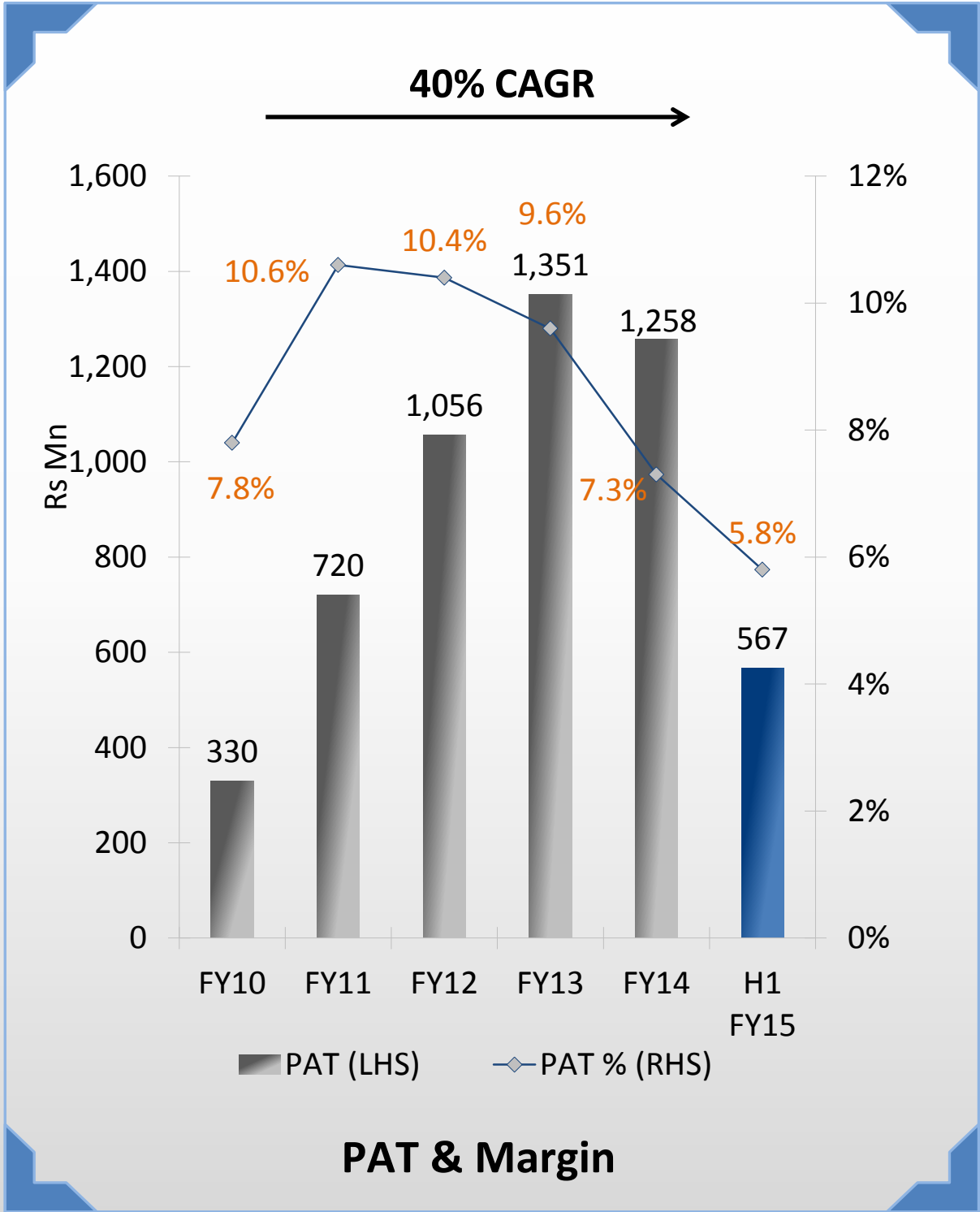
# Financial Highlights – Jubilant FoodWorks





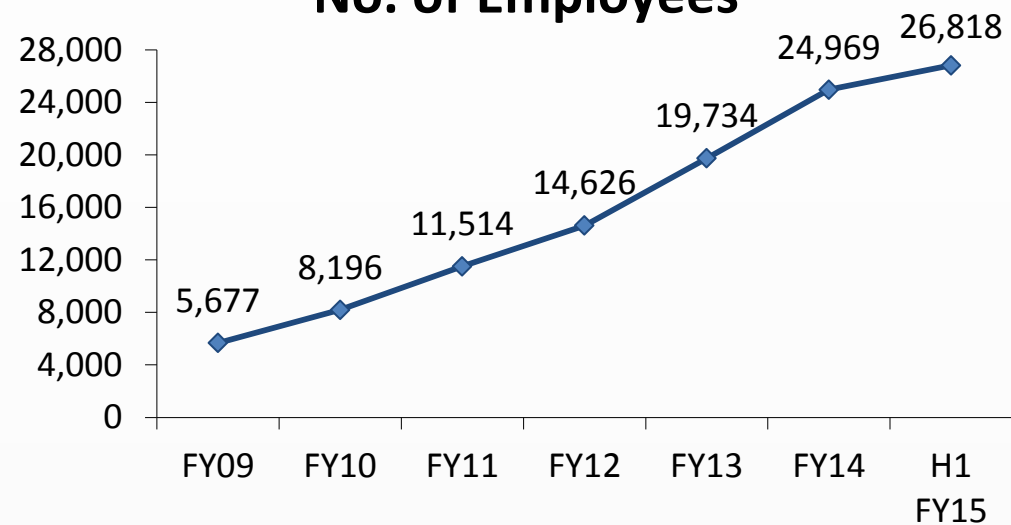
Note: 1. Financial discussion throughout this release is based on standalone reporting  
 2. The financials of Dunkin' Donuts have been included in the results & related financial discussion



