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"Consumer expectations, comparison, positioning, and performance analysis of Amul Tetra Pack Milk in India"

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Abstract

An extensive research was initiated to address the decision problem of increasing the sales volume of Amul Tetra pack milk in India. The research problems being answered in this context are "customer expectations in terms of preferred attributes of milk", "points of comparison between fresh/pouched and Tetra pack milk", "identifying market trends and target segments", "positioning and customer perception of Amul Tetra pack milk" and "performance of competitors". These research problems were further analysed by identifying and answering corresponding research questions which addressed specific product related attributes like nutrition, hygiene, pricing, sizing and longevity, specific external environmental related factors like economic prosperity, changing lifestyles, retail boom, urbanization and lastly competition related factors like market size, market share, competitors offerings etc.

Trial inhibitors for Amul Tetra pack milk were ascertained to be availability and price. Further availability and freshness factors were the main contributors to lower satisfaction leading to lesser repeat; however while the customers were largely satisfied in terms of taste and ability to cater to special needs of customers. Market share can be increased by improving the sales and distribution channel and lowering the price. Among the currently offered four variants, AmulTaaza is performing better than the rest of the variants Calci, Gold and Lite due comparatively lower costs and possessing properties of all-purpose milk. AmulLite follows next as it caters to special needs of health conscious customers. Performance of Amul Gold and AmulCalci is lagging because of low awareness and availability which needs to addressed through apposite marketing strategy for tapping existing demand and creating new demand. Trial rate of niche product type i.e. Gold and Calci can be increased further by reducing the price. Although the performance of AmulTaaza is better than others, market share can be improved further using push strategy. Address the supply side constrain by

Introduction

Amul, the largest Indian dairy co-operative, is amongst the most trusted household brands today (#1 in FMCG according to Brand Trust Report India, Feb 2013). With an extensive network expanding pan-India (nearly 50 sales offices, more than 5,000 wholesale dealers and more than 700,000 retailers) Amul as an integrated player manages all aspects of the dairy value chain, from procurement to processing, marketing (sales and distribution). In fact, the success of Amul's business model brought about a white revolution in India and made the country largest producer of milk and milk products globally. This model by Amul, also widely recognized as the three-tier cooperative structure, has been successfully replicated by other industry players to augment business value by efficiently managing the supply-chain while maintaining a very strong consumer orientation. Amul, as the leader in dairy products, offers a wide range of nearly 400 stock keeping units (SKUs) spanning across all major milk derivatives like butter, yoghurt, cheese, butter, chocolate, ice-cream, cottage-cheese and ultra-high temperature processed milk (UHT milk, subsequently referred to as Tetra-pack milk in this report). The brand identity and recognition of Amul in India is very strong, reinforced with a persistent mascot since 1967, also referred to as the Amul Girl in popular culture. Amul has been able to build and maintain trust amongst the repeat purchasers in India with its consistent quality amidst 85% industry controlled by inconsistent, unreliable and unorganized players. Milk is treated traditionally as a highly perishable commodity and the consumption pattern in India tends to have low time lag between production and consumption. Direct sale of fresh milk to customers and intermediary vendors accounts for the high majority of milk sales in India. This is then followed by sales of milk in pouches by cooperatives and private dairies, with shelf life of maximum two days when refrigerated at optimally low temperatures. The smallest share is held by Tetra-pack milk in India, which is in contrast to the other developed and developing countries. However, changing demographic patterns like incomes, urbanization and industry consolidation may mark in future a shift towards such products as Tetra Milk, which possess the qualities like longevity, quality, milk SKU variants with regards to nutrition etc. Tetra milk offers such features due to stringent production procedures like UTH treatment, addition of additives and also superior six layer packaging.

Amul had ventured into Tetra-packs domain in numerous variants named Amul Gold, AmulCalci, AmulLite and AmulTaaza. Since the Indian market is relatively nascent to buying and storing milk and demanding numerous nutrition variants, this report explores the opportunity for Amul to penetrate into this market also marred by the presence of globally renowned players like Nestle and Indian majors like Britannia, Gowardhan, Mother Dairy, Parag and Nandhani.

