

RAZMIN by Qureshi Enterprises: Competing with the Secret Sauce of Competitors

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Abstract

The case is comprised of the entrepreneurial venture of Mr Fahim Qureshi, who visualized the opportunity for growth and marketability for food, beverages and various FMCG products in Pakistan by organizing the scattered demand. He established QURESHI ENTERPRISE (QE) in 1997. Mr Qureshi believes that his deep knowledge of the consumer market, compounded with financial strength and other capabilities provides ample opportunities and further scope for expansion and with this, in mind, he created his brand “Razmin”. The brand is for numerous culinary products, like corns, curry pastes and a wide range of sauces. All these items are manufactured, packed and branded in Thailand.

Keywords: *Competitors, FMCG, Qureshi Enterprises, RAZMIN*

JEL Classification: *P13, P31*

THE SITUATION

Fahim Qureshi never expected testimonial and recommendation of opinion leaders as very strong hidden persuader that affect the behaviour of culinary consumers (Zhang, 2015). Further, he never expected the higher cost of testimonials and convincing opinion leaders to recommend the brand on the basis of quality (Park, 2017). To his surprise, the norms of the industry are different (Dong, 2017). The culinary market can be divided into two broad categories (Yao, 2017; Qureshi, 2016). One segment is dominated by international brands like American Garden, Surrey, Mamasita etc. and another segment is dominated by local brands like Shangrila, Keys and Mitchels etc. (Exhibit 2). Ketchup, mayonnaise and herbs are the most important sauces, dressings and condiments in terms of consumer preference and value in Pakistan. Herbs and spices held the largest value share of 74% in 2017.

There are different types of dominant consumers, the household and Business to Business (B2B) (Nazir, 2012). Razmin successfully pushed its brands in the stores. It is also supplying its product to famous restaurants and hotels (Exhibit 3), however, the company believe that the brand potential is much more than what it is getting due to its highest quality and value for money. Being qualified as the highest quality of sauces, the company found itself behind

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the brands that are not at par with the quality of Razmin brand of sauces imported by Qureshi Enterprises. The company is figuring out strategies to win consumer preferences through quality, hygiene, and value for money. However, Qureshi found that consumer behaves unexpectedly different when it comes to buying culinary products (De Mooij, 2019).

To his surprise, he came to know that consumer thinks of different brands as same and the difference is only price and brand name (Davcik, 2015; Gómez-Suárez, 2016). Many consumers even do not associate the culinary products with taste but they use it for colour purposes. All these insights convinced Fahim Qureshi that the brand cannot gain momentum through typical TVCs and unique set of strategies is required to follow to make the brand a leader in a culinary market. He decided to go for in-depth market and consumer insight before arriving at any decision regarding the marketing of Razmin brand. For this purpose, Fahim Qureshi contacted a renowned business school of Karachi to conduct thorough research for them. The research should include the insight of housewives through detailed discussion, Mall intercept surveys, collecting insight of chefs at the famous restaurants of Karachi, and observing the buying behaviour of consumers in retail stores and malls.

The behaviour of Culinary Product Consumers

The average Pakistani consumer spends 42% of his income on food. Consumption of imported food is greater in urban areas because of high disposable incomes and affordability to a modern lifestyle (Osman, 2014). A typical Pakistani household makes regular purchase of staple food several times per month (Ali, 2010), but when it comes to these sauces they are purchased once in a month or once in two months as mostly Pakistani dishes are made in a typical manner. The consumer insight revealed that many consumers do not think of the culinary product as different from one another and for many the dominant purchase decision is therefore price. It is however also a known fact that consumer does associate imported brands of sauces as more safe, hygienic and trusted. Affluent Pakistani families are attracted to imported brands (Akram, 2011). Their choice is particularly driven by the exposure they have towards foreign cuisine. Some of the imported brands have well-established recognition like American Garden, Mamasita and Suree. Razmin competes with imported brands but still have strong competition in terms of brand recall and recognition. The survey conducted showed very few consumers were actually familiar with the brand. Mainly people preferred American Garden, Shangrila and Surre.

COMPETITIVE LANDSCAPE

American Garden

American Garden is a US-based company and is among the highest sold brands of imported culinary products in Pakistan. It has above-average brand recall and consumers in Pakistan associated it with the quality and status. It is also one of the oldest brands around in Pakistan that is introduced in the country twenty years ago. Due to high availability, American Garden enjoys strong recall and recognition and is the undisputed leader in major cities of the country in imported brands of sauces and culinary products. The brand is also known for its attractive packaging design. American Garden offers a wide range of products that include condiments, canned food, sweet treats, and kitchen helpers. Condiments include; hot

sauce, BBQ sauce, vinegar, pizza sauce, jalapenos, Worcester sauce etc. Being in Pakistan for many years American Garden understands the food preferences of Pakistani consumers. Their brands are tailored according to the taste buds of Pakistani consumers. Therefore, their products are more spicy and tangy. The company follows the changing trends and understands rapidly changing consumer food preference due to fast food trends; therefore, the company is offering Bar B Q and pizza sauces. Their brand strategy is to provide high-quality products that offer original flavours and recipes from around the globe but with affordable prices. Their success is an outcome of understanding the market dynamics in terms of taste preference of the people in the region. Since the brand has been in the Pakistani market for over a decade, it has instilled a strong foothold in the market and has loyal consumers in both B2C and B2B segments.

Suree

It is a Thai brand which was established in 1995. Suree products are sold in 54 countries around the globe. This brand has taken the Pakistani market by storm. Suree has a notable presence which is a result of the endorsement of a well know celebrity chef Shireen Anwar hosting a cooking show using recipes that include Suree cooking sauces as a vital ingredient. The show was aired in 2015 and since then it is a huge success. Their users consist of mainly the huge number of audience that is engaged through the live cooking show by the famous chef. The idea of product placement sits well with the objective the brand wants to achieve. It has not only given recognition in the mind of the consumer but also has persuaded them that their dish would be incomplete without Suree. The show is successfully projecting the sauce as the vital ingredient to bring life to their particular recipe.

Shangrila

Shangrila introduced its seasoning products in 1998 in Pakistan. The company is known for the best value for money and being economical it is one of the most sold seasonings and culinary brands in Pakistan. Being a local company located at SITE in Karachi with one of the best infrastructures the company is also known for allocating budget for research, which is not common in Pakistan. It is the top advertised brand of the culinary product and is widely available throughout the country with the strongest distribution setup. The company is also known for introducing unique packaging, and environment-friendly processes. The company claim to introduce flexible packaging for the first time in 1990, for its tomato ketchup followed by pickles. Being a Pakistani company and also investing in research and development, the company introduces products that are most fit for the Pakistani market. For instance, the company caters the needs of both consumers interested in western and local dishes. Therefore it offers sauce for Greek Chicken Calzone and seasoning for Mutton Chanp and Bihari Botti. Shangrila products are approved by Food and Drug Administration USA, Saudi Arabian Standards Organization, Ministry of Health of UAE and Qatar, Australian Quarantine Inspection Service, Bangladesh standard Testing Institute, Canadian Food Inspection Agency, Food Standard Agency the UK, Norwegian Food Safety Authority, and Pakistan Standards and Quality Control Authority.

Market Approach and Strategy of Different Culinary Brands in Pakistan

In the condiments, industry there is not much focus on the advertising. All the imported brands have already an established footprint in the market; therefore, they do not rely much

on an advertisement. However, local brands such as Shangrila and national have a wide product line due which they have higher brand recognition, which has a spillover effect on their least advertised products such as sauces. Similarly, Quereshi Enterprises has not invested in promoting and communicating Razmin value to the customers. The company has a well-established platform in its B2B market which includes restaurants and cafes. The company has been successful in their B2B selling by approaching restaurants and selling them on value hence finalizing the deal on integrative negotiation. The company has various Key account in the B2B segment which is mentioned in exhibit 3.

