



grow
BEYOND
Better

TEAM Rx



ARJUN K K | CHITRA NAIR | SANGEETH K



Overview of Problem Statement

Customer Insights & Market Analysis

Product Development

Go-to-Market Strategy

Financial Projections

Appendix

MISSION

Building Tata Sampann as a Masterbrand in the Indian pantry, while staying true to the essence of Indian culinary traditions

WHY BIRIYANI MASALA?

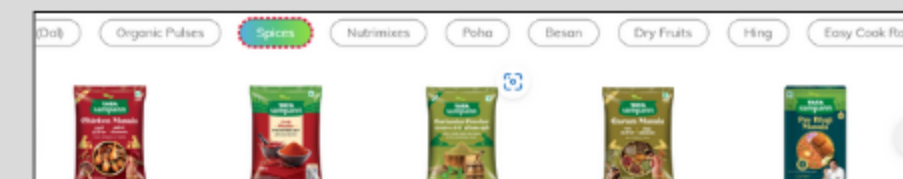
Introducing Biryani Masala Mix into this portfolio aligns seamlessly with its brand ethos for the following reasons:

Consumer Demand

Market Opportunity

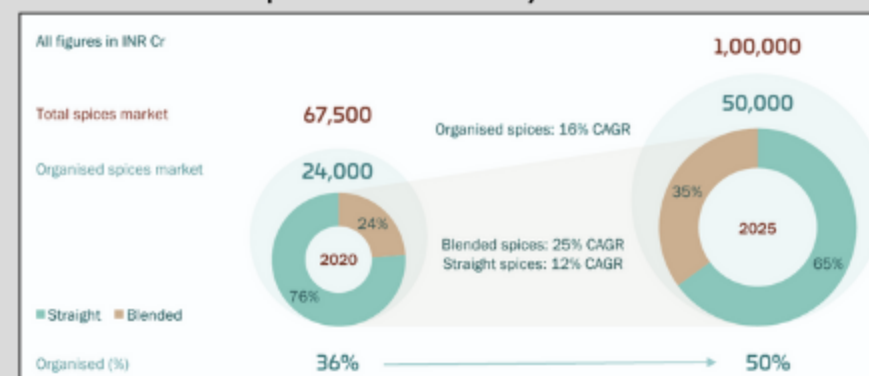
Portfolio Synergy

TATA Brand Equity



MARKET ANALYSIS

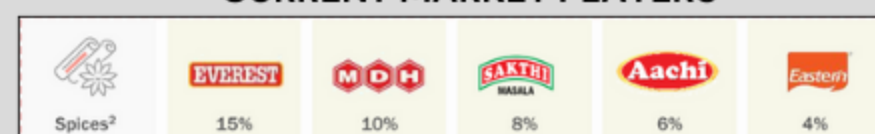
The Indian blended spices market is growing rapidly and is set to capture 35% of the organized spices market by 2025.



HIGH GROWTH IN BLENDED SPICES

- Increased need for convenience
- Region-specific blends
- High brand stickiness leading to higher margins
- Various options available across cuisines

CURRENT MARKET PLAYERS



CASE GOALS

Product which focus on ideas across the three pillars:
Premium but affordable,
Simplify daily cooking,
Financial viability for TATA

INDIAN POPULATION AND BIRIYANI

Biryani sets new record again, remains India's favourite delicacy

Even Swiggy's annual trends report (formerly StatEATstics) has biryani set new records with 137 biryanis ordered per minute.