In India, of the total milk produced in India the informal mode of distribution i.e. about 80 % and rest of the milk is marketed through formalized channels including cooperatives. In past, the informal market thrived because people were not ready to pay extra for formal processing and packaging. However the recent trend has changed and consumers are getting more conscious about hygiene, adulteration and nutritional values. As per the data from livestock measurement management, milk production has increased from 55.7 million tonnes in 1991-92 to 127.3 million tonnes in 2011-12 (National Dairy Development Board, 2012). The 2012's figure constituted to 17 % of the global production. The per capita availability of milk has risen from 176 gram/day in 1991-92 to 281 gram/day in 2010-122 which is still less than half the global average.

Dairy Cooperatives have emerged to become the major producers of processed milk market in India. There are around 170 Milk Producers' Cooperative Unions in India. These are grouped under 15 state cooperative bodies. The major names (brands) that have entered over the past half-decade are:Amul (GCMMF), Vijaya (AP), Verka (Punjab), Saras (Rajasthan), Nandini (Karnataka), Milma (Kerala) , Gokul (Kolhapur) . Major PrivateCompanies operating in the milk market in India are: Nestle, Britannia, Sterling Agro, and Mohan Food. These private players operate in the market mainly through UHT milk and hence, there share in the

overall milk market is minuscule.

Apart from consumption of milk in its liquid form in India, it is increasingly used for other purposes as well:

• Milk exports from India have been steadily increasing at the rate of 25% in terms of volume (28% in terms of value) since 2001.

• Milk derivate like powder, butter, cheese and flavoured milk products are fast gaining significant in the market in terms of volumes.

Over the last decade the consumption of milk cartons has grown at a rate of 25 to 30 % annually as compared to less than 10 % annually for pasteurized plastic pouch. The major factors that is likely to fuel the growth of tetra-pack (UHT) milk consumption in India are:

• An increased desire for quality and convenience among the urban population

• The longevity of the this type of milk which free the people of their worries of boiling and chilling milk
• People becoming increasingly conscious about their health and alert about the food products that they consume

• Increase in disposable income levels leading to changes in lifestyle habits

Decision Problem

Suggest a strategy to increase sales of Amul milk tetra-packs in India.

Research Problems

1. What are the expectations of customers from packaged milk?

2. What are the differential benefits in tetra packaged milk vis-à-vis fresh milk/packaged milk?

3. What are the attributes perceived in Amul tetra- packaged milk at the moment? (I.e. how is Amul positioned at the moment?)

4. What are the attributes perceived in competitors' tetra –packaged milk products?

5. How do consumers perceive the different packaged milk types – tetra-pack milk vis-à-vis pouched milk?
6. Determine proper positioning for Amul tetra-pack milk for target segments.

Information Needs

• Determine the key attributes of milk from a customer's perspective.

• Key attributes of the Amul brand such as reliability, availability, hygiene, product characteristics, and value for money.

• Value propositions and consumer needs satisfied by tetra pack vis-à-vis pouched milk.

• Likely trends in the two product categories.

• Competition and substitutes for Amul tetra-pack milk.

Qualitative research

Depth interviews

Personal interviews with milk men, distributor of pouched milk, managers of supermarkets, owners of retail shops and 4-5 consumers respectively for about 20 minutes each was to help us understand:

- The changes in trends from fresh/pouched milk to tetra pack

- Consumer purchase behaviour towards Amul tetra pack as compared to competitors
- Total number of packs selling per week depending on the locality
- Product availability and sales and distribution channel for Amul tetra- pack
- Consumer's perception and search behaviour at a shop
- Expectations of consumer from tetra-pack milk
- Brand perception of Amul vis-à-vis competitors

Sampling Plan

The sample unit and response rate were expected are as per the table below:

Table 1: Sampling Plan

Target Population	Sample Unit for a Questionnaire	Expected % of response for Questionnaire / Sample Unit for In-Depth Interview	Expected Response for In-Depth Interview
People who are regular customers of fresh and packaged milk	20-30	10-15 (50%)	2
People who use Amul Tetra Pack	20-30	10-15 (50%)	2
People who Use competitor's Tetra-Pack	20-30	10-15 (50%)	2
Milk Man	NA	4	2 (50%)
Pouched Milk distributor	NA	4	2 (50%)
Manager in Super Market	NA	2	2 (100%)
Owner of Retail Shop	NA	4	3 (75%)
Commercial User like Confectionary Owners	NA	8	3

Findings from Exploratory Research

The exploratory research provided us with a fair idea about the kind of scenario that exists in the milk market of India. It was found that even today, the companies and co-operatives control a small fraction of the total amount of milk that is produced and sold in India. In-spite of being the largest player, Amul has control over just 3% of the overall milk production.

The tetra-pack milk constitutes just about 1% of the total milk sale in India. This is primarily due to people's perception of "artificiality" in tetra-pack milk. The prime reason behind this is the inability of the consumers to comprehend the fact that natural milk can be kept for 6 months. But with changing times, requirements and awareness levels people are exhibiting increased willingness to accept tetra-pack milk. Owing to this, the usage rates are growing at 20-30% annually.

The brand value of Amul is highest among the consumers and they ask for Amul as their first choice. The brand is way ahead of its competitors in major cities as Mumbai and Delhi. But the sale of Amul milk in

general (both pouch and tetra-pack) suffers majorly from supply side issues and business model. Therefore, there is big potential demand for Amul's tetra-packs which can be capitalized by correcting these supply side issues.

Findings from Quantitative Research

Factor analysis helps us group the attributes with respect to few unobservable or latent variables. The purpose of this reduction is to remove redundancy due to high correlation between variables from the data set. We can restore the entire data set with a smaller number of uncorrelated variables. Changes in ten attributes of milk mainly reflect the variations in fewer unobserved factors, for instance in our case we obtain 3 factors as shown in the workings below. Next we perform the factor analysis for Amul Tetra pack users to determine the significant factors that determine the purchasing of Amul Tetra pack.

Table 2: Descriptive Statistics

	Mean	Std. Deviation	Analysis N
Taste	3.603	0.7110	58
Consistency	3.828	0.9203	58
Smell	3.293	0.9178	58
Affordability	1.707	0.8985	58
Availability	2.500	1.2600	58
Nutrition	3.517	0.7778	58
Special Needs like Diabetic Diet	4.034	1.11542	58

KMO & Bartlett's Test

To check the appropriateness of factor analysis, we perform the KMO & Bartlett's Test. As shown in table below, the significance level is less than .05, which suggests that factor analysis is appropriate for this data set.

Table 3: KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy		0.557
Approx Chi-Square		305.517
Bartlett’s Test of Sphericity	Df	21
	Sig.	0.000

Communalities represent the proportion of each variable's variance that can be explained by the factors (the latent factors that emerge from the analysis). The extracted communalities in our analysis as shown in table below are all high, which indicates that they represent the variables well.