Razmin has a weaker distribution channel in B2B and B2C as most of its variants are unavailable in the market. In some supermarts such as Imtiaz-Nazimabad and TM Mart-Phase 6, all of their sauces were available whereas in Ebco and Diamond only a few bottles of sauces were found on the shelves. Recently the company held brand activation of their sauces at Expo Center in which they conducted a taste test. Consumers gave a positive response after tasting the product which resulted in consumer buying the product and over 500 bottles were sold in a matter of few hours.

Marketing Program of Qureshi Enterprises

The biggest challenge the company is facing is not being aware of its target market. After analyzing the market it was found that the potential target market which the company should be looking at is different. The right audience for Razmin is aged between 18-35 and includes both male and female. These people belong to the upper-middle class and upper class who can afford the price range of Razmin. The brand is trying to position itself as a premium quality product; however, the results from the observational research determined that quality perception has not been translated in the mind of the consumer. The company has not been able to distinguish itself from its competitors due to lack of promotional campaigns and minimal presence on media. The company only has a Facebook page with a low level of engagement even though they host various online cooking competitions and that too has a low response. Besides Facebook, there is no other platform on which the company is present and this too has no honest reviews. On the other hand, Suree has a huge presence on social media which includes not only Facebook but YouTube as well.

The company salespersons do not visit the stores regularly and therefore lack the knowledge of their products' performance. Whereas competitors sales reps frequently visit the supermarts to analyze how well their products are doing and proactively engage in In-store promotion. Moreover, the competitors are relying heavily on word of mouth marketing whereas due to less market presence Razmin lags behind in this domain and also has no presence on cooking shows on TV channels. All the imported brands are following the premium pricing strategy due to which their sauces are little expensive as compared to the local players in the market. Keeping in view the prices of imported brands, Razmin has kept its prices competitive to penetrate the Pakistani market which is highly-priced sensitive. One reason why the imported brands are so successful so far is due to the variety of sauces they offer and that too in various bottle sizes as can be seen from Exhibit 2. These brands are catering to the needs of everyone, whether you are a frequent user of sauce or you use it once in a while. We know from our research that consumers in the Pakistani market do not use sauces on a regular basis and these smaller bottle sizes are highly suitable for them.

Market Insights and Survey Results

In order to find out consumers preferences and buying behaviour, a mall intercept and survey was conducted in which over 300 people took part and this included both males and females aged between 18 and 40. Through Observation and mall intercepts surveys it was found that Razmin was not picked by any customer. As per floor manager of Imtiaz Store, it's oyster sauce sells when other brands are not available. Upon asking people it was observed the brand has very low awareness. One user gave an unfavourable response about the Worcestershire sauce's colour. The interview with the store managers revealed that there is inconsistency in distribution and brand is not investing in a pull strategy. Unfortunately, even with good quality, the brand is not selling well due to inconsistency in distribution and not investing in the pull strategy. This result in anger of store managers and some of them including one among the most famous in defence area told that they are considering discontinuing selling Razmin.

It was also observed that consumers prefer local brands because of availability and low cost. Shangrila is at the top of people's mind when talking about the cooking sauce. Kings and key were other popular brands. Amongst Imported sauce brands Suree leads the market followed by American Garden & Mama Sita. Suree's sales are high because of the chef's recommendation on masala TV; it is relatively expensive but comes in different sizes. Consumers prefer 150 ml bottle and imported brands come in various sizes. At Imtiaz Store, Suree is restocked twice a day. The results from the survey made it clear that consumption of sauces is less frequent in Pakistan. People either prefer desi food or fast food with little or no use of the sauce. Sauces are used once in a while. The pie chart (Exhibit 3) shows clearly the frequency with which people consume such products and we can see that over 50% of the people use it infrequently.

The bigger players in the market which are imported include American garden, Suree and Frank's, while the local industry is led by national and Shangrila with high brand awareness (Exhibit 4). One reason is that these brands are there in the market for a long time and has a wide product line. On the other hand, only 14% of people knew about Razmin, which shows that brand awareness and recognition is the area in which the company is lagging behind. People who had heard about Razmin, knew the product because of friends or family or through social media or because they saw the product at the store. For this type of product, one of the best ways to promote is to use word of mouth advertising, as this is something people would only try when they have heard good reviews about it. In Pakistan, even those who consume sauces the frequency is low. The survey revealed that over 60% of people use either 1 or less than 1 bottle in a month (Exhibit 5). To promote this type of product different brands have started placing their products on the cooking shows. So when asked about how the presence of celebrity chefs influences their purchasing decision, 44% of respondents agreed that they get influenced by celebrity chefs and most of them were females (Exhibit 6). When people do not find their preferred brand, they are more likely to switch to another brand which clearly shows that most of the consumers are not too loyal to the brand they currently use and this presents an opportunity for Razmin (Exhibit 7). Out of 300 respondents, 162 have agreed to switch to another brand if they do not find the brand they like and 70 have disagreed. When asked about complementary products, 158 respondents agreed that are likely to buy the item if it comes with a complimentary product and 85 people said to have no effect of such offer (Exhibit 8).

People consume either 1 bottle or less than 1 bottle in a month as finding out in the survey,

so the size of a package is an important factor when people buy the product and it is evident from the graph which shows that to 201 respondents claim that size of the bottle matters (Exhibit 9). Out of 300, 125 respondents preferred smaller bottle sizes whereas 79 respondents were indifferent to this factor (Exhibit 10). This is a good opportunity for Razmin to cater to the Pakistani market by introducing bottles in a smaller size than what's already there in the market. Most of the brands are providing sauces in glass bottles while consumers prefer the bottles to be made of plastic (Exhibit 12). Consumers are more likely to buy the brand they can easily recognize in the store (Exhibit 13). Most of the respondents, 200 of them, agreed to this statement saying that would buy the brand if they already know about it. This is a gap that Razmin needs to fill. Due to its low brand awareness, people are not buying the product even when the product is right there on the shelves along with other brands. This also shows that getting shelf space at big supermarkets is not enough to capture the market share.

Pakistani market quite price sensitive and people will switch to another brand if they get similar value at a lower price (Exhibit 14). From the graph, it is obvious, as 146 respondents said that they will change the brand if they get a competitive price from any other brand and some 87 people did not care about the price at all. The seasonings market is already mature and Razmin will have to keep its prices competitive to penetrate into the market. In-store, advertising has a huge impact on customers buying decision and it is less expensive as compared to other forms of advertisements such as TV ads or billboards (Exhibit 15). In order to see how people would react to such an advertisement, we asked respondents if they are influenced by this and there was a positive response from 162 respondents whereas 72 respondents did not have any influence of such promotional activity on them. One way to promote this sort of product is through cooking shows such as shows on Masala TV. There is a number of products that have used this strategy such as Suree, Italia olive oil, Moulvi cooking oil etc. and it has gained them brand awareness and drastically raised their sales. Of the 300 respondents we surveyed, 169 agreed that cooking shows do have an influence on their purchasing decision and only 51 of them were not influenced by such shows. This is one of the easiest ways for Razmin to promote its product as these shows are watched by thousands of people who cook and shop too and a positive word of mouth from such shows can have a huge influence on people as discovered from the survey.

Insights from Razmin Users

The surveyors also did a qualitative survey, the target audience was Razmin users. It was observed that the reason behind their choice was because their preferred brand was out of stock or they saw Razmin Stall at Expo exhibitions. In most cases, it was the sales rep that influenced the purchase. The users rated their experience as an ordinary one mostly, they did not find anything unusual, nor were they confident to continue using or recommending the brand. There was a strong disagreement on the statement that Razmin would be the first choice of brand when buying sauces. When talking of cooking sauces their first preference was American Garden in imported brands and Shangrila in local brands.