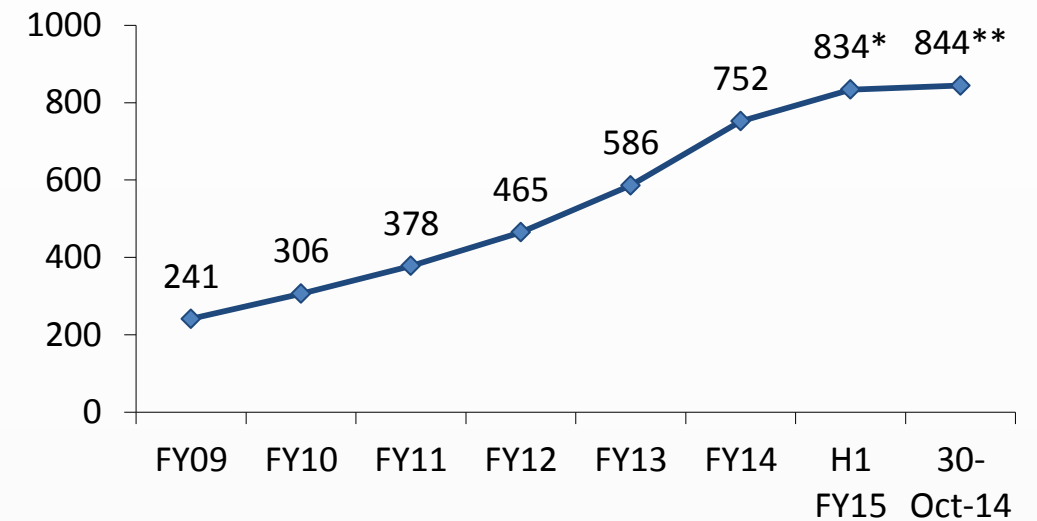


Note: 1. Financial discussion throughout this release is based on standalone reporting  
2. The financials of Dunkin' Donuts have been included in the results & related financial discussion

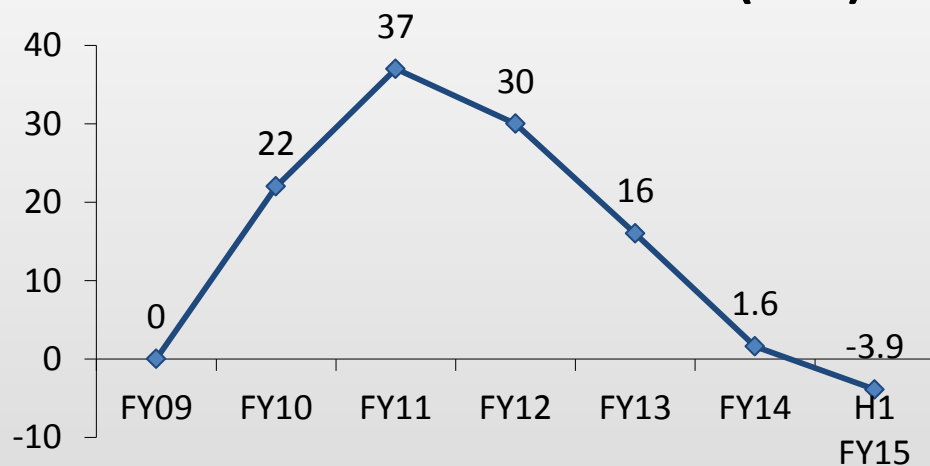
## No. of Employees



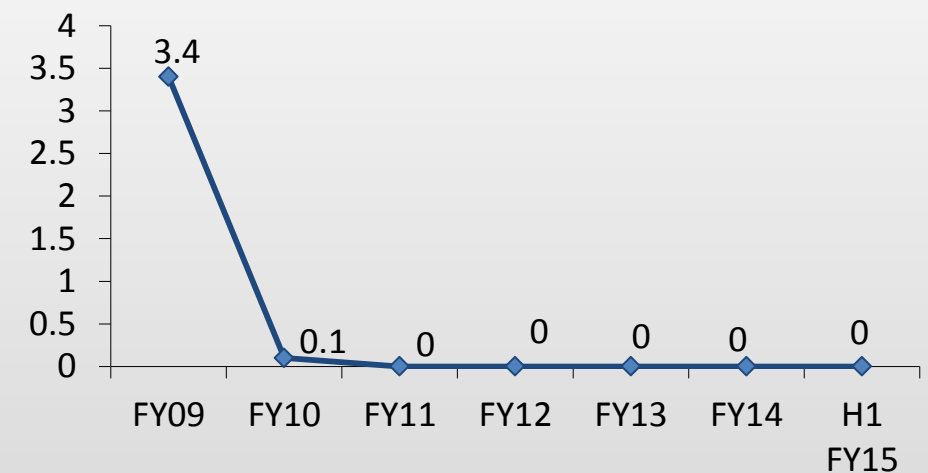
## No. of restaurants



## Same Store Sales Growth (SSG)



## Debt-Equity ratio



- \*Total No of stores includes 797 Domino's Pizza stores + 37 Dunkin' Donuts Restaurants (as of 31 September 2014)
- \*\*Total No of stores includes 806 Domino's Pizza stores + 38 Dunkin' Donuts Restaurants (as of 30 October 2014)



# The Way Forward



**Reach out to a broad spectrum of customers through an increasing network and online ordering platform**

**Enhance presence in existing and new cities**

**Dedicated efforts to drive employee training and development**

**Laser sharp focus on creating higher levels of customer satisfaction**

**Model business activities , brands & infrastructure to align with the potential in the industry**





*Thank You*