Table 4: Communalities

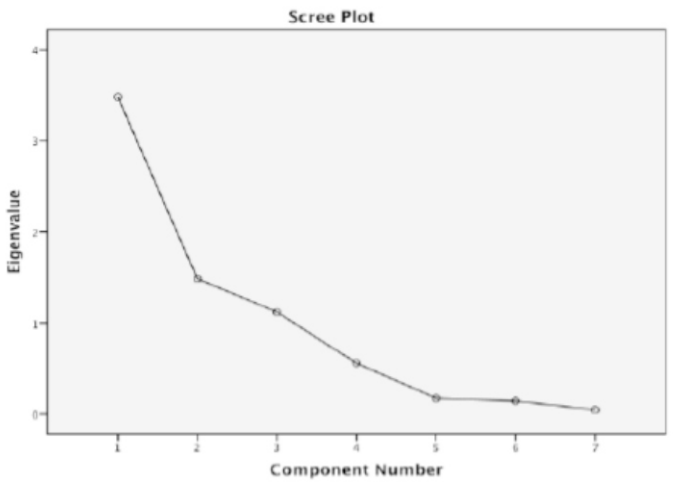
	Initial	Extraction
Taste	1.000	0.914
Consistency	1.000	0.739
Smell	1.000	0.683
Affordability	1.000	0.956
Availability	1.000	0.982
Nutrition	1.000	0.864
Special Needs like Diabetic Diet	1.000	0.949
Extraction Method: Principal Component Analysis		

Eigen values are the variances of the factors. The total column in scree plot contains the Eigen values. Only those factors are chosen which have an Eigen value of 1. This leaves us with components 1, 2 and 3.

Table 5: Total Variance Explained

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
1	3.480	49.712	49.715	3.480	49.712	49.712	3.159	45.132	45.132
2	1.485	21.210	70.922	1.485	21.210	70.922	1.724	24.622	69.754
3	1.121	16.021	86.943	1.121	16.021	86.943	1.203	17.189	86.943
4	0.555	7.930	94.873						
5	0.173	2.469	97.341						
6	0.143	2.042	99.383						
7	0.043	0.617	100.000						
Extraction Method: Principal Component Analysis									

The screen plot shown below the Eigen values for the various components.



Rotated component analysis, measures the loading (weight) of each of the 10 attributes with respect to the three components and the correlation between the attributes and the factor. Table below shows the loading on the three chosen components. Loadings less than 0.4 have been ignored in this table.

Table 6: Rotated Component Matrix

	Component		
	1	**2**	**3**
Taste	**0.865**		
Consistency	**0.810**		
Smell	**0.808**		
Affordability		**0.975**	
Availability			**0.985**
Nutrition	**0.923**		
Special Needs like Diabetic Diet		**0.781**	
Extraction Method: Principal Component Analysis			
Rotation Method: Varimax with Kaiser Normalization			
Rotation Converged in 5 iterations.			

The above table represents rotated component matrix. From the above data observed attributes can be grouped into three factors. Taste, consistency, smell and nutrition can be associated to first component. Affordability and special needs could be linked to the second component. Availability is independently derived from third component.

Factor analysis of Amul tetra pack milk users gives us three components again as highlighted above in the table. Due to the lack of optimal number of responses for the Amul Tetra Pack users, we chose to apply Regression analysis on all seven attributes to identify their relationship with overall Satisfaction level.

Quantifying the relationship between variables for Amul tetra pack users :Next we determine the predictor variables and the dependent variable for regression.

In an effort to identify the relative importance of different attributes with respect to the overall satisfaction level, we tried to establish a relationship between different attributes and consumer overall satisfaction level.

Model Summary

Independent Variables

Satisfaction level from Amul Tetra-pack milk consumption:

- Taste
- Consistency
- Smell
- Affordability
- Availability
- Nutrition

• Special needs like diabetic diet

Dependent Variable

• *How satisfied are you with the Amul Tetra Pack milk?-Overall Satisfaction*

Table 7: Model Summary

Model	*R*	*R Square*	*Adjusted R Square*	*Std. Error of the Estimate*	*Durbin-Watson*
1	*0.938*	*0.880*	*0.863*	*0.318577*	*1.945*

High Adjusted R Square value confirms the significance of our model and also shows that dependent variable depends upon the Predictor variables. Since value of Durbin Watson statistic is nearly 2, hence there is no autocorrelation.

Table 8: Residual Analysis

	Minimum	**Maximum**	**Mean**	**Std. Deviation**	**N**
Predicted Value	1.78393	4.21363	3.43103	0.807309	58
Residual	-0.385205	0.538948	0.000000	0.298374	58
Std. Predicted Value	-2.040	0.969	0.000	1.000	58
Std. Residual	-1.209	1.692	0.000	0.937	58
Dependent Variable: Overall Satisfaction					

We can see from the plot above Standardized Residuals are scattered approximately around the mean and therefore can be said to follow a near normal distribution.