Verbatim

- 1 "It was recommended to me by chef and I am only here to buy what's on the list"
- 2 "I saw Shireen Appa making recipes with this sauce"
- 3 "Once in two weeks, we don't keep many pieces of this brand, Suree however at

- times we have to restock twice a day” (Imtiaz Floor Supervisor)
- 4 “It is very economical, plus I have always seen my mother using these brands”
 - 5 “Yes, once I bought its oyster sauce because Suree was not available, I did not like it, no matter how good the food tastes if the colours don't come outright. One does not feel like eating it. Razmin destroyed the colour of my gravy”
 - 6 “I see the thickness of a sauce and expiry of course.”
 - 7 “Yes, I bought their Oyster sauce from Expo they had a stall there.”
 - 8 “Never heard of it.”
 - 9 “I didn't feel any difference.”
 - 10 “The colour and price.”
 - 11 “Yes! I did once, just for the sake of trying but I think American Garden is the best, no comparison there.”



Exhibit 1: Razmin product offering and prices

Serial #	Product Name	Qty	Price (Rs.)
1	Oyster Sauce	700ML X 12 / CTN	440
2	Sweet Chilli Sauce	700ML X 12 / CTN	430
3	Chilli Sauce	700ML X 12 / CTN	440
4	Worcestershire Sauce	700ML X 12 / CTN	490
5	Oyster Sauce	300ML X 12 / CTN	240
6	Sweet Chilli Sauce	300ML X 12 / CTN	235
7	Chilli Sauce	300ML X 12 / CTN	240
8	Worcestershire Sauce	300ML X 12 / CTN	270
10	Hoisin Sauce	300ML X 12 / CTN	270
11	Teriyaki	300ML X 12 / CTN	260
12	Dark Soy Sauce	250ML X 12 / CTN	195
13	Dark Soy Sauce	1.9L X 6 / CTN	800
9	Cream Style Corn	425G X 24 / CTN	110
14	Sweet Kernal Corn	425G X 24 / CTN	95

Exhibit 2: Competitor Brands Products & Prices

	Top Most Seller
	Second in Line
	Third in-line
	Consumed in Chinese Food
	Top Seller in its own Category

Exhibit 2: Competing brands of Razmin

Sauce Brand	Flavours	Weight	Price
Mamasita	<i>Oyster Sauce</i>		Rs. 440
Suree	<i>Fish Sauce</i>	150 ml	Rs. 175
	<i>Fish Sauce</i>		Rs. 320
	<i>French Fries Sauce</i>	200 ml	Rs. 235
	<i>French Fries Sauce</i>	435 ml	Rs. 425
	<i>Thai Chilli</i>	295 ml	Rs. 335
	<i>Thai hot Chilli</i>	295 ml	Rs. 295/335
	<i>Sweet Sauce</i>	295 ml	Rs. 295/200/335
	<i>Sweet and Sour Sauce</i>	295ml	Rs. 295/335
	<i>Teriyaki Sauce</i>	295ml	Rs.295/335
	<i>Barbecue</i>	150 ml	Rs. 195
	<i>Barbecue</i>	295 ml	Rs. 295/335
	<i>Green Chilli</i>	295 ml	Rs. 295
	<i>Mushroom Sauce</i>	295 ml	Rs. 295
	<i>Pad Thai Sauce</i>	295 ml	Rs. 295/335
	<i>Chilli Oil</i>	150 ml	Rs. 340/380
	<i>Chilli Oil</i>	295 ml	Rs. 650
	<i>Tom Yum Paste</i>	227 g	Rs. 360
	<i>Tom Yum Paste</i>	454g	Rs. 625
	<i>Siracha Extra hot Chilli Sauce</i>	435 ml	Rs. 465/440
	<i>Sweet Plum</i>	150 ml	Rs. 195
	<i>Plum Chilli Sauce</i>		Rs. 320
	<i>Garlic Siracha Chilli Sauce</i>	435 ml	Rs. 440
	<i>Seasoning Sauce Black Pepper</i>	150 ml	Rs. 195
	<i>Seasoning Sauce Black Pepper</i>	295 ml	Rs. 335
	<i>Tamarind Chutney</i>	295 ml	Rs. 335
	<i>Japanese Soy Sauce</i>	295 ml	Rs. 335
	<i>Chilli and Garlic Green</i>	150 ml	Rs. 195
<i>Chilli and Garlic Green</i>	295 ml	Rs. 335	
<i>Chilli and Garlic Red</i>	150 ml	Rs. 195	
<i>Chilli and Garlic Red</i>	295 ml	Rs. 335	
<i>Spring Roll Chilli Sauce</i>	150 ml	Rs. 200	

	<i>Chilli Lemon Grass</i>	295 ml	Rs. 335	
	<i>Sugar-Free Sweet Chilli</i>	295 ml	Rs. 335	
	<i>Siracha Chilli and Holly Basil</i>	435 ml	Rs. 445	
	<i>Thai Sirach Mild Chilli</i>	295 ml	Rs. 335	
	<i>Thai Siracha Extra hot Chilli</i>	200 ml	Rs. 235	
	<i>Sesame Oil Seasoning</i>	295 ml	Rs. 650	
	<i>Dark Soy</i>	150 ml	Rs. 195	
	<i>Sauce Dark Soy</i>	295 ml	Rs. 345	
	<i>Fish Grade A</i>	295 ml	Rs. 335	
	<i>Seasoning Sauce Hoi Sin</i>	435 ml	Rs. 550	
	<i>Sauce Light Soy Premium</i>	150 ml	Rs. 195	
	<i>Sauce Light Soy Premium</i>	295 ml	Rs. 335	
	<i>Mushroom Soy</i>	150 ml	Rs. 195	
	<i>Mushroom Soy</i>	295 ml	Rs. 335	
	<i>Sauce Oyster</i>	150 ml	Rs. 195	
	<i>Oyster</i>	295 ml	Rs. 345	
	American Garden	<i>White Vinegar</i>	473 ml	Rs. 155
		<i>Hot Sauce</i>	472 ml	Rs. 195
		<i>Soy Sauce</i>	284 ml	Rs. 215
		<i>Steak Sauce</i>	295 ml	Rs. 215
<i>Apple Cider Vinegar</i>		32 oz.	Rs. 270	
BBQ Sauce Original		510 g	Rs. 489	
<i>American Garden's Apple Cider Vinegar</i>		16 oz.	Rs. 130	
<i>American Garden's Soy Sauce</i>		10 oz.	Rs. 280	
<i>American Garden's Worcestershire Sauce</i>		5 oz.	Rs. 170	
<i>American Garden's Tabasco hot Sauce .</i>		2 oz.	Rs. 125	
<i>American Garden's White Vinegar</i>		16 oz.	Rs. 155	
<i>American Garden's hot Chili Sauce</i>		6 oz.	Rs. 150	
<i>American Garden's Steak Sauce</i>		10 oz.	Rs. 229	
<i>American Garden's Worcestershire Sauce</i>		10 oz.	Rs. 155	
<i>American Garden's Horseradish Sauce</i>	16 oz.	Rs. 345		
Kikkoman	<i>Soya Sauce Naturally Brewed</i>	296 ml	Rs. 290/400	
	<i>Soy Sauce</i>	1 Litre	Rs. 690/750	
	<i>All-Purpose Soy Sauce</i>	150 ml	Rs. 370	
	<i>Naturally Brewed Soy Sauce</i>	591 ml	Rs. 650	
	<i>Soy Sauce</i>	148 ml	Rs. 320	
	<i>Marinade Sauce Teriyaki</i>	296 ml	Rs. 450	
	<i>Naturally Brewed Soy Sauce</i>	150 ml	Rs. 550	