Written by **Vaishali Dhar**
January 7, 2023 15:41 IST



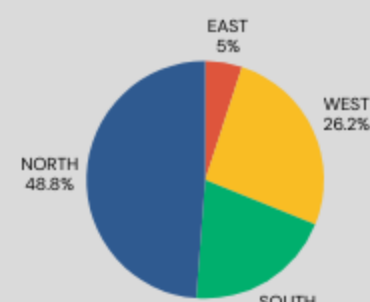
MARKET SURVEY CONSUMER PROFILE



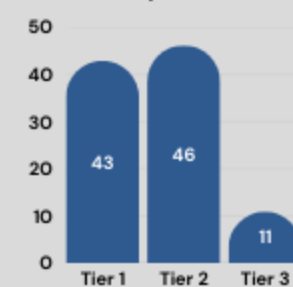
Home Makers



Working professionals/
Bachelors/ Students



Geographical



City Tier

CONSUMER PAIN POINT INSIGHTS

- Availability Issues
- Inadequate Packaging
- Diminished Aroma
- Limited Transparency
- Unreliable Brands
- Authenticity Concerns
- Lack of convenience with separate spices

IMPACT THAT TATA CAN CREATE

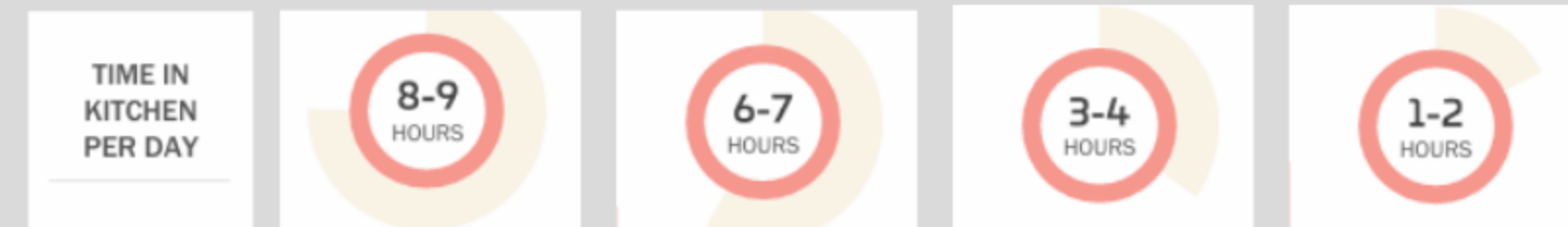
- Tata's portfolio enhancement.
- Growth in the target market driven by convenience.
- Enhanced customer satisfaction.
- Ensures safety and trust.
- Brands with poor quality will exit the market

PROBLEM OBJECTIVE

Launching a new product, customizable **Biriyani Masala Mix**, in the blended spices segment of Tata Sampann, designed to address the current challenges faced by consumers



RISING NEED FOR CONVENIENCE WILL DRIVE PRODUCT INNOVATION



10 YEARS BACK

PRESENT DAY (CONVENIENCE) 10 YEARS FORWARD

KEY CONSUMER INSIGHTS

80.3%

of respondents expressed trust concerns with the current brand and would prefer Tata if they launched this product

57.1%

of consumers have switched to alternative brands, highlighting potential dissatisfaction or unmet needs with their current choice

81.5%

of consumers refrain from cooking biryani, primarily due to time constraints and the lack of convenience

CURRENT CHALLENGES IN THE VALUE CHAIN MAPPING



Inbound Logistics

- Inconsistent spice quality due to sourcing challenges



Outbound Logistics

- Poorly designed packaging that fails to appeal
- Deterioration of spice quality and aroma during distribution



Operations

- Lack of traditional flavor and regional authenticity
- Inability to deliver desired taste profiles



Marketing and Sales

- Insufficient product details
- Insufficient ingredient transparency on packaging.

Literature Review & Secondary Research

Market Research

Spices present a ~₹50,000 crore opportunity, with blended spices growing faster than straight spices. By 2025, blended spices are expected to capture 35% of the organized market, driven by higher margins (40%+) and robust 24% CAGR.

After MDH and Everest controversy, Centre orders all state governments to test spices for quality check

IBEF

INDIA BRAND EQUITY FOUNDATION

HOME

ABOUT US

INDIAN ECONOMY

INDUSTRY

STATES/UT

EXPORTS

BLOG

CONTACT

MORE

Ready-made mixes

"All these brands have focused on product packaging, product customisation to local taste and positioning around quality. They have also ensured innovative marketing strategies for high brand recall," said Reetesh Shukla, Associate Director, Food Services, Technopak.

