



Cooperative Education Report

Market Analysis of FMCG products of Asian Thai Foods and Goodlife Beverage

Written by

Mr. Manohar Manandhar
Student ID 5708040049

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Title: Market Analysis of FMCG products of Asian Thai Foods and Goodlife Beverage


Written by: MANOHAR MANANDHAR

Department: BBA (Marketing)

Academic Advisor: Asst.Prof. Maruj Limpawattana, Ph.D.

We have approved this cooperative report as a partial fulfillment of the cooperative education program semester 2/2017

Oral Presentation Committees

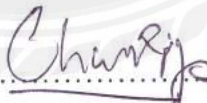


.....
(Asst.Prof. Maruj Limpawattana, Ph.D.)

Academic Advisor



(Pallav Bhandari)
Job Supervisor



.....
(Chantip Suksai)

Cooperative Committee



.....
(Asst.Prof. Maruj Limpawattana, Ph.D.)

Assistant President
and Director of Cooperative Education

Project Title: Marketing Analysis of FMCG products of Asian Thai Foods and Good life Beverage
Credits: 5
By: Mr. Manohar Manandhar
Advisor: Asst. Prof. Dr. Maruj Limpawattana
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Abstract

This report is prepared based on the knowledge and experience achieved during 3 months cooperative education program at Asian Thai Foods (P) Ltd which is one of the leading Noodles manufacturers of Nepal. This company is serving the domestic market since long time and its products are widely accepted in India, Dubai, Bhutan and Qatar as well. The main objective of this study is to study and analyze market trend, consumer preference and interest. Consumers are the major stakeholders of any business organization. Thus, satisfying consumer need and demand is very much important to dominate the market. Field visit and survey questionnaires have been used as a main tool for this study. The results from the analysis of survey data helped the organization to understand the market trend and consumer preference. Cooperative Education at ATF provides a great opportunity to learn and understand corporate marketing and branding strategy and helps one to explore theoretical knowledge earned during regular course in practical settings.

Keywords: Market, Demand, Consumer, Survey

Acknowledgement

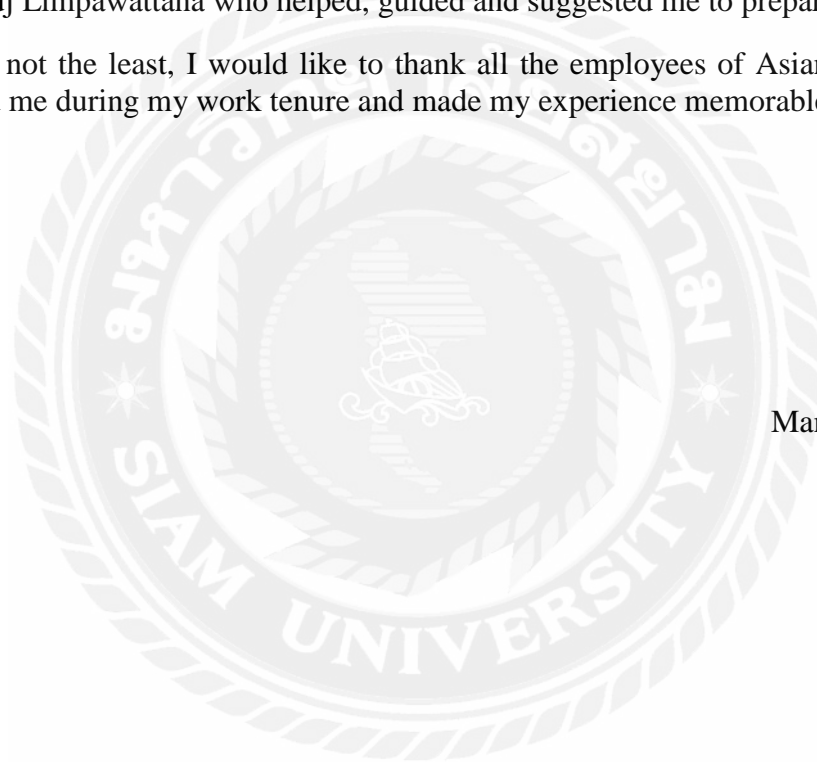
I would like to thank Asian Thai Foods (P) Ltd. for providing internship opportunity. This opportunity helped me to experience the real professional world and implement my theoretical knowledge in practical settings.