Nandos	<i>Peri Peri Sauce Garlic</i>	250 ml	Rs. 400
	<i>Peri-Peri Sauce Garlic</i>	125 ml	Rs. 230
	<i>Hot Peri-Peri Sauce</i>	250 g	Rs. 290
	<i>Peri-Peri Mild Sauce</i>	125 ml	Rs. 290
	<i>Hot Peri-Peri Sauce</i>	125 ml	Rs. 230
	<i>Hot Peri-Peri Sauce</i>	250 g	Rs. 430
	<i>Lemon & Herb Peri-Peri Sauce</i>	125 g	Rs. 250
	<i>Peri-Peri Garlic Sauce</i>	250 g	Rs. 430
	<i>Garlic Peri-Peri Sauce</i>	125 ml	Rs. 290
	<i>Garlic Sauce</i>	250 ml	Rs. 430
	<i>Wild Herb Peri-Peri Sauce</i>	125 ml	Rs. 230
	<i>Wild Herb Peri-Peri Sauce</i>	250 g	Rs. 430
	<i>Medium Peri-Peri Sauce</i>	250 ml	Rs. 430
	<i>Pepper Sauce</i>	250 ml	Rs. 400
	<i>Extra Hot Peri Peri Sauce</i>	132 g	Rs. 430
<i>Extra Hot Peri Peri Sauce</i>	125 ml	Rs. 230	
Frank's	<i>Frank's Red Hot Sauce Chile n Lime</i>	350 ml	Rs. 385
	<i>Frank's Red Hot Sauce Original</i>	350 ml	Rs. 385
	<i>French's Franks Red Hot Buffalo Wing Sauce</i>	12 oz.	Rs. 395
	<i>Frank's Red Hot Extra Hot Sauce</i>		Rs. 470
	<i>Frank's Red Hot Sauce</i>	148 ml	Rs. 300.00