Increasing urbanisation paired with a rise in number of working women has reduced the time of cooking.

Consequently, home-makers have started demanding ready-made spice mixes such as sabzi masala, garam masala, chicken masala etc.

This has augmented industry revenues, officials said, as both spice mixes and branded spices entail greater profit margins, as compared to straight and unbranded spices.

Biryani holds strong, Pizza's popularity dips; Zomato, Swiggy reports reveal India's changing food preferences

Biryani remained the favourite on Zomato with over nine crore orders in 2024. But it saw a decline of nearly a crore orders compared to 2023.

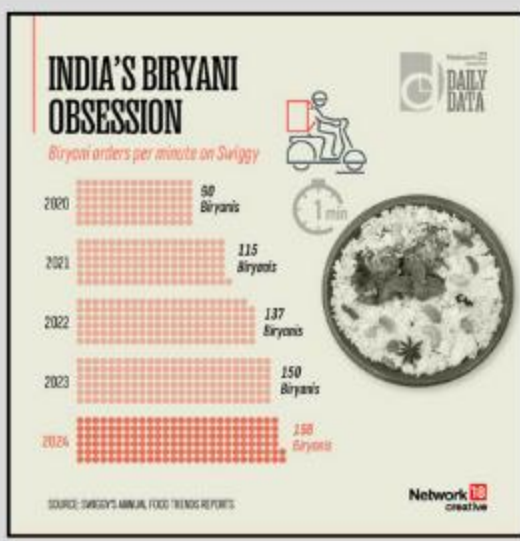
FSSAI launches probe into MDH and Everest products

TOI

The Times Of India

@timesofindia

In response to quality concerns raised by Singapore and Hong Kong regarding Indian spice products, the Food Safety and Standards Authority of India (FSSAI) has started taking samples of spices in powder form of all brands, including #MDH and #Everest, from across the country.



Primary Research (Google Form Responses)

119 responses

Customer Profile & Behaviour

"How often do you cook biryani"



"Have you ever switched from one brand to another? If yes, what made you switch?"

Consumers are open to switching their biryani masala brand, influenced by factors like peer recommendations, cooking experience, superior quality, and authentic taste.

Have you ever avoided cooking biryani due to time constraints or the lack of convenience?



Bachelor Working Professional

Which consumer group do you belong to?



Homemakers & cooking for Family

Which age group do you belong to?

Loves cooking Biryani | busy | prefers convenient and fast cooking methods

Biryani for the family | authentic | clean and safe ingredients

Consumer Reviews

r/IndianFood

3 mo. ago

Proof_Bal9697

What can I do with MDH's Bombay biryani masala? It's too spicy and overpowers everything.

really don't like this stuff. Everything I put in it just ends up overpowering all the other spices and it's way too spicy. Even just 1 teaspoon can be overbearing. Even when I use EXTRA cardamom, it seems I can barely taste it with the Bombay biryani masala.

Is there anything I can make with this stuff that would accentuate the flavor of the masala, instead of just overpowering all the other flavors? The actual spice blend itself is not bad. I just can't think of anything to make with it. I'm thinking something potato related but I'm open to anything. I just want to use it up and not buy it again.

AvailableFalconn

4 mo. ago

Organic and whole spices are not free of nasty chemicals unfortunately. Consumer reports recently measured levels of lead in various spice brands, and found many brands had high levels, and it wasn't consistently the non-organic ones or even consistent within the same brand.

12

Reply

Award

Share

StableGenius81

4 mo. ago

This is disturbing to hear, but not surprising, I suppose. Toxic chemicals and microplastics are literally in everything these days.

3

Reply

Award

Share

Arup Sengupta Assam

Verified Purchase

Good product

Reviewed in India on 24 October 2017

Size: 100gm.