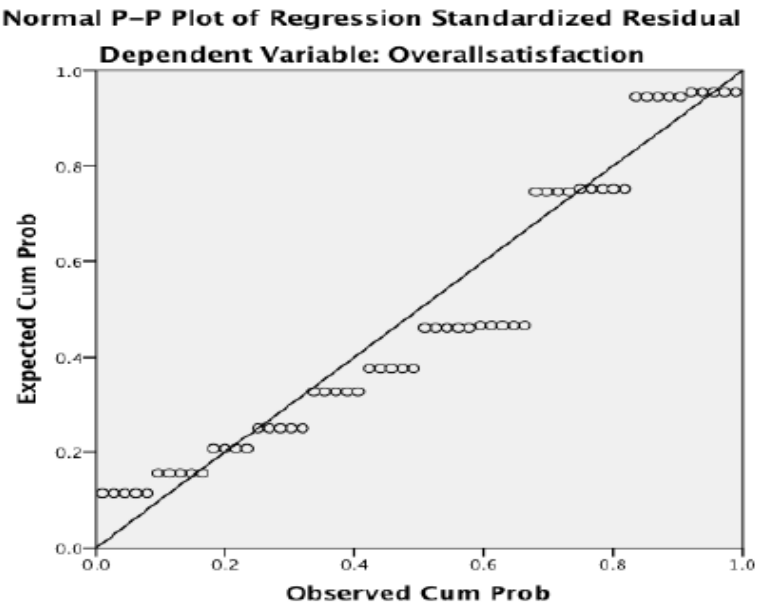


Table 9: ANOVA Test

Model	Sum of Squares	Df	Mean Square	F	Sig.
Regression	37.150	7	5.307	52.291	0.000
Residual	5.075	50	0.101		
Total	42.224	57			

The ANOVA table shows the low significance levels and high F value, so we can conclude that our regression is not flawed.

Table 10: Coefficients from Regression

Model	Unstandardized Coefficients		Standardized Coefficients	T	Sig.	Collinearity Statistics	
	B	Std. Error	Beta			Tolerance	VIF
Constant	-0.560	0.305		-1.835	0.072		
Taste	0.998	0.170	0.894	5.877	0.000	0.104	9.632
Consistency	0.35	0.078	0.038	0.454	0.652	0.349	2.863
Smell	0.187	0.076	0.200	2.451	0.18	0.361	2.768
Affordability	-0.123	0.100	-0.128	-1.233	0.223	0.222	4.509
Availability	0.534	0.066	0.782	8.130	0.000	0.260	3.850
Nutrition	0.112	0.113	0.101	0.989	0.328	0.231	4.331
Special Needs like Diabetic Diet	-0.159	0.125	-0.214	-1.276	0.208	0.086	11.645

If we look at the Standardized Coefficients (Beta), we identify certain variables, such that Taste and Availability, which contributes more to the model than other variables. High VIF values for some variables indicate there is correlation between independent variables, i.e. there is a problem of multi-collinearity in the model.

To address multi-collinearity, we removed special needs' attribute and perform the regression again. This removed multi collinearity showing that most of the users who buy milk due to special needs are much influenced by other reasons like taste and availability.