Exhibit 3: The last time you used in cooking sauce

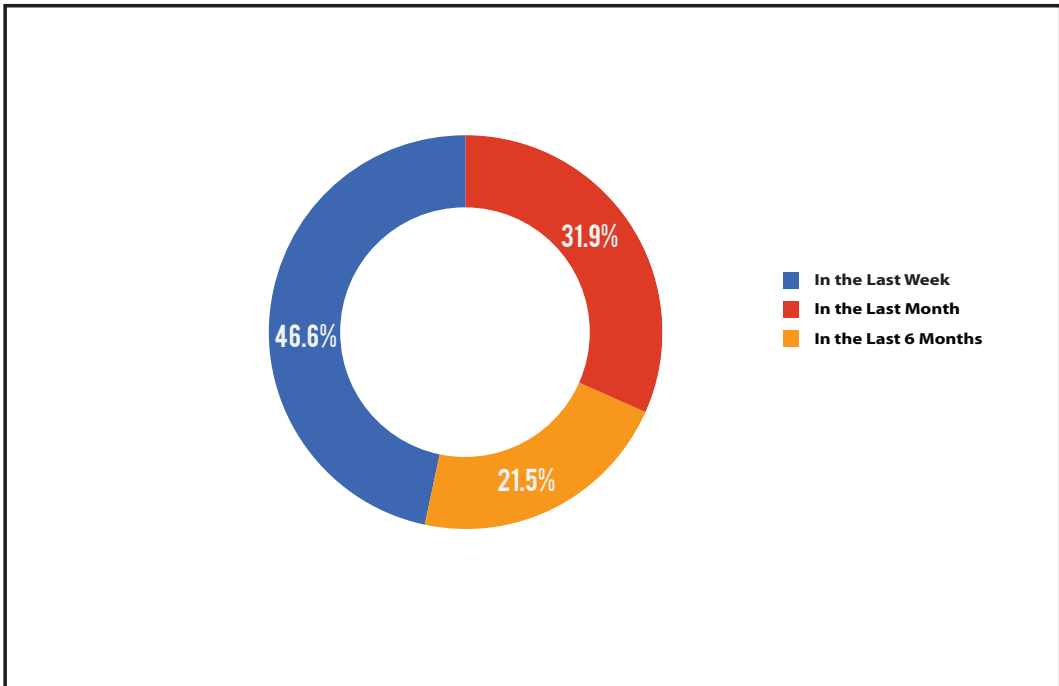


Exhibit 4: Sauces Consumers have heard of

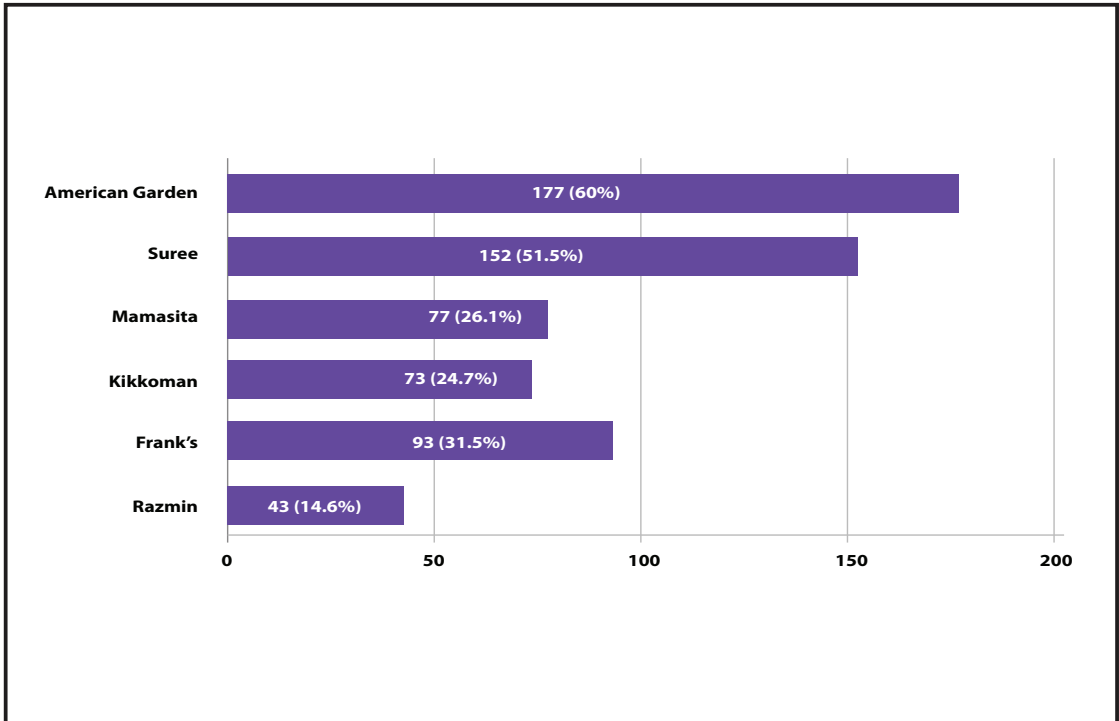


Exhibit 5: Bottles typically used in a month

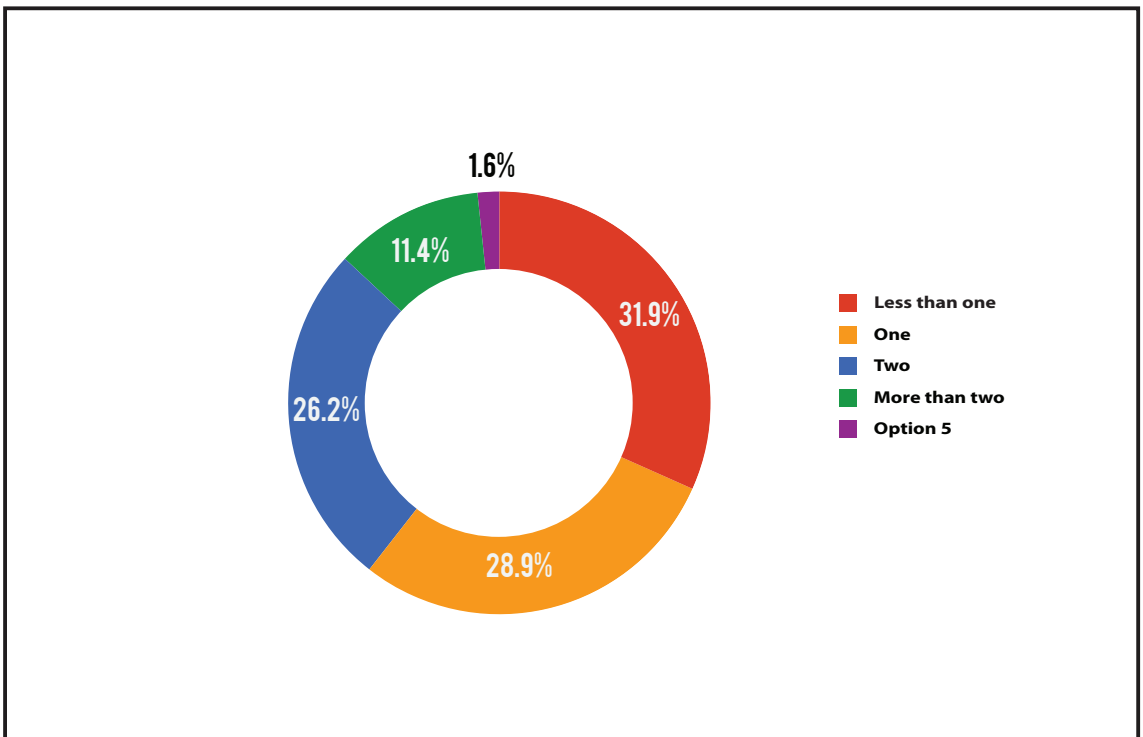


Exhibit 6: Impact of chef presence on consumer's choice

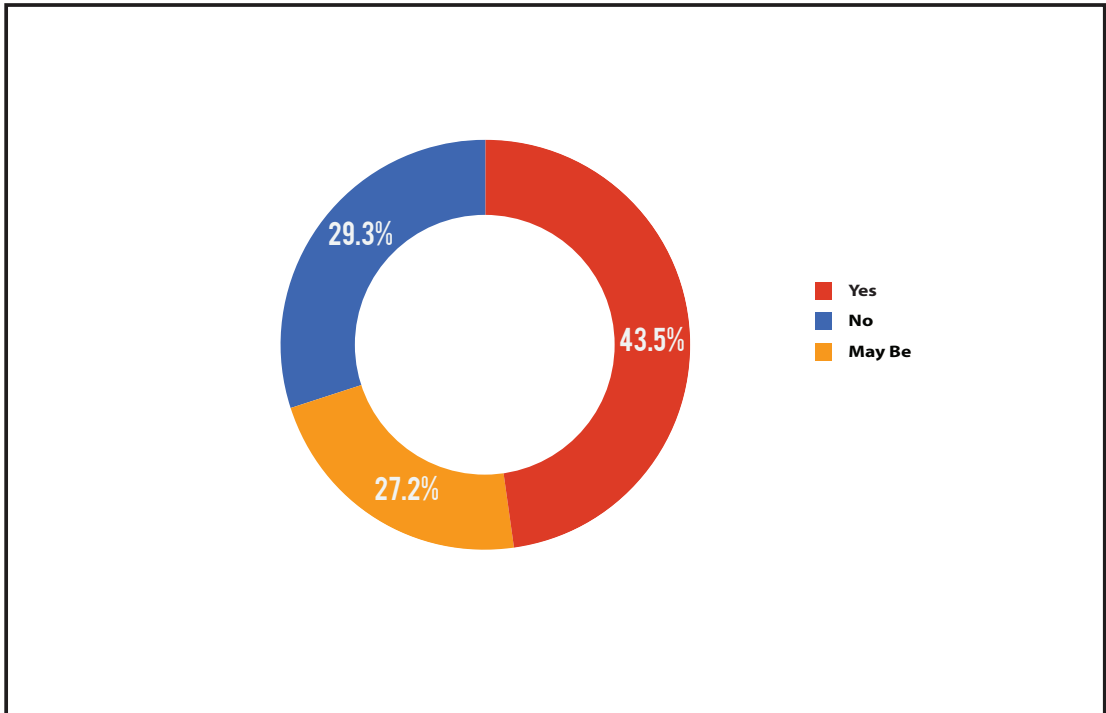


Exhibit 7: Responses to When I do not find my preferred brand I generally switch to another

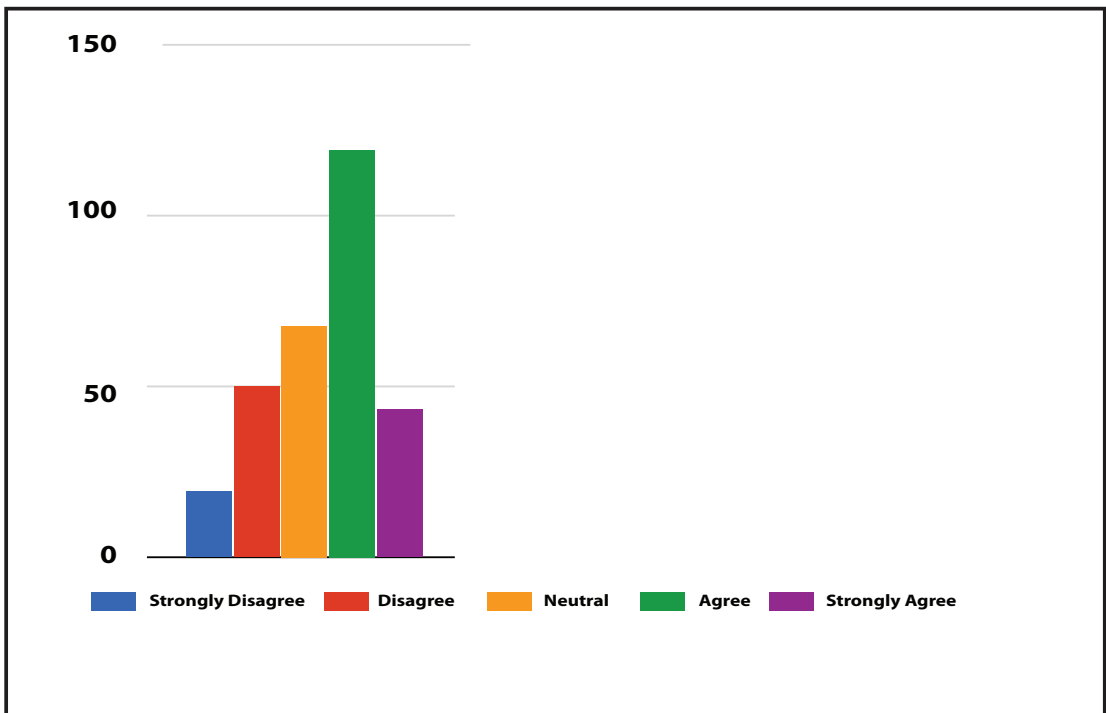


Exhibit 8: Responses to I will buy cooking sauce if it comes with a complimentary product