I am very grateful to my Supervisor, Mr. Pallav Bhandari. His support and guidance has helped me to achieve my objective within a short span of time.

I also show a very special gratitude to Asst. Manager- HR, Mr. Nitesh Gupta for his kind support and timely feedback. He not only gave his valuable time but also shared his experiences with me which helped me to work smoothly.

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Last but not the least, I would like to thank all the employees of Asian Thai Foods (P) Ltd. who helped me during my work tenure and made my experience memorable.



Manohar Manandhar

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Chapter 1 : Introduction

1.1. Company Profile

Sharda Group is one of the largest private industrial and conglomerates in Nepal. Asian Thai Foods (P) Ltd. is the joint venture company of Sharda Group and Jaju Group. Asian Thai Foods (P) Ltd. is one of the popular noodles and snacks manufacturers of Nepal which has made its presence in the international arena too. Some of its popular products are Rumpum Noodles, Preeti Noodles, Mama Bhujija, 2 PM, Miteri, Cheese Balls etc.

Also, Goodlife Beverages and Asian Biscuit and Confectionery (P) Ltd. are yet another stepping stone to strengthen the joint venture between Jaju Group and Sharda Group. The alliance between two corporations started 12 years ago with Asian Thai Foods (P) Ltd. Asian Biscuit and Confectionery (P) Ltd. was established in 2012. The plant setup is the largest biscuit factory with its state of the art infrastructure located in Duhabi, Sunsari, Nepal. Having the best baking technology installed, with a fully automated unit, 6 baking zones 250 feet long, the baking unit has an optimum airflow and moderate temperature to meet the perfect condition for baking. The baking plants have been ensured with highest quality control measures to make the products healthy and tasty. With such infrastructure and technology, objective is to provide products of highest quality and taste which no other brand in Nepal offers. Also, this takes at par along with other International brands in the market in terms of technology and quality. (Goodlife, 2018)

Goodlife Beverage (P) Ltd. commenced production on September 4, 2017, as a partnership between Sharda Group & Jaju Group. After two successful partnerships in FMCG manufacturing for noodles & snacks by the name of Asian Thai Foods (P) Ltd. & for biscuits & confectioneries by the name of Asian Biscuit & Confectionery (P) Ltd. Sharda Group and Jaju Group come up with this beverage facility to continue to provide consumers with varied healthy and good drinks.

Goodlife Beverage (P) Ltd was set up with an initial investment of over 60Crore, this Tetrapack aseptic filling facility is the best in Nepal. This state of the art facility built over 100000sq. ft. of land is capable of packing 22500 packs of 200ml fruit-based drinks per hour. (Goodlife Beverage, 2018)



Figure 1 Asian Thai Foods Corporate Office



Figure 2 Asian Thai Foods Corporate Office



Figure 3 Asian Thai Foods Corporate Office

Product Offerings:**1. Asian Thai Foods**

S. N	White Noodles	Brown Noodles	Snacks
1	Kosheli	Rum Pum	Mama Bhujia
2	Dautari	Preeti	Pik Vik
3	Preeti	Preeti Pizza	Kurankura
4		2 Minute-Mazza	Mama Cheese Balls
5		2PM	Mama Potato Cracker
6		Wow-Chow	n-Joy
7		Fatafat	Chattarpattar
8		Miteri	Twister
9		RumPum Dus	Fuchche Cheese Balls
10		Gaurav	
11		Joker	
12		Krrish	
13		Fuchche	
14		n-Joy	

Table 1 Product Offering: Asian Thai Foods

(asianthaifoods, 2018)



Figure 4 Products of ATF

(asianthaifoods, 2018)



Figure 5 Products of ATF

(Asian, 2018)

2. Goodlife Beverage

- i. TetraPack Goodlife Mango Juice (Goodlife Beverage, 2018)