The next few tables show this regression:

Table 11: Model Summary

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate	Durbin-Watson
1	0.936	0.876	0.861	0.320535	1.978

a. Predictors: (Constant), Nutrition, Availability, Affordability, Consistency, Smell, Taste
b. Dependent Variable: Overall Satisfaction

Table 12: ANOVA

Model	Sum of Squares	Df	Mean Square	F	Sig.
Regression	36.984	6	6.164	59.995	0.000
Residual	5.240	51	0.103		
Total	42.224	57			

a. Predictors: (Constant), Nutrition, Availability, Affordability, Consistency, Smell, Taste

b. Dependent Variable: Overall Satisfaction

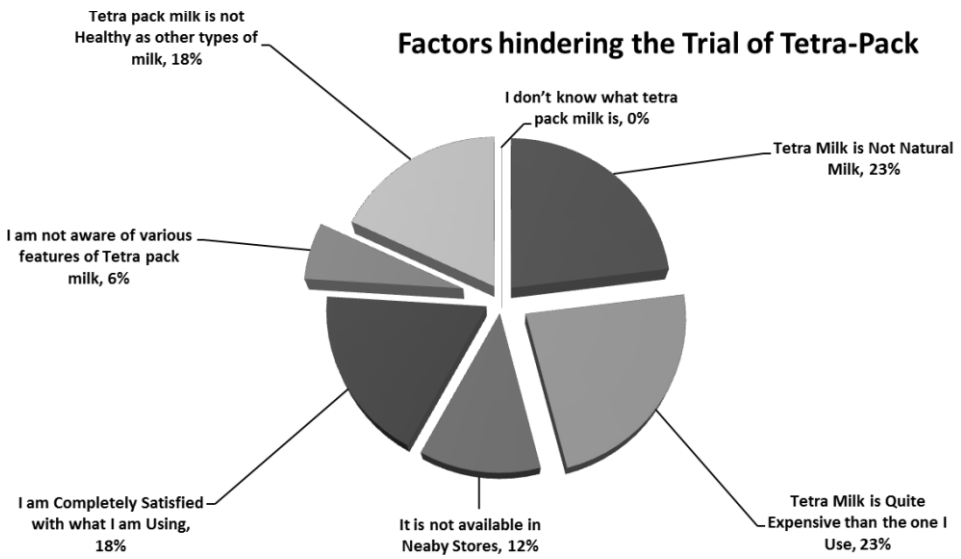
Table 13: Coefficients of Regression

Model	Unstandardized Coefficients		Standardized Coefficients	T	Sig.	Collinearity Statistics	
	B	Std. Error	Beta			Tolerance	VIF
Constant	0.706	0.284		-2.485	0.016		
Taste	0.847	0.123	0.759	6.913	0.000	0.202	4.952
Consistency	0.030	0.078	0.033	0.390	0.698	0.350	2.856
Smell	0.180	0.077	-0.192	-2.346	0.023	0.363	2.752
Affordability	0.020	0.059	0.21	.339	0.736	0.643	1.555
Availability	0.470	0.043	0.688	10.991	0.000	0.620	1.612
Nutrition	0.119	0.113	0.108	1051	0.298	0.232	4.318
Dependent Variable: Overall Satisfaction							

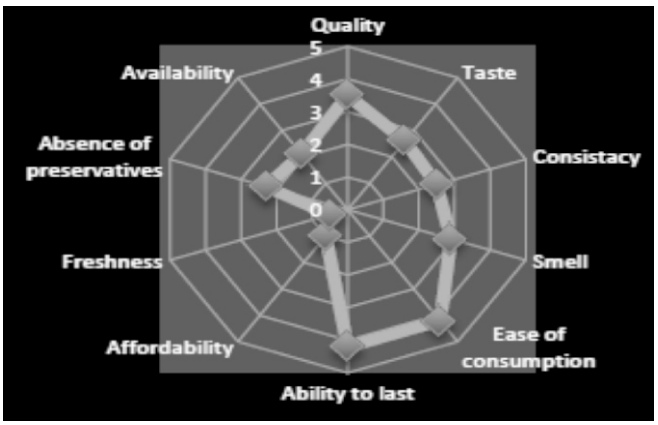
Result

Taste and availability are clearly the two most important factors considered by the consumers while buying Amul tetra-pack milk.