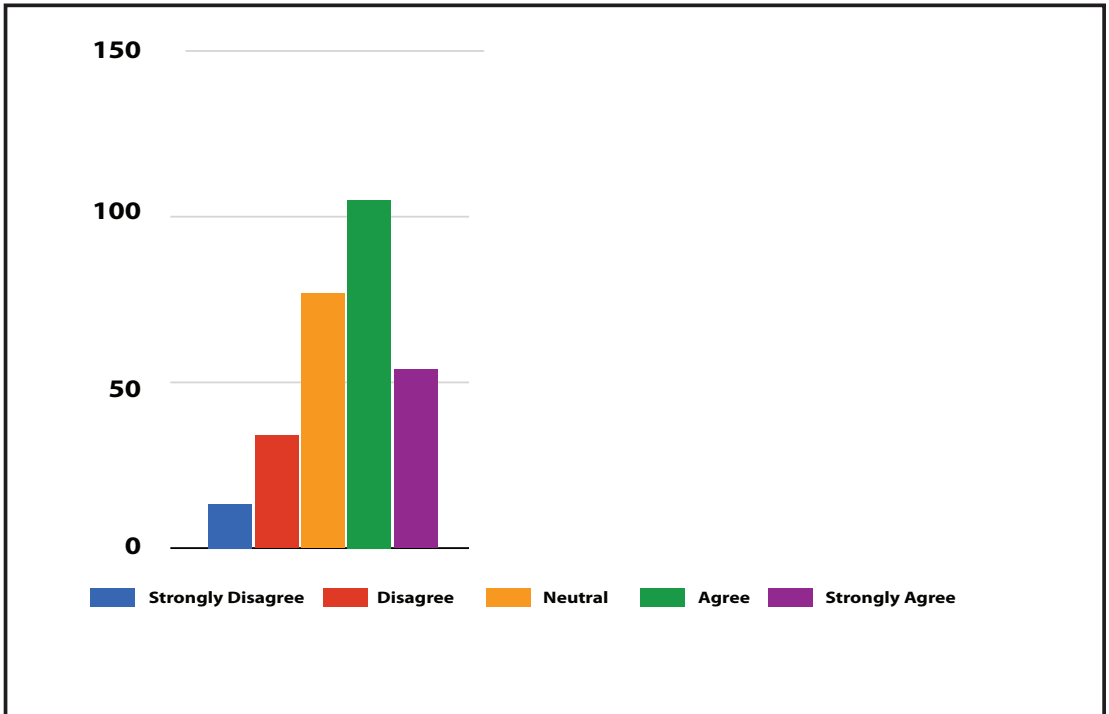


Exhibit 9: Responses to Size of the bottle matters when buying cooking sauce

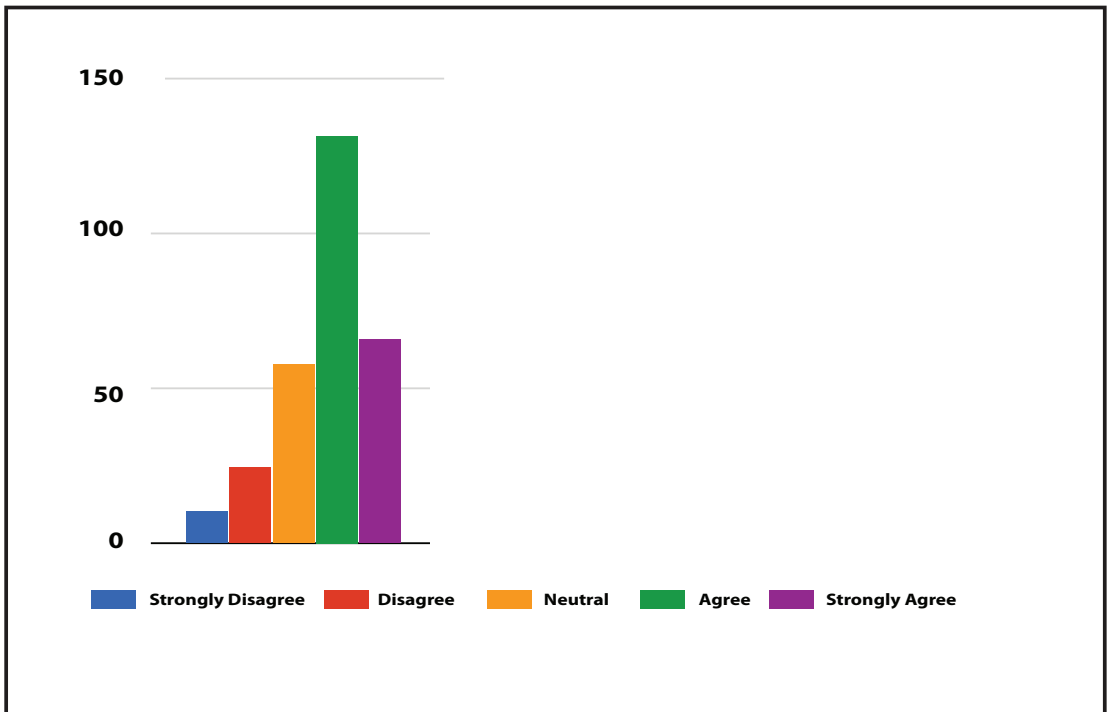


Exhibit 10: Responses to I prefer sauce in smaller bottle size

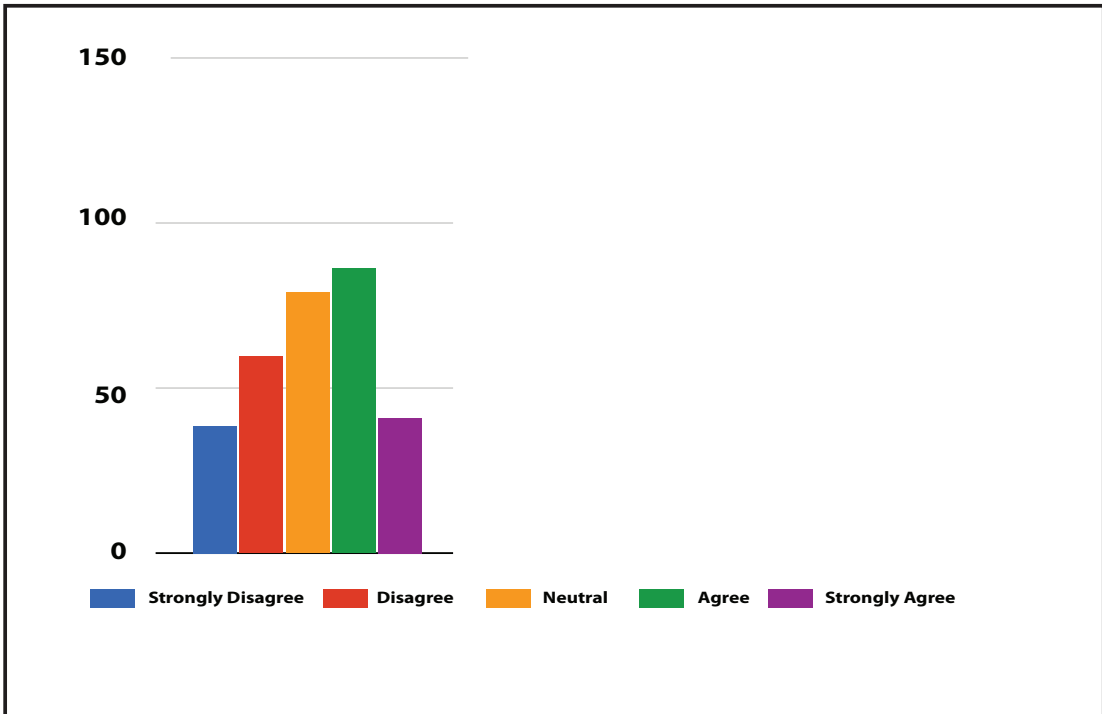


Exhibit 11: Responses to Sauce should be in a glass bottle

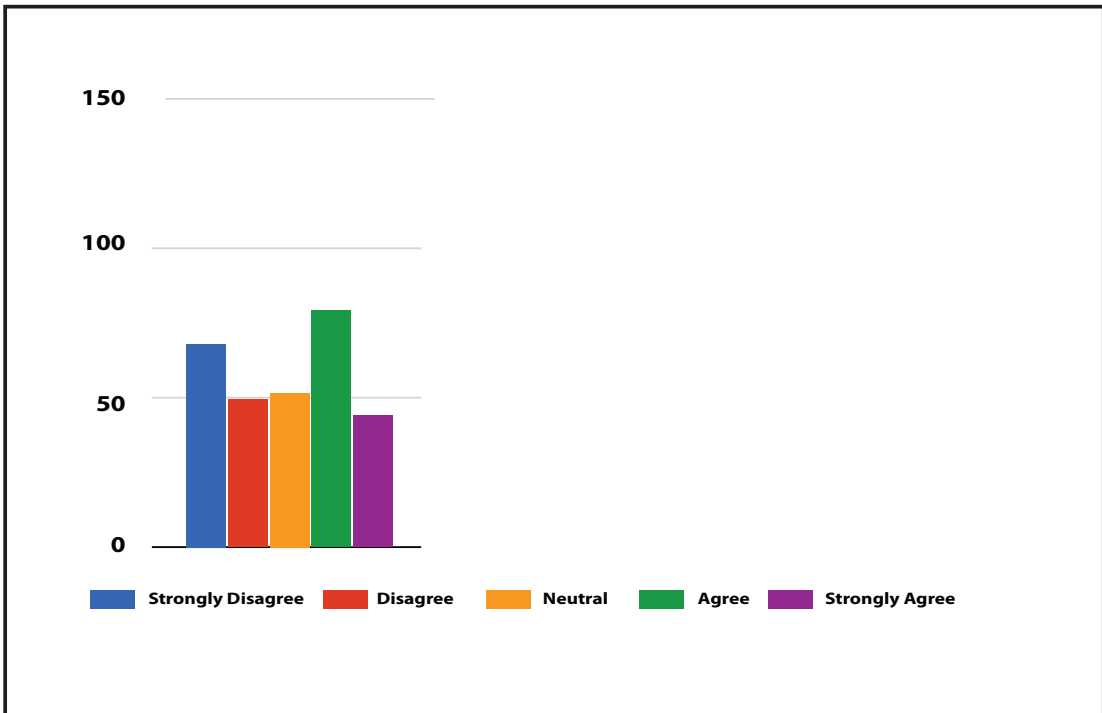


