Global Branding Prospects and Problems - A Case of Bottled Water Industry in India

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Abstract

The study is basically aimed at examining the state of branding in Indian bottled water, focusing on the performance of major Indian enterprises in creating brands in this segment; sustaining them in the huge domestic market and expansion measure for taking them into global markets. The Indian Bottled brands do not compete globally; the present study is aimed at finding reasons for Indian Bottled Industry's failure to stand by Global players and suggesting remedial measures to make effective strategy. Various facts revealed the lack of quality in the companies that are heading the industry in the danger control mode. Various suggestions are discussed to plug the loop holes to survive; the industry and in the industry.

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Key Words: *India, Bottled Water, Global Brand, Branding, Beverage industry*

Introduction

We are living in a time of unprecedented globalization. Hundreds of packaged goods producers, computer hardware and software manufacturers, mobile-phone service providers, auto makers and others now compete for consumers around the globe; bottled water is one such global package. But all of them are not successful. The most powerful corporations in the world - Sony, Disney, Coca-Cola, for example – have 'the strength of their brands' in common. As such, these and other successful organizations tend to manage their brands as key business assets that are a crucial underpinning to the overall corporate strategy.

Strong global brands are the key to winning international consumers, but creating effective brands across the complex barriers of nationality, geography, language and culture often proves a daunting task. Companies often flounder in their attempts to craft global brands for a myriad of reasons. But experience has convinced us that many firms struggling with global branding do so because of the same fundamental flaw: they attempt to analyze their brand from a global perspective without first analyzing their consumers from a global perspective.

Indian bottled water industry is such an example. Today marketers recognize that goods have magical powers that have nothing to do with 'needs', and they have become magicians who transform mundane and abundant things into exotic valuables. Water is such an abundant substance – which falls *from the sky for free* – critics of marketing have no trouble finding absurdities and contradictions when water becomes a valuable consumer good. Transformed from a public good into a branded commodity, water easily enters the international circuit of trade in beverages. Each year, about a quarter of the 89 billion litres of water bottled worldwide are traded internationally, often over thousands of kilometres (World Health Organization, 2003). A large part of this trade is reciprocal – meaning that, for example, the USA exports bottled water to Sweden, and it also imports bottled water from Sweden. Furthermore, rich countries like the USA import substantial amounts of water from poorer places like Mexico and India, countries hardly known for their high standards of water purity. Some countries have even specialized in water export; for example the Pacific island nation of Fiji, which has capitalized on its image as a 'virgin ecosystem' far from polluting civilization, now sells over US$90 million worth of water a year.

Studying the development of Indian brands becomes particularly relevant because more and more Indian firms increasingly concentrate on branding and image management to fuel their expansion (Schmitt and Pan, 1994). Brand is as much of a business asset as employees, equipment or capital - and should be nurtured with the same diligence.

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Global Brand- Explained

A global brand is one that expresses the same values in all of its markets and owns a similar position vis-a-vis its competitors around the world and creates several critical advantages, including: improved efficiency in costs for new product development and R&D because their outputs create revenues globally and not just locally or regionally; increased leverage with channel partners, especially in the packaged goods sector, which faces the constant parallel challenge of a consolidating and globalizing retail industry; economies of scale in marketing communication because copy can be produced along identical guidelines, and even shared, across markets; and improved alignment across the organization, boosting speed to market, and the sharing of best practices.

There are many ways to ensure success with branding. Choosing the right name, using the right advertising, applying the best strategy, and using the most relevant application techniques are some ingredients needed to make a branding effort successful. As stated earlier, this is not an easy function. Brand owners and marketers must deal with the changing environment and other factors that affect their ability to be effective.

Global Branding is not the answer to all the problems facing businesses today. There are substantial negatives to branding that must be considered i.e. if brands are mismanaged, the results can be damaging. However, if branding is carried out correctly, the advantages outweigh the problems (Lorenzini and McCarthy, 1992). A good brand will give the customer value for the dollar and give employees the satisfaction and confidence in their products (O'Malley, 1991). Strong branding can also accelerate market awareness and acceptance (Berry et al., 1988) of new products entering the market.