Nice for the first few days but for prolonged intake you may not like the taste as it happened to me. Product is send in good condition and received before time.

Tabraiz

Verified Purchase

Three Stars

Reviewed in India on 19 September 2015

Size: 50 g (Pack of 1)

Goods but it is not authentic Awadhi(Lucknows) or Hyderabadi Biryani

9899422258

Verified Purchase

One Star

Reviewed in India on 2 June 2018

Size: 100gm

Pathetic very strong. Better to have elaichi powder made at home this is very bad.

TS

Verified Purchase

don't its just me.. or it doesnt taste ...

Reviewed in India on 20 July 2016

Size: 50 g (Pack of 1)

don't its just me .. or it doesnt taste original ...

Recent detection of carcinogenic pesticides like ethylene oxide in popular masala brands, including MDH and Everest, along with high pesticide levels in Rajasthan spice mixes, has raised safety concerns and eroded consumer trust. Customers also view current biryani masalas as repetitive and lacking authenticity in flavor.

Customer Needs and Preferences

"What is the specific flavor you prefer in your homemade biryani?"



“How do you rate the following factors for your current biryani masala”

Customers are expressing dissatisfaction and are seeking improvements	
Authentic Taste	64%
Packaging	63%
Aroma	66%
Availability	61%
Price	71%
Storage	69%

Customers are satisfied and prefer them	
Authentic Taste	36%
Packaging	37%
Aroma	34%
Availability	39%
Price	29%
Storage	31%

Majority of customers are dissatisfied with their current brand of biryani masala in terms of lack of authentic taste, aroma, proper packaging, availability affordability or storage.

“Do you feel existing biryani masalas lack originality for your special flavor?”

70% Customers think their current brand of biryani masala lacks originality in the flavor

“Have you ever had trust concerns with any biryani masala brands? If a trusted and reliable national player like Tata offered biryani masala, would you consider trying it?”

80% There's significant demand for Tata Sampann biryani masala in the market, as customers are actively seeking a reliable, premium brand they can count on and they strongly trust Tata Sampann's commitment to quality and food safety.

“If you have used Tata Sampann's products before, what did you not like about it?”

Customers' unappealing aspects about Tata Sampann products	Count	Percentage
Less awareness	21	28%
Taste/Flavor	14	19%
Affordability	11	15%
Aroma	9	12%
Quality	6	8%
Availability	5	7%
Not very spicy	4	5%
Advertising	2	3%
Souring taste	1	1%
Spice level	1	1%
Grand Total	74	100%

Customers identified the most unappealing factors about Tata Sampann products as the lack of awareness and the taste/flavor of the masalas, which can be improved.

Ansoff Matrix – Product Development

	New Markets	Existing Product	New Product
Existing Markets	<p>MARKET DEVELOPMENT</p> <p>Tata Sampann can introduce regional and local variants, but first, it needs to build a strong household identity by addressing the lack of value-added brand recognition.</p>	<p>MARKET PENETRATION</p> <p>Tata Sampann can expand into rural markets with value packs, but its current premium image and focus on convenience may conflict with this market penetration strategy.</p>	<p>DIVERSIFICATION</p> <p>Tata Sampann can diversify by fortifying dals and spices for the premium health segment, but it's financially unfeasible currently.</p>
	<p>PRODUCT DEVELOPMENT</p> <p>Customizable Biryani Masala: New personalization product targeting existing Tata Sampann customers seeking convenience and flavor options.</p>		

Pure High Quality Ingredients from existing Tata Sampann portfolio

Tata Sampann is renowned for its commitment to quality and authenticity, ensuring that every ingredient is carefully selected to meet the highest standards. The customizable biryani masala leverages this trusted portfolio, incorporating premium spices and ingredients to deliver an exceptional culinary experience.

Ingredient Sourcing:

- Use high-quality ingredients from Tata Sampann’s trusted portfolio.
- Key ingredients: Turmeric (rich in curcumin), chili powder (for heat), coriander seeds (balanced flavor), tamarind (tanginess), and cumin (for aroma and flavor).