Exhibit 12: Responses to Sauce should be in a plastic bottle

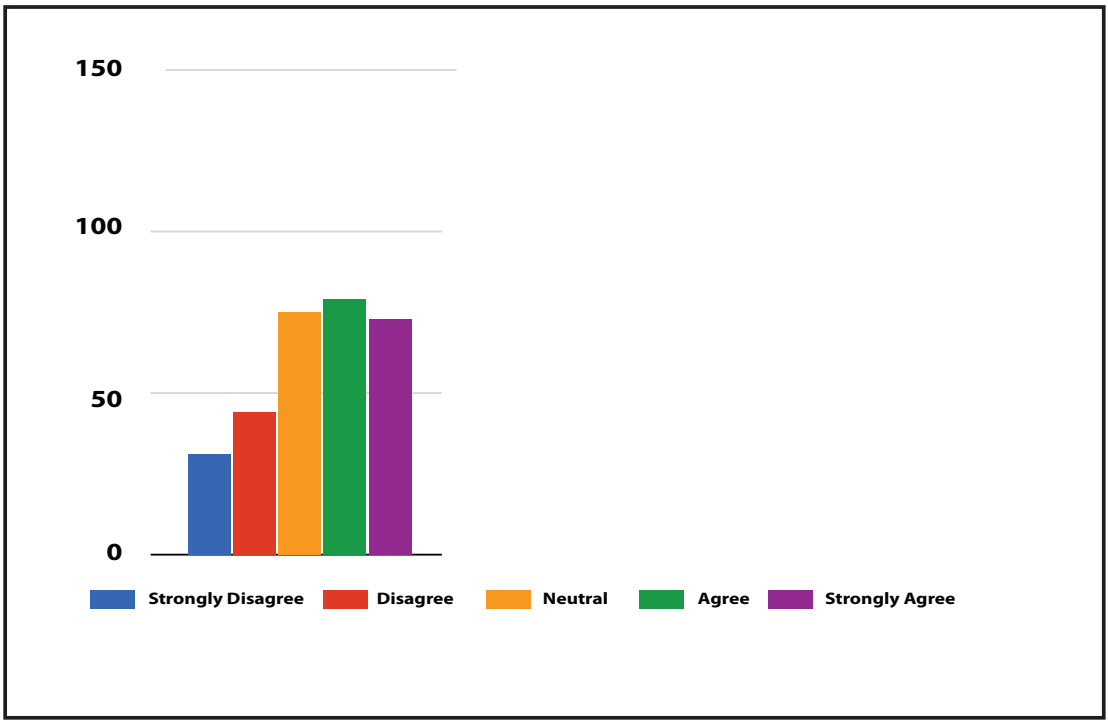


Exhibit 13: Responses to I like to choose the brand I can easily recognize in the store

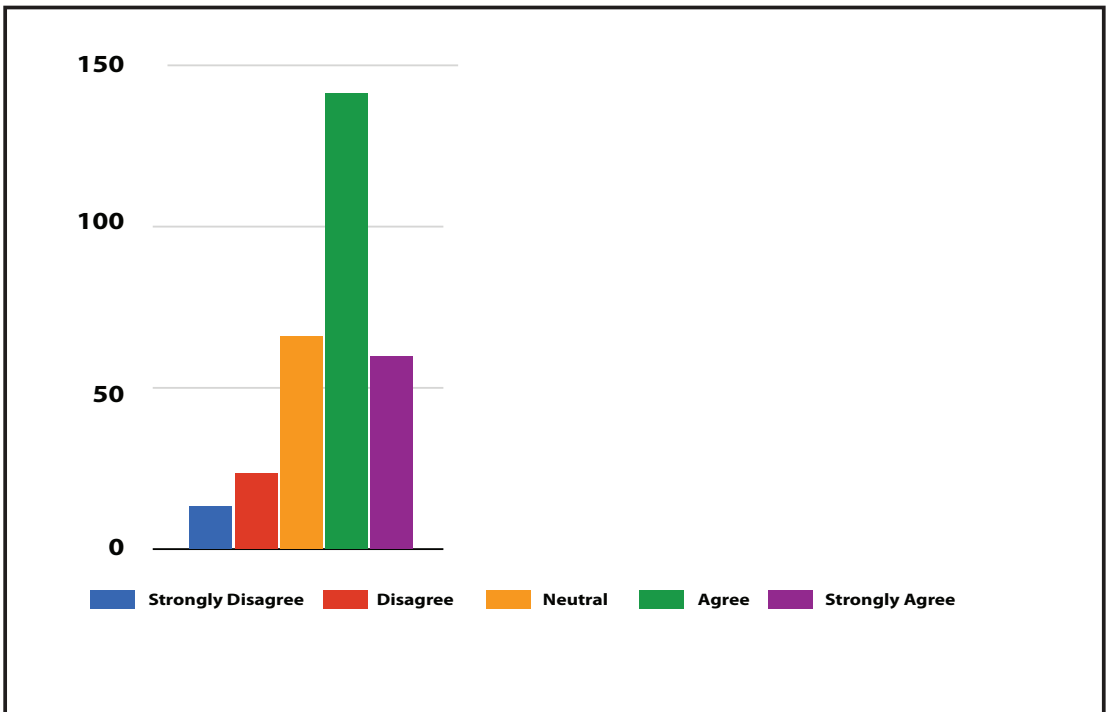


Exhibit 14: Responses to I change the brand in the store when the other brand offer at a competitive price