3. Asian Biscuit and Confectionery

S.N.	Biscuits	Confectionery
1	Digestive	Choco Kid
2	Treat, Top	Choco Luv
3	Marie	Milky Bar
4	Bourbon	Coffee Times
5	Kookies	Coffino Candy
6	Crackies	Punch
7	Butter Cracker	Treat
8	Fitkid Glucose	Double Break
9	Gupshup	Luvs Candy Mint Mood
10	Sugar Free	Lychee Candy
11	Rumpum	Mango Magic
12	Magic Cream	Mint Mood
13	Butter Bite	Mero Lacto
14	Digestive Gold	Mitho Mango
15	Goodlife Kookies Choco Chips	Lacto Candy
16	Khasta Kookies	Eclairs
17	Jack Nack	Hunny Bunny
18		Goodlife Dairymilk
19		Frutika
20		Kiddo
21		Pop Rocks
22		Rochak Candy

Table 2 Product Offering: Asian Biscuit and Confectionery

(Confectionery, 2018)



Figure 6 Products of GBC

(Pinterest, 2017)

1.2. Organizational Structure

Hierarchy		
S.N.	Designation	Level
1	President	Executive Manager Level
2	Joint President	
3	Vice President	
4	Senior General Manager	Higher Manager
5	General Manager	
6	Additional General Manager	Senior Manager
7	Deputy General Manager	
8	Senior Manager	
9	Manager	Manager Level
10	Deputy Manager	
11	Assistant Manager	
12	Senior Officer/Sr. Engineer/ Sr. Chemist/Sr. Food Tech	Officer Level
13	Officer/Engineer/Chemist/ Food Tech	
14	Assistant Officer/Asst. Engineer/Asst. Chemist /Asst. Food Tech	
15	Junior Officer/Jr. Chemist/Jr. Engineer	
16	Assistant Junior - Chemist/Sr. Foreman	
17	Sr. Assistant/ Intermediate Trainee Chemist / Foreman	Assistant Level
18	Sr. DG Operator, / Sr. MW Fitter/Sr. Rigger/ Jr. Foreman, Fabricator, Assistant	
19	Sr. Electrician, Sr. Mechanics, Time -Keeper, Sr. Attendant, High-Pressure Welder, Sr. Rigger, Sr. Structural Fitter, MW Fitter, Junior Assistant, Sr. Gauser, DG Operator	
20	Electrician, Sr. Plumber, Mechanics, Sr. Driver, Heavy Driver, Operator, Gauser, Sr. Tester, Attendant, Fitter, Sr. Welder, Rigger, Turner, Machine Tool Operator(MTO)	Highly Skilled
21	Driver, Plumber, Welder, Gas Cutter, Jr. Electrician, Driller, Miller, Tester, Jr. Rigger, Asst. Attendant, Jr. Fitter, Jr. Mechanic, Trained Cook, Asst. Gauger, Asst. Operator, Asst. MTO	Skilled
22	Jr. Plumber, Tack Welder, Khalasi, Asst. Tester, Material Handler, Jr. Operator, Jr. MTO, Jr. Attendant, Jr. Gauger	Semi-Skilled

23	Helper, Jr. Tester	Unskilled
24	Office Boy, Sweeper, Gardener, Peon, General Worker, Lab boy	

Table 3 Organizational Hierarchy



1.3. Statement of the report

This report focused on the market analysis of FMCG products of Asian Thai Foods, Goodlife Beverage, Goodlife Biscuit and Confectionery. This study covered the assignments that were accomplished during 3 months co-operative education period as a marketing intern.

1.4. Objectives of the study

Every study is conducted to acquire some knowledge and understanding. This study was also carried out:

- i. To understand the juice and noodles industry of Kathmandu Valley.
- ii. To visit the market and know about the retailer's viewpoint.
- iii. To know the product availability of ATF Noodles.
- iv. To understand consumer behavior of Nepalese Juice industry.

1.5. Expected outcomes

- i. Knowledge about the Nepalese Juice and Noodles industry.
- ii. Insight about the juice market can be known.
- iii. Market share of ATF Noodles can be figure out.
- iv. To launch new product line.

1.6 Limitation of the study

This report focuses on the market analysis of juice and noodles industry of Kathmandu Valley, Nepal. To carried out market analysis, survey was conducted where target audiences are retailers and end consumers. A set of questionnaires was prepared and that questionnaire was asked to the random retail stores of the specific location assigned by the company to extract information.