Conceptual foundations

Within the field of international branding, there is a growing body of literature that illuminates what it takes to be a successful local brand (Eckhardt, 2005; Ger, 1999; Kapferer, 2002). This literature emphasizes that local brands should capitalize on their local cultural capital to create unique value (Ger, 1999). At the same time, researchers have shown how global brands can charge price premiums (Johansson and Ronkainen, 2005; Steenkamp et al., 2003) because of the glamour (Alden et al., 1999) and quality associations (Holt et al., 2004) they convey.

Emerging markets offer tremendous growth opportunities for firms from developed countries. These markets are also a key factor in the future growth of the world economy. From 1800 through 1925 is known as the richest period of branding traditionally known as name giving (Hambleton, 1987). From these beginnings, branding has evolved as a major component of marketing strategy. Branding applications continue to grow and diversify. In spite of change, its importance to the business community and the consumer has not diminished. A brand usually comes in the form of a name, term, sign, symbol or design, or a combination of them and is intended to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors (Keller, 2003). Thus, branding is the process of creating a brand image that engages the hearts and minds of customers and is what separates similar products from each other (Duncan, 2005). Thus, there is no denying to the fact that the primary objective of branding is to create differentiation and preference for a product or service in the mind of the customer.

Recent studies in marketing converge that competitive edge in any market requires a strong brand. According to Berry et al. (1988) well-chosen name can give a company a marketing edge over comparable competitors. The authors concede that a name may be a key factor in success or failure of a business house. Researchers like Vrontis and Papasolomou (2007) also highlight in their research that by having a strong brand a company can enjoy cost-effective marketing campaigns, greater trade leverage, higher margins, ease of extending lines, standing out from the competition and defence against price competition.

A successful brand has the potential to generate consumer loyalty since it provides a level of quality, and trust. As defined, by De Chernatony and McDonald (1998), "a successful brand is an identifiable product, service, person or place, augmented in such a way that the buyer or user perceives relevant unique added

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values which match their needs most closely". For small, big or medium business organizations branding can not only be an effective and powerful tool but also ensure substantial payoffs (Rooney, 1995).

It makes sense to understand that branding is not about getting your target market to choose you over the competition, but it is about getting your prospects to see you as the *only one* that provides a solution to their problem. The brand also incorporates a set of product or service features that are associated with that particular brand name (Baker, 1996) and identifies the product/service in the market (Cooke, 1996). Brands often serve as the prototypes and category cues, and they help increase inter-category separation (Kumar, 2005). The validity of a brand as a category cue increases with a rise in the frequency of association between the brand name and the category (Tversky, 1977). Therefore, all else being equal, contiguous categories tend to be more differentiated if they have unique brands than if they share common brands. In other words, Branding has become a cultural symbol that is also related to a consumer's self-identity. There are others who argue that branding is basically a "product or service which a customer perceives to have distinctive benefits beyond price and functional performance or a symbol serving to distinguish the products and services of one country from another (Knox, 2000 and Kapferer, 1997).

Branding strategy as a source of competitive advantage in domestic markets is well recognized by many researchers like Calderon et al., (1997); Chaudhuri and Holbrook, (2001); De Chernatony, (2001); and Farquar, 1994: Moore et al., 2000). In line with the branding concept for domestic markets, the development of brands on an international basis offers opportunities for capitalising on economies of scale, developing global markets and pursuing multiple market segments (Barwise and Robertson, 1992; De Chernatony et al., 1995). Pioneering global brands such as Coca-Cola and McDonald's, multinational companies also view branding as a more consequential strategic activity that can have an enormous impact on their bottom line (Holt, 2006)

The marketing literature has amply discussed branding issues at the individual level (Fournier, 1998) but brands have rarely been analyzed in regional or global contexts (Askegaard, 2006). Brands provide symbolic resources for consumers to forge their identity, but brands can also change cultures (Ritzer, 1993). Finally, this study helps us analyze branding issues; Global Branding Prospects and Problems of Bottled water industry in India.

Objectives of the Study

The basic objectives of the study are

- Understanding Global Branding and its importance;
- To study the present position of bottled water industry in India;
- To find various reasons for success/failure of Indian Brands of Bottled water; and to make remedial suggestions.