Product Development

Which brand of biryani masala do you currently use?

Eastern, Everest, are the brands are preferred by 54% of respondents



Detailed Ingredient Analysis in Appendix

EVEREST	EASTERN
Black Cardomom	Bay leaf
black pepper	Black Pepper
Caraway	Cardamom
casia Bark	Chilli
Casia leaf	Cinnamon
Chilli	Clove
Clove	Coriander
Coriander	Cumin
Cumin	Fennel
Dried fenugreek leaf	Iodized Salt
Green Cardomom	Kashmiri Chilli
Mace	Nutmeg
Nutmeg	Turmeric
Turmeric	

Base Masala Idea

Based on the in-depth analysis of the ingredients used by these three brands, it is feasible to develop an ideal **base masala** that caters to the preferences of the majority of consumers. This formulation can effectively address key consumer concerns such as maintaining authenticity, preserving originality, and enhancing taste, ensuring a satisfying and consistent experience for a wider audience

Add-On Sachet Idea

The addon sachet for enhancing aroma and spiciness can be crafted using ingredients like **Star Anise, Green Cardamom, Clove, Nutmeg, Red Chilli, and Black Pepper**. This allows consumers to customize the flavor according to their preferences

FEEDBACK

70% of consumers reported a lack of originality in the masala they use, while 65% highlighted issues with both aroma and authentic taste.

PAIN

Quality and aroma loss during transit

SOLUTION

Dynamic Stock Reallocation

Retrieving stock from low-sales regions and redistributing it to high-demand areas, ensuring that earlier batches are prioritized for sale

(IoT) in Supply Chain

Sensors can monitor key parameters such as temperature, humidity, and seal integrity to maintain optimal conditions, ensuring the masala's aroma and freshness are preserved

Direct-to-Consumer (D2C) Channels

Utilize online platforms for direct sales to enable faster delivery and minimize shelf time, ensuring fresher products reach consumers more efficiently

80% of respondents expressed a lack of trust in existing brands

Limited transparency across the value chain

Spice sourcing journey

Link the QR code to a page that shows the sourcing journey of the spices, from the farm to the packet

Manufacturing transparency

Offer a behind-the-scenes view of the manufacturing process through videos or infographics

Cooking tutorials

Include recipes, cooking tips, or video tutorials to enhance customer engagement

Customer feedback

Allow customers to leave reviews or feedback directly through the linked page

Build Credibility

Provide links to certifications like FSSAI, ISO, or USDA Organic to reinforce trust.

Most customers are unaware of Tata Sampann products, despite some reach through online and offline advertisements.

Channels to reach Customers	Count	Percentage
Not aware	48	40%
Online/Offline Advertisements	44	37%
Word of Mouth	19	16%
Experience	4	3%
Brand Trust/Loyalty	4	3%
Grand Total	119	100%

MEDIA	Count	Percentage
Advertisement	62	53%
Word of mouth	29	25%
Others	27	23%

Reveals that 78% of the respondents became familiar with the current masala brand primarily through **advertisement** or **word-of-mouth** recommendations.

CONSUMER JOURNEY

AWARENESS STAGE

INTEREST STAGE

CONSIDERATION STAGE

PURCHASE STAGE

RETENTION STAGE

Collaboration

Brand Story

Billboards

Social Proof

Aroma Marketing

Cooking Demos

Product bundle:

Product Availability

Share your feedback

Partnering with YouTubers to showcase and promote the brand.

Village Cooking Channel

@VillageCookingChannel • 27.3M subscribers

Village grandpa cooking traditional village food, country foods, and tasty recipes for foodies, children, villagers, and poor people.

Kabita's Kitchen

@KabitasKitchen • 14.2M subscribers

Simple, Easy and Authentic Indian Recipe :) My name is Kabita Singh, I am the host of this channel (kabitaskitchen). I focus on ...