There are some limitations of the study which are pointed below:

- i. Retailers are not actively participating and cooperating in the survey.
- ii. A high traffic in Kathmandu valley caused some problems while visiting retail stores for survey.
- iii. It was very time consuming and stressful to convince retailers to conduct a survey as they are not willing to answer the questionnaire.
- iv. The research was confined to Kathmandu Valley so, the data and findings of this study may not be applicable to other parts of the country.

Short time span.

Chapter 2 : Literature reviews

2.1. Brand Management

There is a lot of confusion about branding. Decades ago branding was defined as a name, logo, symbol, sign or design, or a combination of these elements that identify products or services of a company. The brand was identified by the elements that differentiate goods or services from the competition. But today the meaning of brand has changed and it is a bit more complex and most important part of the marketing. (LAKE, 2018)

Brand management is the development of brand perception in the market. Basically, developing a positive and healthy relationship with the target market is the must for brand management. It encompasses all the aspects of customer's association and relationship with buying process which includes tangible elements and brand experience. It is an important aspect of marketing, which utilizes sophisticated techniques to boost the value of a product. (Schmidt, 2018)

Brands have never been more important than today. Branding has been so successful that companies are now replacing their corporate visions and missions with brand mission and visions. Branding has become the most integral part of any company's life. (Temporal, 2010)

Coke and Apple Inc. are those companies who have adopted successful branding strategies. Due to their strategies, they have been successful to lead the industry and to secure their image. If we see these brands establishment date then these brands are very old but till date they are ruling the industry. These brands never failed to adopt different branding strategies. They made themselves updated as per the external environment.

Brand equity are the assets and liabilities liked to a brand. It allows additional cash flows and customer's positive attitude towards a brand. It adds value to the product or service provides. Basically, it is the combination of brand value drivers and brand strength drivers. The definition of brand equity according to "Kirti Dutta's Brand Management book" (Dutta) is the set off associations and behaviors on the part of a brand's customers, channels members and parent corporation that permits the brand to earn greater volume or greater margins than it could without the brand name, and that gives the brand a strong, sustainable and differential advantage over competitors. The benefits of building brand equity are:

- i. It has positive influence on market power.
- ii. It enhances anticipated confidence during purchase.
- iii. It increases satisfaction with the brand.
- iv. It allows brand extensions.
- v. It increases loyalty towards brand.
- vi. It is one of the most valuable intangible assets. It assures long term cash flow which improve profit scenario. (Dutta)

If we talk about branding strategies then we can find lots and lots of strategies that companies are adopting.

Packaging:

In marketing, we studied various P's- Product, Price, Place, Promotion, People, People and Physical Evidence, one of the most important elements in the marketing mix is promotions. And lately, packaging has become a strong element of the Marketing mix. The role of packaging is very important in Marketing and sales. (Bhasin, 2018)

Product packaging plays an important role in consumer decisions. It communicated many things, from what the product can do for consumers to create value. It is considered as the crucial marketing and communication tool for any business. It is not only the face of the company but also it differentiates a brand from competition and creates brand recognition.

It is an integrated marketing strategy to glamorize a product in order to attract the consumer's attention. Many consumers used to judge a product by its packaging before making the buying decision. Thus, packaging should be attractive, compelling, clear, informative and easy to handle. (AS ADVERTISING, 2018)

Competitor Analysis:

There are various activities that need to be done or considered to operate the business smoothly. In the process of business operations, business organizations have to include certain analysis. The business does a SWOT analysis to find out the strengths and weakness of the company. It also manages to identify possible threats and opportunities the business might face due to external factors. SWOT analysis enables the company to better understand themselves and develop the strategies to grab the opportunities by converting their weakness into strength eliminating the possible threats. A marketing competitor analysis is a crucial part of marketing strategy. It leads the company to run smoothly. Basically, it is done with relation to competitors. Thus, we can also say it competitor analysis where the company gets chance to assess the strength and weaknesses of the competition. Competitor analysis helps the company to secure its position and take corrective or innovative actions. Competitor analysis involves PEST analysis, Competitor Array. PEST analysis stands for Political, Economic, Social and Technological factors. The purpose of PEST analysis is to identify all of the various external factors that might affect a business. Competitor Array is used to determine the marketing competitor analysis (Contributor, 2015)

Job Description:

- i. Performing market research through interviews and surveys.
- ii. Prepare strategy and marketing plans.
- iii. Design and develop branding ideas.
- iv. Assist in new product development process.
- v. Develop new creative packaging concepts

Basically, this internship involved the activities of marketing department where branding and marketing concepts were an integral part of it.