Bottled Water

Consistent quality and taste are two of the principal differences between bottled water and tap water. Natural mineral water, spring water and purified water are three major types of bottled water. *Natural mineral water* is wholesome underground still or aerated water protected against pollution hazards and characterized by a constant level of minerals and trace elements. We can neither treat nor add any exogenous elements, such as flavours or additives. *Spring water* is also underground water protected against pollution hazards. This water also cannot be treated but it doesn't need to have a constant mineral composition. In some countries like United States, spring water is derived from an underground formation from which water flows naturally to the surface of the earth. *Purified water* is surface or underground water that has been treated to make suitable for human consumption. Unlike tap water this is distributed and packed in bottles.

Regulations for the bottled water industry

In the United States, FDA regulates bottled water as a food product. The quality of public water supplies is regulated by a separate authority. In compliance with the FDA's standard of equality regulation established in 1974, bottled water manufacturers are also required to ensure that their products adhere to the allowable levels for substances in bottled water (coliform and lead). This regulation includes levels related to microbiological quality (the number of coliform organism), physical quality (turbidity, colour and odour) chemical quality (Limits on organic and inorganic chemicals) and radiological quality (limit on radium 226). A bottled water product bearing a particular statement of identity, for example mineral water, must meet the particular requirements of the standard of identity of mineral water to avoid being misbranded.

The International Bottled Water Association (IBWA) is the trade association representing the industry. Founded in 1958, it was initially called the American Bottled Water Association. The present name was derived in 1982. The IBWA's primary aim is to assure that safe, clean, good bottled water is produced and marketed to consumers. To achieve this, it works closely with its member companies. It has got its six international chapters, which play a major role implementing the policies and measures. The Asia chapter, of which India is a member, is one of the largest and the fastest growing ones.

In compliance with IBWA regulations, bottlers must submit water samples, to either in-house or outside testing labs, to be analysed for physical, chemical and radiological parameters on an annual basis. Bottlers need to test their water annually for some pesticides and other synthetic or volatile organic compounds (SOCs and VOCs). Bottlers must also test for the presence of bacteria at least weekly for each of their water products for all of the available packaging sizes. Many bottlers have in-house quality control laboratories that conduct a number of on-site tests that include an examination of daily bacteriological analysis, basic physical or chemical parameters, total dissolved solids, pH, turbidity, colour and conductivity that may impact the taste of the water.

Bottled Water: Global Market Scenario

The bottled water business is a $35 billion worldwide industry. Image and branding have been such powerful components of the bottled-water industry and many companies compete with each other in the Global bottled industry market (Herbert, 2006; Edelhauser, 2007). Bottled water is the fastest-growing beverage category in the world: it “has expanded from a tap water substitute into the beverage arena” (Lenzner, 1997).World market for branded bottled water is dominated by two companies namely Groupe Danone, based in Paris, and Nestle, S.A., based in Vaud, Switzerland (Karolefski, 2002). The former markets Evian, Volvic, and others, including Dannon spring water. Nestle markets such majors as Perrier, Vittel, San Pellegrino, Poland Spring and Deer Park. Bottled water is the most dynamic market of all the food and beverage industry.

The marketing of bottled water in many developed countries subtle compared with the marketing of, say, soft drinks or beer. Bottled water is also the fastest-selling product on Australian supermarket shelves, with spending on branded water rivaling that on soft drinks last year and according to Australasian Bottled Water Institute bottled water sales during increased by 11 per cent last year, with Australians drinking more than 520 million litres of bottled water (Florez, 2001). Similarly consumption levels in the UK have also increased massively in five years: from 24 litres per person in 2000 to more than 35 liters per head in 2005 (British Bottled Water). In Italy also bottled water consumption has grown from 167 litres per head in 2000 to an estimated 181 litres in 2005. US citizens drank an average 63 litres per head in 2000 compared with an estimated 94 litres in 2005. Consumer demand for bottled water has increased enormously over the last one decade. Market experts and public-opinion polls attribute increase in demand primarily to several factors. Bottled water is preferred by many consumers because it is perceived to be safer and of higher quality than tap water, and many view it as a healthful alternative beverage to soft drinks or alcohol. Since purity is a major selling point for most bottled waters in international marketing arena and that is why top selling premium bottled water brands are mainly from US, Europe and Fiji (Beck, 2007). That is why today, nobody asks why they were buying water for ten times the municipality’s price. Call it a great advertising success, but this non-essential industry is growing exponentially. In 2006, Americans paid over $11 billion to buy 31 billion litres of bottled water, and they are thirsting for more.