Billboards in Tier 1 cities in partnership with Q-commerce platform

Your Taste, Your Biryani!

Start with a Base and Finish with a **Twist!**

TATA Sampann Biryani Masala

With an Add-On Spice Mix

Ensuring availability through Q-commerce platforms for Tier 1 cities and kirana stores for Tier 3 cities

Advertise in food magazines to target high-income consumers. Emphasize the product's premium quality and unique value propositions

Showcase the origin, cultural heritage, and family traditions behind the biryani masala blend. Connect with the target audience through traditional TV advertisements and social media

Host live supermarket events showcasing biryani recipes with your masala, offering consumers a chance to taste

One-time trial packs of biryani masala bundled with cooking essentials, allowing consumers to experience and adapt to the new product

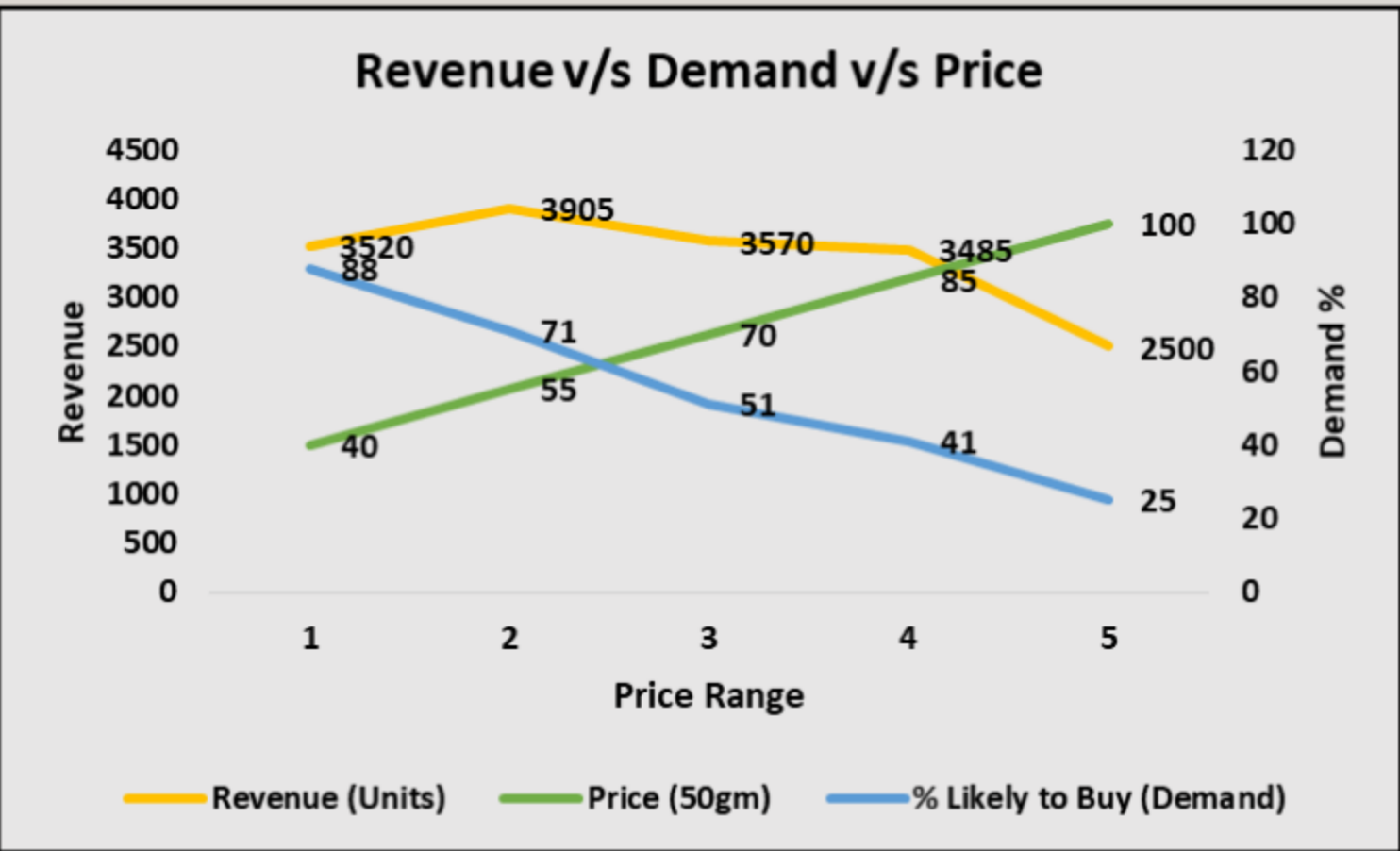
Detailed Analysis in Appendix

As a new addition to our portfolio, we utilized the **Gabor-Granger pricing method** to assess consumer willingness to pay and identify the optimal price for our Biryani Masala.

Based on an analysis of current market brand prices, we set a price range of ₹40 to ₹100 to evaluate customers' willingness to pay. To achieve this, we designed a survey comprising five targeted questions, adopting a value-based pricing strategy

Considering Tata Sampann provides a high quality, zero preservatives, safe and authentic taste Biryani Masala with a customizable add-on sachet included which enhances your preferred flavours-

Would you buy this Biryani Masala (50g) packet for Rs. 40? Yes/No
Would you buy this Biryani Masala (50g) packet for Rs. 55? Yes/No
Would you buy this Biryani Masala (50g) packet for Rs. 70? Yes/No
Would you buy this Biryani Masala (50g) packet for Rs. 85? Yes/No
Would you buy this Biryani Masala (50g) packet for Rs. 100? Yes/No



After analyzing the responses, we determined the willingness to pay (Demand) and the corresponding revenue potential for each price point, as outlined using the Gabor-Granger pricing method.