Chapter 3 Methodology

Roles and responsibilities as a Marketing Intern were:

- i. To gather market information by conducting the survey.
- ii. To conduct competitive market analysis and research.
- iii. To involve in branding part.
- iv. To develop new packaging concepts
- v. To develop creative and new branding ideas.
- vi. To assist my supervisor in designing promotional activity.
- vii. To develop dummy for the new product.
- viii. To seek and analyze competitor marketing material and activities.
- ix. To prepare the promotional presentation.

3.1. Project details

This research was conducted to understand the consumer preference, their buying pattern, and behavior.

- i. Field Survey of Goodlife Beverage was conducted in order to extract information about the Nepalese Packaged Fruit Juice Industry, to know the market players and to do competitor's analysis. I prepared a set of questionnaires and select the location of Kathmandu Valley to conduct research. The population of this survey was retailers and sample size was 63 retail stores. Also, the same survey with different questionnaire was conducted among the consumers or the random people to know the consumer's taste, preferences and buying pattern where my sample size was 76 consumers.
- ii. I was assigned to conduct a field survey of Asian Thai Foods to know the sales and consumer preference for the products. The sample size of research was 188 retail stores.

3.1.1 Methodology

This chapter discusses the research design, sample selection, instrument for data collection, data analysis, and tools

3.1.2 Sample Selection:

Beverage:

From consumer's perspective, online questionnaire form was used. Students, working Professionals of an age group of 20-30years were selected. The sample size was 76 people which involved 48 males and 28 females.

From retailer's perspective, random shops and stores of few selected areas of Kathmandu Valley involving 3 districts of Nepal were chosen. The sample size was 63 retail stores.

Noodles:

Random shops and stores of few selected areas of Kathmandu Valley involving 3 districts of Nepal were chosen. The sample size was 188 shops.

3.1.3 Data Collection:

The report is based on both primary and secondary data.

Primary data:

The survey and questionnaire method were used for this research. A set of questionnaires which was to be asked to the consumers and retailers were prepared and approved by the intern supervisor before visiting the field and conducting market survey.

For this research, 188 stores were visited to extract information about the noodles industry while 63 juice shops and cold stores were visited and 76 individuals were involved in this survey to extract information about the Beverage Industry. By this method of collecting information, both qualitative and quantitative data were obtained i.e. the top 3 players of juice and noodles industry, customer's preferences, and factors affecting the consumer behavior.

Primary data is collected through:

- i. Survey
- ii. Questionnaire
- iii. Online Survey

Secondary data:

Secondary sources were also used to collect information and enhance this research.

Secondary data is collected through

- i. Competitor's official website and Facebook pages.
- ii. Internet

3.1.4 Data Analysis and Tools:

Data Analysis in this report has done with the use of Microsoft Excel. Raw data extracted from surveys are converted into meaningful information with the use of Microsoft Excel. The findings of the surveys are displayed with the help of bar graph and pie chart in Microsoft Excel.

Chapter 4: Results and Discussion

This chapter covers the contributions made by me during my internship period.

4.1. Contributions made during the internship

Under department of Marketing, work related to branding and marketing was assigned to me. During this period, I was able to gain a good practical exposure in various sectors of fast moving consumer goods (FMCG).

My contribution in Asian Thai Foods (P) Ltd. was:

- i. Direct involvement in new product development process.

Actively participated in various stages of new product development (NPD) i.e., idea generation, idea screening, concept development and testing.

- ii. Concept for branding and marketing.

Involved in rebranding of existing brand based on demand study and similar products in the market. Design, shape and style of packaging was revised during the process of rebranding. In addition, scheme and offer was provided to boost the sale as per the marketing strategy.

- iii. Checking the standard of packaging

Involved in the finalization of the packaging cover of the products. Responsibility was to check all the nutritional information, address of the company, size of the product, paneling, sealing area, ISO Mark and SFA Marks, tm/r mark, bar code, logo, spelling correction, and other standard set by the company and Food Associations of Nepal.

- iv. Formation of Dummy

After the completion of proof reading of flexible laminate, dummy was made and the design was sent to the plant for the production.