But the bubble is bursting. San Francisco’s mayor banned the use of bottled water in government buildings, incriminating billions of disposed plastic bottles that filled landfills. In the US, a staggering 60 million plastic bottles are thrown away each day, a miniscule proportion of them are recycled. As per a recent debate amid growing environmental concerns about bottled water there are questions about safety of tap water. The US Conference of Mayors in June 2008 passed a resolution calling for a phasing out of bottled water by municipalities and promotion of the importance of public water supplies. Thus, it has highlighted a growing movement opposing regular use of bottled water because of its plastic waste and energy costs to transport drinking supplies.[1]

Bottled Water: Brand Positioning in India

In India, bottled water is still not perceived as a product for masses though; the scene is changing slowly thanks to low pricing and aggressive marketing strategy adopted by new entrants. Some surveys show that truck drivers on highways form a major chunk of bottled water drinkers. Penetration in rural areas is another significant factor that is likely to play a key role in the development of the bottled water trade.

As the bottled water industry is one of the most thriving sectors in India. The market is growing at a whopping rate of about 55 per cent annually and is expected to cross Rs. 1000-crore mark within the next couple of years. India is said to be the 10th largest bottled water consumer in the world. The demand has increased from two million cases in 1990 to an estimated 68 million cases by 2006.

Almost all major national and international brands have taken a plunge. Parley's Bisleri that virtually monopolised the bottled water market is now vying with Nestle, Coca Cola, PepsiCo, Manikchand, UB and Britannia. According to a national-level study, there are close to *200 bottled water brands in India*. Nearly 80 per cent of these are local brands.

Branding Activities of Bottled Water Companies in India

COMPANY	LABEL/ BRAND	BRAND POSITIONING	BRAND PERSONALITY	PROMOTION
Mount Everest Mineral Water (MEMW), a Tata enterprise	Himalayan	a unique taste; international quality	international	clientele includes luxury hotel chains and fine dining restaurants
Manikchand (Dhariwal Industries)	Oxyrich	Mineral Water	International – Exported mainly to South Africa & West Asia	USP as a 300 per cent oxygenated mineral water
Pepsico	Acquafina	Purified Water	National	Out of 9 different levels only two are launched in Indian Market
Pepsico	Ethos Water	Natural Spring Water	International	Not easily available in Indian Market
Bisleri	Mineral Water	contains minerals	International	contains essential minerals for healthy living
Bisleri	Mountain Water	emanates from a natural spring filled with the energy and vibrancy	International	Lauded as today's 'fountain of youth'
Prime Nutrients Pvt. Ltd	Prism	A Healthy Drinking Water	Northern India	The Real Health packaged Drinking Water

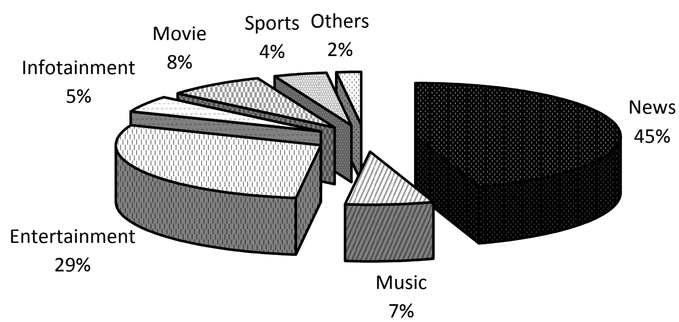
In comparison to global standards India's bottled water segment is largely unregulated. Safe water is rated with a different yardstick in different countries. In India, the aspect has been overlooked for long.