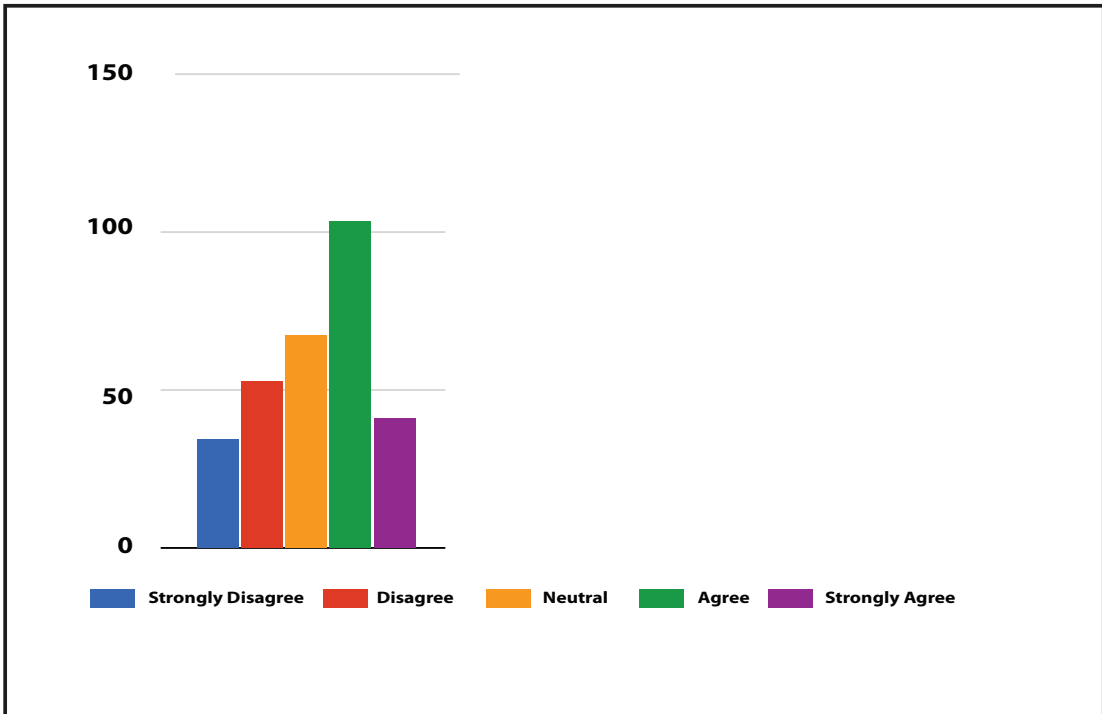


Exhibit 15: Responses to In-store advertising like posters stickers and sales promotion like price, discounts and free samples influence my decision

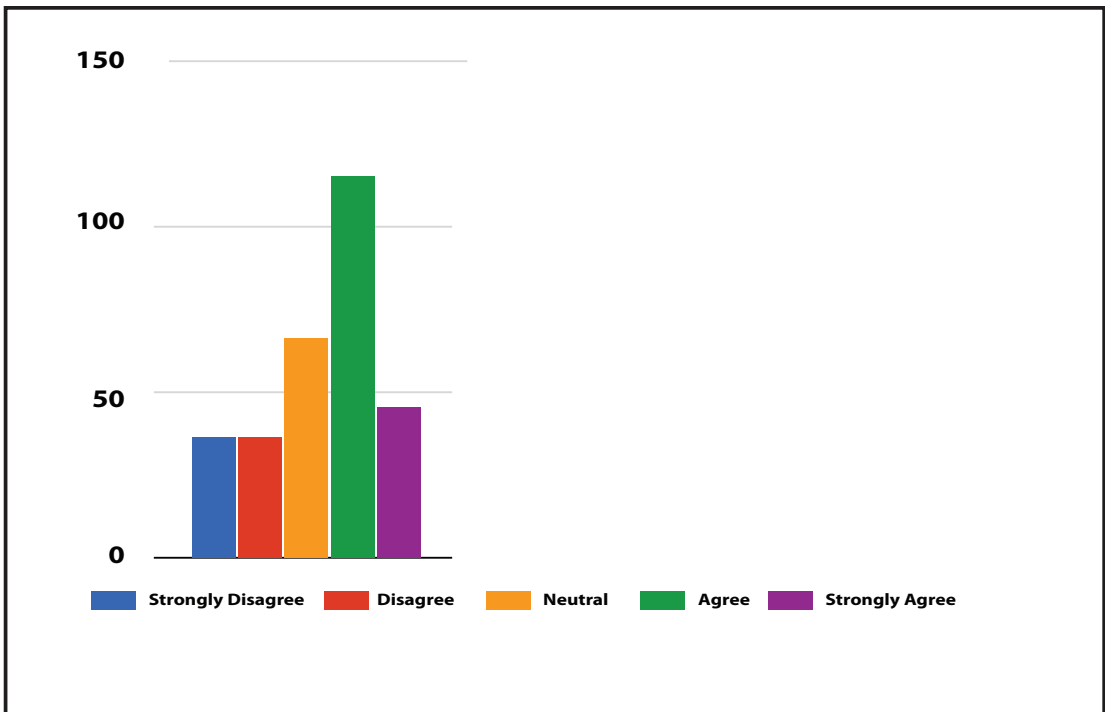
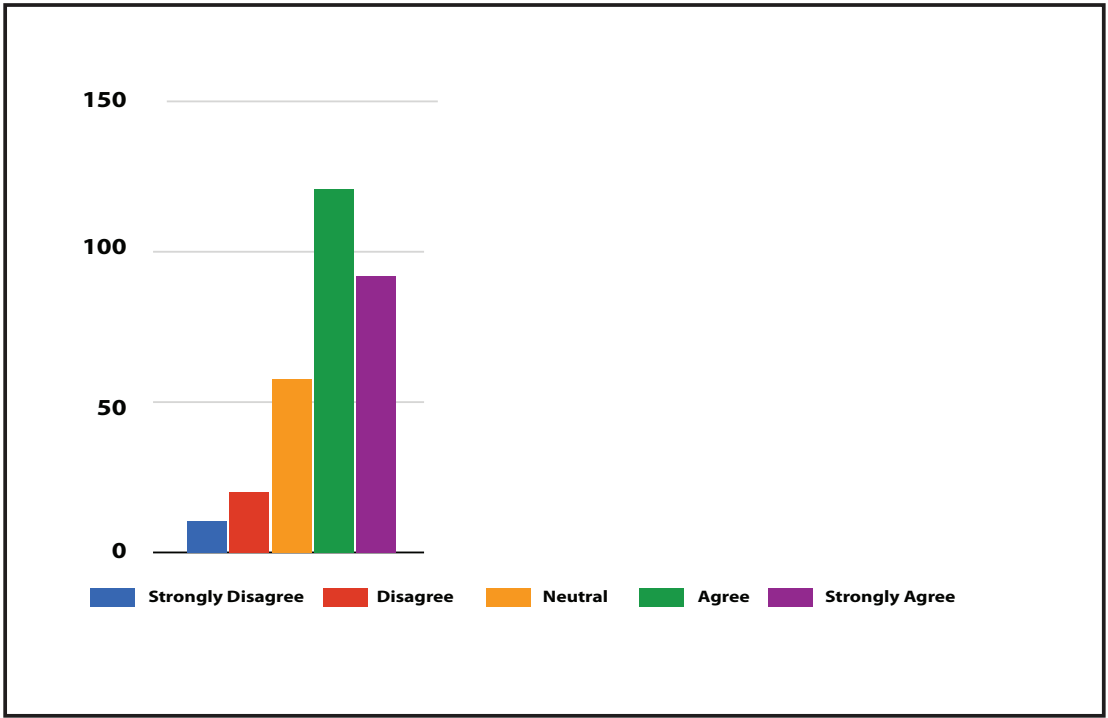


Exhibit 16: Responses to Brand name matters when I buy cooking sauce



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