- v. Market survey on the market of juice in Kathmandu.

Market survey was conducted to know dominating company and their marketing strategy in fruit juice market. Result from the study helped to understand better about the market size, consumer preferences, demand and competitors' promotion activity in Kathmandu Valley.

- vi. Research on the market share of Asian Thai Foods (ATF) products.

Market survey was conducted to know the market share and market standing of ATF.

4.2 Result of Research

1. Asian Thai Foods

Visibility of ATF products in the market

Total shops surveyed (Sample Size): 188 shops

S.N.	Area	Availability of ATF products (Nos.)	Total Visited shops
1	Dhumbarahi	22	24
2	Maharajgung	9	10
3	Laximpat	7	8
4	New Buspark	13	24
5	Basundhara, Gairidhara	26	28
6	Maitidevi, Ghattekulo, Gyaneswor	13	16
7	Chabahil	7	10
8	Anamnagar	7	8
9	Bagbazar	35	38
10	Gongabu, Samakhusi	18	22

Table 1 ATF Market Availability

From the above table, we can clearly state the products are widely visible in the market since, out of visited number of shops in various areas, availability of ATF's products are quiet higher.

2. Goodlife Juice

Goodlife Juice was in its product launching phase. Thus, the company wanted to know the juice industry and competitor's market. For that survey was conducted from the perspective of consumers and also from the perspective of retailers. From the consumer's perspective, aim was to know their preference and buying pattern. While from retailer's perspective aim was to know the competitor's activity and market size for the fruit juice.

what comes in your mind when you think of juice?

76 responses

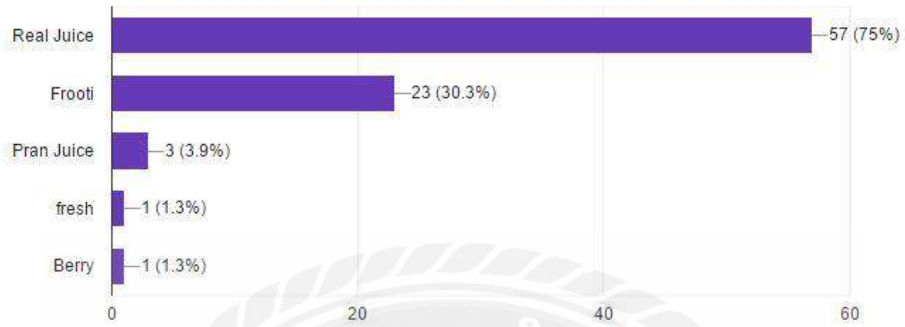


Figure 1 Online survey Result

Which flavor you like the most?

76 responses

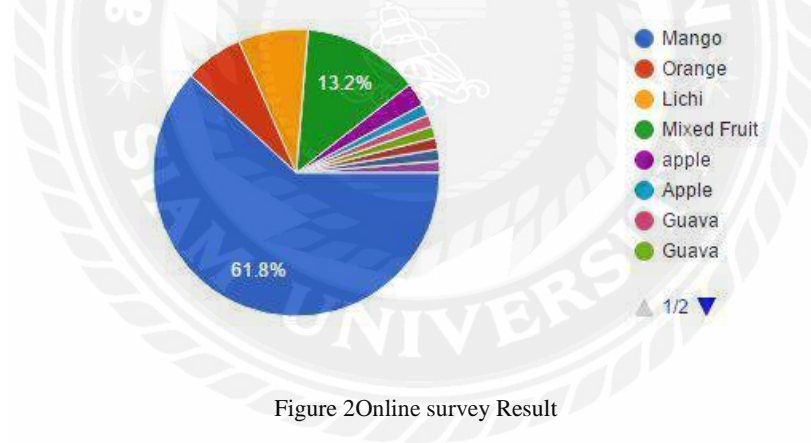


Figure 2 Online survey Result

Which pack of juice you buy mostly?