Some Facts about Bottled Water in India

[1] "Bottled water debate continues" The Fiji Times Online, Wednesday, July 02, 2008

As the bottled water industry is one of the most thriving sectors in India. The market is growing at a whopping rate of about 55 per cent annually and is expected to cross Rs. 1000-crore mark within the next couple of years. India is said to be the 10th largest bottled water consumer in the world. The demand has increased from two million cases in 1990 to an estimated 68 million cases by 2006. Aggressive marketing campaigns by bottled water industry regarding purity and safety is another important factor contributing to its increased demand. Bottled water industry advertising materials and "fact sheets" routinely state that bottled water is pure or entirely free of contaminants. The Advertisement of mineral water is showing significant increase. As per AdEx the mineral water advertisers prefer News Channel Ad space for advertising.[2]

Mineral Water Advertiser's Preference of Ad Space on various TV Channels



Source: AdEx India,A Division of TAM Research 18th Oct 2005 Newsletter

As a coin has two sides, the Indian bottled water industry has two sides. On the positive side are those names Like; 'Himalyan' from Tata group, Manikchand group's 'Oxyrich' etc which are successful globally while on the other side are some which has not even been successful in local market. The Pune-based Dhariwal Industries is one such successful story. It has taken its '*Manikchand Oxyrich'* mineral water to South Africa and West Asia since 2003. The Rs 800-crore diversified company primarily known for its *ghutkas* has set up joint ventures or franchisee operations in these countries with plans of setting up manufacturing facilities at a later stage. Manikchand's Oxyrich brand has created its USP as a 300 per cent oxygenated mineral water and commands a premium pricing (Rs 15 for 1 litre) in the market. The company has applied for patents in almost 20 countries and is now waiting to take its brand to other countries beginning with West Asia.[3]

On the reverse side are the companies who are no successful even locally reason being contaminated bottled water. As per a study conducted by the Centre for Science and Environment says that most of the brands of packaged/mineral water available in the country contain pesticides -- several of them banned -- significantly higher than permissible limits, which can cause serious physical impairment ranging from damage to the central nervous system to lung cancer; the study further says that while packaged water brands in Delhi have 36.4 times higher total pesticide content than the permissible limits, Mumbai brands have 7.2 times the standard content.

In 2003, The Indian government Wednesday withdrew the licenses of eight bottled water units following reports there were massive doses of pesticides and other chemical contaminants in their products. It was found that some of the bottled water available in the market contained pesticides up to 104 times the

[2] http://www.tamindia.com/tamindia/NL_Adex/TV/Mineral%20Water%20TV.pdf

[3] "Manikchand's Oxyrich mineral water to enter S. Africa, W. Asia" Business Line, Business Daily from THE HINDU group of publications Wednesday, Nov 28, 2007

international limit. Compared to that, imported brands such as the prohibitively expensive Evian contained no pesticides.[4]

Evian, which is imported from France and not bottled in India, is the only brand in which no traces of pesticides were found. The European Economic Commission directs that the maximum residue limit for total pesticides is 0.0005 mg per litre and 0.0001 mg per litre for a single pesticide. The pesticides which were tested for include organochlorines, organophosphorous, chlorpyrifos, malathion and DDT.

The bottled water industry is India is estimated at about Rs 1,000 crore (Rs 10 billion) and is growing at a rate of 40 per cent. The CSE list contains the country's leading packaged/mineral water brands. Ramesh Chauhan's Bisleri, the market leader, ranks 15th amongst 17 water brands studied in Delhi with the total pesticide content being 79 times more than the prescribed limits and seventh amongst 13 brands studied in Mumbai.

Coca-Cola's Kinley has been ranked 8th in Delhi with 14.6 times more than the prescribed limits of pesticides, while it is on the 5th spot in the Mumbai list. Other brands that find a mention in the Delhi list include No.1 McDowell and Kingfisher from the UB stables Pepsi's Aquafina, Nestle India's Pure Life and DS Foods' mineral water Catch amongst others.

The study says that the pesticide content varied in bottled water brands because of the source of raw water. In Delhi, most of the companies depend on borewell water and are located in industrial or agricultural areas which is the reason behind an increased pesticide content. In Mumbai, however, the companies use water supplied by the municipal corporation. The water companies clean 20-80 per cent of the pesticides in the source water.

