

TERMS OF REFERENCE OF THE PROPOSED MARKET STUDY

Detailed proposal should include

1. brief profile and relevant experience of the consultant / organisation
2. Proposed research methodology and time line
3. Detailed Budget break down / commercials

Terms of Reference for Market Study

Objectives of the study

1. To get insights of consumer's usage, trends and attitude for dairy products in Vishakhapatnam ,Vijayanagaram , Srikakulam , Rajahmundry , Kakinada,Bhimavaram, Eluru Markets catered by Visakha Dairy.
2. To get an indication of size of dairy products in these markets.
3. To understand the competition scenario of the dairy sector and the Sales and Distribution model undertaken by various competitors vis-à-vis the Visakha Dairy.

Project Scope

Consumer Research

Consumer Research is proposed as a usage and attitude study, which shall discover the changing trends in the purchase and consumption of the dairy products of all types. This shall involve quantitative research as well as qualitative research.

This phase is to discover the changes in the following:

- Products preferred by different age groups and the reasons for the same
- Change in food habits that involve dairy products
- Change in consumption patterns – in house & out of home
- Brand preferences by product category
- Criteria used by consumers for selecting a brand over others
- Changes in purchase, storage and usage patterns/behaviour
- Motivators and Barriers for adopting products and brands
- Consumer preferences and new trends in packaging and pack sizes

Indicative Market Size

This shall involve a dip stick study and secondary research to give an indicative market size of the organized dairy market for the following products:

- Fresh milk in plastic pouches
- Extended Shelf Life pouches
- Tetrapack /UHT Milk
- Curd
- Paneer
- Ghee
- Butter milk
- Lassi
- Dairy beverages
- Ice Creams
- Milk based local sweets (Mithai)

Competition Study

This shall involve a dip stick study and secondary research to understand the Sales & Marketing Strategies of the key players in each of these markets.

This part shall cover the following:

- Product Range/ Product Strategy
- Go to market model for each product category
- Marketing Strategy
- Manpower Strategy
- ATL activities undertaken by each brand
- BTL activities undertaken by each brand
- Pricing Strategy and Terms of Trade

This study shall also include the current retail landscape which includes physical as well as online stores across these markets.

Methodology:

Market Size Assessment

This component shall involve the following:

- Secondary Research
- Personal Interviews with trade partners of competitors
- Estimates from related industries

Competition Study

- Secondary Research

- Primary Research through:
 - Personal Interviews with trade partners of competition from all major markets.
 - Personal Interviews with retail trade from all major markets with structured questionnaires (Modern Trade with specific emphasis on quick commerce | General Trade | Online)

At least 300 interviews for each of the above markets with adequate representation from all relevant retail channels of different scale and size.

- Personal Interviews with HoReCa, Tea Vendors, Sweet shops (local 'mithaiwalas') and institutions from all major markets with structured questionnaires.

At least 100 interviews for each market with adequate representation from all relevant segments.

- Estimates from related industries

Consumer Research

This demands both quantitative and qualitative research. The primary research includes:

1. Focus Group Discussions (FGDs)

FGDs will be carried out in each of the major markets to get insights of the local consumer behaviors. Three FGDs each shall be carried out for each of the major markets. This shall also include three distinct age groups and the participants shall be from different psychographic segments. These insights will be validated in the consumer survey that will follow.

- Each of the FGDs will be moderated by experienced moderators preferably with adequate awareness of consumer's dairy preferences in these locations.
- The FGDs shall be videographed and shall be conducted with a Discussion Guide.
- Each FGD should have 15-18 participants.
- Each location will have 3 distinct FGDs with participants from 3 different consumer segments namely:
 - i. College Students (Age: 18-25)
 - ii. Women (Age: 25-45) Young Mothers
 - iii. Women (Age: 45-60) Elderly Mothers

2. Consumer Survey

The dip stick consumer study to gain insights of the consumer behaviors and purchase patterns as well as to validate the insights gained from the FGDs.

Surveys will be carried out in all the major markets with commensurate representation of all Income groups and other major demographic parameters like gender/education/Income etc

Sample Size:

- i. Sample size of 300 for Vishakhapatnam (min)
- ii. Sample size of 200 for other markets, if any (min)

The sampling methodology used for the Consumer Survey shall be stratified random sampling and should have adequate representation of various categories of consumers defined by age, sex, income and occupation.

Expertise Required

Position	Qualification & Experience
Dairy Sector Expert	Post Graduate with at least 15 years of experience in Dairy Sales and Marketing
Market Research Expert	Post Graduate with at least 15 years of experience in market research projects

Project Deliverables

The deliverables of this study shall be tied directly with the scope of the project and comprise of the following:

- i. An indicative market size report for all the listed dairy products in the organized sector for each of the major markets.
- ii. Competition Study Report of major competitor brands
 - Product Range
 - Go to market model for each product category
 - Marketing Strategy with specific emphasis on quick commerce segment
 - ATL activities undertaken by each brand
 - BTL activities undertaken by each brand
 - Pricing Strategy and Terms of Trade
- iii. Consumer Research Report with findings

Duration of the Study

The study is expected to be completed by 31st March, 2026.

Reports

Inception Report

Inception report will describe the proposed approach and methodology for conducting the study, sources for secondary data collection, guidelines and timelines for focus group discussion, procedures for data collection.

Number of copies: 5 hard copies and electronic version. The Inception Report is due within 15 days of signing of the Contract.

Interim Report

The Interim Report outlining the progress achieved.

Number of copies: 5 hard copies and electronic version (MS Office Word). The Interim Report is due within 45 days of signing of the Contract.

Draft Reports

Draft of final report with all the project deliverables.

Number of copies: 5 hard copies and electronic version (MS Office Word). The Draft Report is due within 90 days of signing of the Contract.

Final Report

Final report with all the project deliverables.

Number of copies: 5 hard copies and electronic version (MS Office Word). The Draft Report is due within 90 days of signing of the Contract.