76 responses

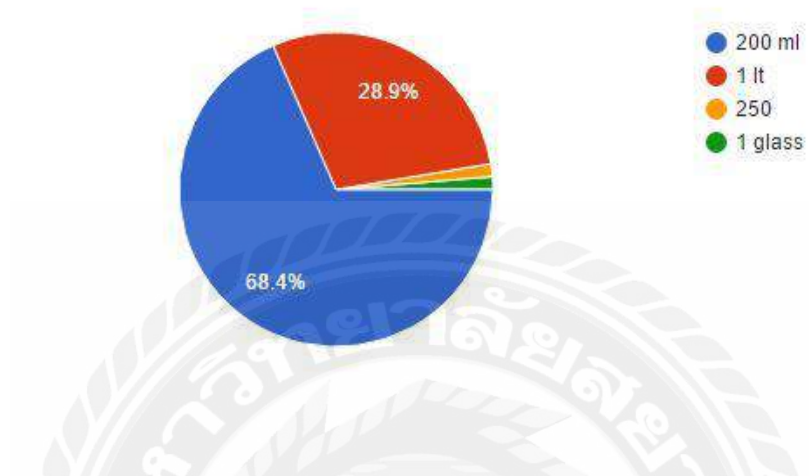


Figure 3 Online Survey Result

Does promotional activities influence your buying behaviour

76 responses

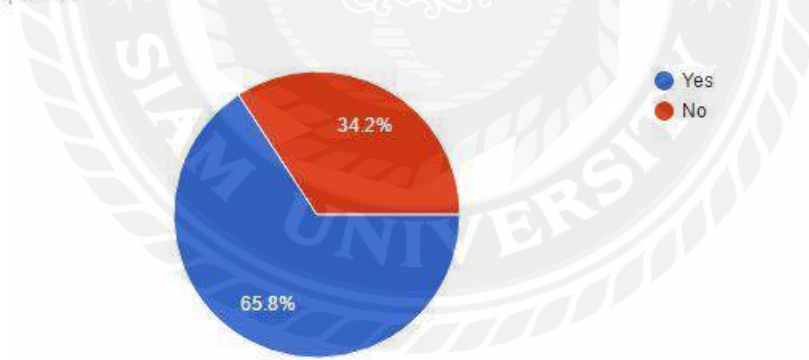


Figure 4 Online Survey Result

Which media affects your purchase?

76 responses

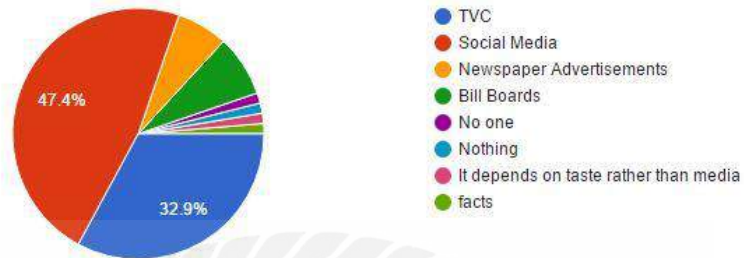


Figure 5 Online Survey Result

The results from online survey are:

- i. 75% of consumers prefer Real Juice than Frooti, Pran and other brands.
- ii. 62% consumers like Mango flavor while 14% like Guava.
- iii. 69% consumers mostly buy 200ml tetra-pack juice.
- iv. 66% consumers thought that promotional activities won't influence their buying behavior.

47% consumers said that Social Media affect their purchase while 33% chose TVC.

Chapter 5: Conclusions

5.1 Self-assessment as future professional

Co-operative education is the bridge between theoretical knowledge and practical work. The hands on experience the intern receives cannot be gained in the four walls of classroom. Internship enables the students to implement their theoretical knowledge into practical work settings. Internship makes the students more professional.

Co-operative education in ATF was a great experience which allowed to better implement theoretical knowledge into workplace and better understand how the organizations runs. This internship not only helped to enhance gained knowledge but also provided a platform to connect with the real workplace and build networking.

Internship helped to know and learn more about myself including my strength, weakness, interest and capabilities. The feedback and guidance from the supervisor and other established professional offered a unique learning opportunity. During internship period, interns are surrounded by professionals. it is more than just earning credits and scoring good grades, it provides an platform to make connection and networking which is required after the graduation.

The techniques, strategies learned in the classroom were practically implemented during internship which boosts the knowledge. Also, the confidence in professional environment is improved.

5.2 Comparison of practical learning VS theory

In theory, we learned about the definitions, concepts, and steps while in practical learning I got chance to implement those theories into practicality and understand how the real business works and it also lead to a deeper understanding of a concept through personal experience. In theory we were not able to feel the real situation while in practical learning I experienced day to day work.