Although revenue is highest at ₹55 per 50gm, Tata, as an affordable premium brand, can position itself between ₹70 and ₹85 using a value-added pricing strategy. This approach will enable Tata to generate revenue comparable to the ideal peak revenue by maintaining its premium positioning.

Rationale for this Model

Gabor-Granger offers actionable insights into how a value-added pricing strategy can influence both demand and revenue, while Van Westendorp centers on consumer perceptions, potentially lacking the detailed revenue projections needed for this positioning

PRICING STRATEGY

An analysis of the current market shows that brands like Aachi, India Gate, Eastern, Everest, MDH, and Shan make up 80% of consumer preferences. The average market price among these brands is ₹62.6

Based on this, as mentioned in case Tata is ready to position itself at a premium of up to 30%, setting the maximum price at ₹81

Based on the Gabor-Granger pricing method using the market research data, a price range of ₹70 to ₹85 is found feasible.

TOTAL GUESSTIMATED BIRYANI MASALA MARKET IN INDIA		Units in Crores
Total Indian Population	TOTAL POPULATION	140
Total % of urban population in India	URBAN POPULATION	35%
Population in Urban (Tier1,2,3)	URBAN POPULATION	49
Market reach for Biryani Masala (BM)	MARKET PENETRATION	40%
Market share of the organised sector	ORGANISED SECTOR	50%
Total addressable market of BM	TAM	9.8
Average no of people in a family	AVG Household Size	4
Total addressable household counts	TAM HOUSEHOLDS	2.45
Frequency at which people prefer cooking Biryani	FREQ/Year	12
Total units sale (50gm)	TOTAL SALE (UNITS)	29.4
Average price of a Biryani Masala	MRP/ Packet	62.7
Total market size for Biryani Masala	TOTAL REVENUE	1843.4
So even a 20% market share for TATA can create a substantial market	20%	368.7



[Drive link to clean data & detailed analysis](#)



[Google Form Response Link](#)

Literature Review links : Click-on Icons for resource materials, (Link attached)



TATA CONSUMER PRODUCTS



THE TIMES OF INDIA