Interpretations from questionnaire

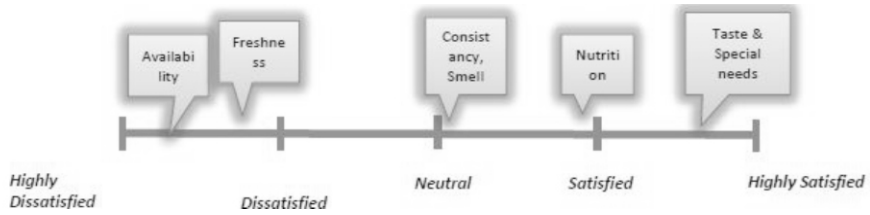


Of the 140 responses we had 60 responses who never tried tetra pack milk. High prices and lack of freshness are the prime factors preventing repurchase. This shows that the customers don't see "value for money" for the price they pay for tetra pack milk. Presences of preservatives which is perceived as "unhealthy" also prevents repurchase. Tetra pack is marketed selectively and hence, distribution also prevents repurchase. There is dissatisfaction also with the taste and consistency of tetra packs. In general, users seem satisfied with the quality, ease of consumption and ability to last for the tetra pack and hence, these attributes seem to be the ones which can be differentiators with respect to other "types" of milk.



This also reinforced our pre-test results by providing an additional reason to remove the attributes; quality, ease of consumption and ability to last, which were not areas of improvement for tetra pack milk in general. Lack of freshness also indicates that there might be brands which don't provide fresh milk, which might be diluting the equity of tetra packs in general.

Please mark your degree of satisfaction from the brand(s) consumed (for tetra pack) based on the various attributes.

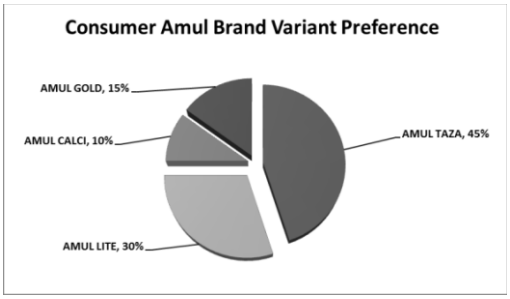


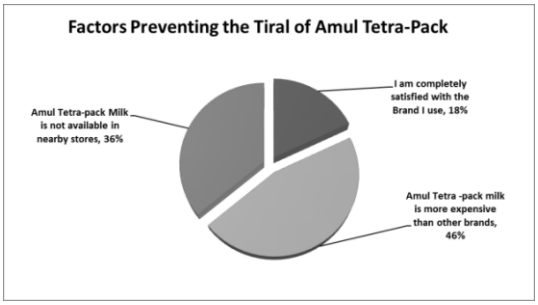
Those who had tried Amul tetra pack milk in the past, but didn't go for repurchase seemed dissatisfied with the availability and the freshness of the milk. These seem to be the prime reasons leading to low repurchase. Both these factors also figure prominently in the reasons for not repurchasing tetra packs in general as well. Respondents seem satisfied most with the taste, smell and fulfilment of special needs which can be a point of differentiation for Amul. Amul is also viewed favourably amongst respondents in terms of consistency and nutrition, which indicates that the overall brand perception is favourable.

If you have never used Amul in the past and are a tetra pack milk user, why have you never tried Amul?

The major factors that prevent the trial of Amul tetra pack amongst tetra pack users are predominantly the

lack of availability and high price point. These are consistent with the expert opinions and account for about 82% of non-trial. An interesting insight is that only 18% of the users are fully satisfied with the brand (non-Amul) they are using. This indicates that at a lower price point and with better distribution, Amul's trial could be increased and due to dissatisfaction with the current brands, can lead to increased penetration and market capture.





The positioning of the various variants can be clearly visualized from the responses.

AmulTaza which is the cheapest variant and positioned as all-purpose milk for everyday usage is the most preferred brand (45%). This also confirms the fact that high prices are a deterrent to the adoption of tetra pack milk and everyday variants should be cheaper.