The theories that we learnt is not remembered throughout entire life but the jobs that I performed during my internship are always remembered and stays in my mind for long. Practical learning enhances and improved the skills while theory can only provide ideas and concepts. Practical learning also leads me to work in team and manage time. The main important thing that practical learning creates is the contacts and connections which is totally impossible through theory. Such contacts and networks are very important for the future job opportunities.

Practical learning gives the taste of real world while theory only provides concepts and ideas.

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Appendices

Questionnaire for Goodlife Beverage:

For consumers

1. What comes in your mind when you think of juice? i. Real Juice <input type="checkbox"/> ii. Frooti <input type="checkbox"/> iii. Pran Juice <input type="checkbox"/> iv. Rio <input type="checkbox"/> v. Others _____
2. Which flavor you like most? i. Mango <input type="checkbox"/> ii. Orange <input type="checkbox"/> iii. Litchi <input type="checkbox"/> iv. Apple <input type="checkbox"/> v. Others <input type="checkbox"/>
3. Which pack of juice you mostly buy? i. 200ml <input type="checkbox"/> ii. 1Liter <input type="checkbox"/>
4. Does promotional activity influence your buying behavior? i. Yes <input type="checkbox"/> ii. NO <input type="checkbox"/>
5. Which media affects your purchase? i. TVC <input type="checkbox"/> ii. Social Media <input type="checkbox"/> iii. Newspaper Ads <input type="checkbox"/> iv. Bill Boards <input type="checkbox"/> v. None <input type="checkbox"/>

For Retailers

Name:

Address:

Contact No.

1. Availability of Brands in your store?

1. Real	<input type="text"/>	2. Pran	<input type="text"/>	3. Goodlife	<input type="text"/>
4. Rio	<input type="text"/>	5. Frooti	<input type="text"/>	6. others	<input type="text"/>

2. Highest selling brand? 200ml or 1 liter?

1. Real	<input type="text"/>	2. Pran	<input type="text"/>	200ml	<input type="text"/>
3. Frooti	<input type="text"/>	4. Rio	<input type="text"/>	1litre	<input type="text"/>
5. Goodlife				<input type="text"/>	

3. Do customers ask for any specific brand? Which Flavor?

1. Yes	<input type="text"/>	1. Real	-----	2. Frooti	-----
2. No	<input type="text"/>	3. Pran	-----	4. Rio	-----

4. From where do you buy juices?

1. Retailing Van	<input type="text"/>	2. Dealer/ Distributors	<input type="text"/>	Wholesaler	<input type="text"/>
In how many days van visit store?		Visit Store?	<input type="text"/>	Do they visit store?	<input type="text"/>
Delivery Time (Days)	<input type="text"/>	Delivery Time (Days)	<input type="text"/>	Delivery Time (Days)	<input type="text"/>

5. Have you received any offers, Schemes, Discounts from any brands?

6. How many Cartoons do you sell in a month?

1. 200ml Tetra pac	<input type="text"/>	1. 200ml Tetra pack	<input type="text"/>	Bottle	<input type="text"/>
2. 1litre Pack	<input type="text"/>	2. 1litre Pack	<input type="text"/>	Others	<input type="text"/>

7. Any suggestions to the Juice Manufacturing company?

Researched By: Manohar Manandhar

3.1. Dummies Developed during Internship period



Figure 1 Dummy of Digestive Oats



Figure 2 2Minute Mazza



Figure 3 Preeti White Noodles



Figure 4 Preeti Noodles Family Pack



Figure 5 Kiddo



Figure 6 Mini Treat



Figure 7 Choco Lava



Figure 8 Sugar free



Figure 9 Digestive Gold



Figure 10 Preeti Noodles Meal Pack



Figure 11 Preeti Noodles



Figure 12 Treat Joy



Figure 13 Mt.8848



Figure 14 Colleague

Bibliography



Name-Surname Manohar Manandhar

Student Id 5708040049

Email manohar2018@kcm.edu.np

Department Marketing

Faculty BBA

Address Itahari, Sunsari, Nepal

Special interest Bike riding, Cooking, Talking, Repairing electronics.