AmulLite positioned as milk for health conscious and marketed as almost zero fat milk, is the second most preferred variant. While this is catering to special segments and has a smaller target audience, 30% of the respondents still preferred it, indicating its well positioned stance.

Amul Gold is the next most preferred variant (with 15% of the Amul users using it) amongst the respondents and its POD is its cream and consistency. This matches up with the interviews with experts that believed that the usage of Amul Gold is for special needs like making sweets and different preparations. Since it is used only for special preparations, and hence used mostly on special occasions, its market share seems to be lower.

AmulCalci, targeted towards working and retired women, in general, was attributed as a preferred brand only by 10% of the users. Since the target population is small, 10% might be a fair share of the market.

Following are the major reasons as to why people purchase different variants. The figure that follows provides the preferences of different variants among different age groups.

Based on the demographic information we get the following segmentation

Table 14: Amul Milk Brand Portfolio and its Target Segments

Product	Segment	
	Age	Income
AmulLite	14-25	High Income Group
Amul Gold	35-55	High Income Group
AmulTaza	20-50	Medium Income Group
AmulCalci	40-70	Medium Income Group

In general, tetra-packs are used by higher income groups as compared to fresh milk and pouch milk. This

can be attributed to the higher price point.

Perceptual Map

A perceptual map is made for affordability and availability. Amul has the opportunity to move into the high availability and high affordability where currently no player is operating.

Conclusion

Answers to Research Questions

1. What are the expectations of customers from packaged milk?

• Prices should be lower

• Physiological factors like smell and taste should be close to natural milk

2. What are the differential benefits in tetra packaged milk vis-à-vis fresh milk/packaged milk?

• Convenience in terms of easiness of usage and storing

3. What are the attributes perceived in Amul tetra- packaged milk at the moment? (I.e. how is Amul positioned at the moment?)

• There is perception of high quality

• Taste is considered to be better among the available options

4. What are the attributes perceived in competitors' tetra–packaged milk products?

• Competitor's tetra-pack milk is considered to be cheaper vis-à-vis Amul.

5. How do consumers perceive the different packaged milk types – tetra-pack milk vis-à-vis pouched milk?

• Tetra-pack milk is not considered natural milk. At the same time, it is perceived costlier. In essence, consumers perceive high cost for lower quality.

• They also believe that freshness is missing in tetra-pack milk

6. Determine proper positioning for Amul tetra-pack milk for target segments.

• AmulTazaa, the cheapest variant, has the best sales. This is in line with its positioning as general purpose milk.

• Amul Gold and AmulCalci are positioned as niche products due to which their sales are limited.

• AmulLite is positioned as a zero-fat content milk and has found fair amount of acceptability among its users.

Therefore, the positioning of the various variants is correct in terms of the target audience. However due to higher price point, there is less adoption by the users. Hence, prices should be slightly reduced to increase trial and market share. Also, the benefits of the various variants should be communicated via more aggressive media promotion.

Recommendation

Since physiological attributes related to milk are an important attribute, it would be difficult to bring into fold the customers who benchmark tetra pack milk with respect to fresh milk. However, the target segment which has not adopted tetra pack milk due to price sensitivity can be pulled to adopt it by moving to a lower price point.

Price reduction should be done on Amul Gold and AmulCalci so as to induce more trial and repurchase by the targeted niche segments.

Availability issues restrict sales prominently. This is due to a lot of retailers not stocking it because of demand of ready cash by Amul and inconsistency in supply. This can be addressed by incentivizing retailers by extending credit for a few days and stock returns within a specific time frame.

Taza if marketed well has achieved fair amount of sales. It should be promoted as substitute for other "types" of milk which emphasizes its quality and addressing the issues of availability.

The demographic that is currently using tetra pack milks is SEC A and young. This segment is a regular user of Internet. Thus, an online portal for ordering and delivering tetra pack milk should be introduced in tier 1 cities.

Different marketing communications and promotions with specific emphasis on the features that each of the variants has, should be aggressively pushed.

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