Reasons for Failure of Indian Bottled Water’s Global Brand

Globalisation strategy involves a wide spectrum of commitment and control, and requires the firm to strike a fine balance between benefits and risk as well as long term and short-term objectives. Indian Bottled Water Brands do need to own a sizeable number of global brands for her continuous economic growth and prosperity. Facing problems in the domestic market of intense competition and overcapacity, more and more Indian companies share the same understanding that they have to “go global” for future growth and profitability, and must succeed globally in order to win the domestic market.

In our experience, almost all companies that own ‘global brand’ are actually struggling to achieve the theoretical economies of scope and scale. There is a serious shortage of branding experts in India. Those with experience in international marketing are even harder to find. Thus most of them are mired in the same basic melodrama: ‘central marketing’ (or whatever that function is called) tries to establish a set of guidelines for the brand. Often this is as simple as a ‘brand book’ that lays out the rules of ad copy and iconography (packaging shades, size, etc.). This brand book is then distributed to the ‘country organizations’ (they may be divided by country or region) which almost invariably choose what they want to use from the brand book and ignore the rest. When the central organization pushes for greater adherence, the country managers respond with a classic refrain: ‘But our market is different!’. What results is wasted energy.

The central organization insists that global consistency in brand execution will help the company achieve greater consumer awareness and economies of scale (which, as it happens, is true), while the individual country organizations counter that their local markets are unique and require customized brand executions (which is also true). While the debate careens back and forth, the brand itself is lost in the shuffle and its sought-after ‘globalness’ never materializes.

Discussion and Remedial Suggestions

Global branding must be driven by collaboration among local markets, both with each other and with central marketing. Companies should tear down the segmentation tower of Babel and lay the foundation for an effective global brand. To do so, however, most companies will need: a different process for

[4] http://www.corpwatch.org/article.php?id=5588

coordinating brand development; a revised consumer research methodology; and a clearer definition of the roles of and relationship between the center and the regions.

Bottled water became a product in the West during the 1920's and developed rapidly. In the water and economically-rich world, bottled water started as a luxury—a non-essential item of desire, health and status. Today, globally almost every country is accepting the "bottled water culture." Millions of people get parts or all of their daily water values from bottled water. A study done by Green Nature suggests that over half of Americans drink bottled water, spending 240-10,000 times more than tap water.

The water came from fancy mountain streams: they were packaged and sold as mineral-filled sparkling water. It was different from tap water and a healthy alternative to sweet and street smart colas. But soon, the industry grew. In most cases, the companies sold water that was not sourced from mountain springs but from public water: municipal water sources. Once the snob habit was formed and the market created, the companies simply packaged tap water in most cases into plastic bottles and sold it from supermarkets.

Today, nobody asked why they were buying water for ten times the municipality’s price. Call it a great advertising success, but this non-essential industry is growing exponentially. In 2006, Americans paid over $11 billion to buy 31 billion litres of bottled water, and they are thirsting for more.

But the bubble is bursting. San Francisco’s mayor banned the use of bottled water in government buildings, incriminating billions of disposed plastic bottles that filled landfills. In the US, a staggering 60 million plastic bottles are thrown away each day, a miniscule proportion of them are recycled. Greenhouse gas emission from trucks which transported the bottles across the state—and often across countries—was also a reason for the ban. But equally importantly, the mayor stressed that his city’s municipal water came from pristine sources inside a national park. This was as good, if not better, than the bottled water sold by companies.

Salt Lake City’s mayor asked public employees to stop supplying bottled water at official events. New York has launched a US $1 million campaign to encourage people to drink its famously clean public water. Another slap has come from top-notch restaurants, which—in reverse snobbery—are refusing to serve bottled water. The worst is coming. Junk food giant Pepsi was forced to admit in the US that Aquafina, its bottled water, is nothing more than tap water. It has agreed to label its bottles to say what it doesn’t want to: that Aquafina is tap water from a public water source.

The bottled water industry is in damage control mode. But I believe that this scream could easily become a shout as people realise the environmental cost of this product and realise the sheer stupidity of paying dearly for something that is cheaper and readily available.

The fact is that bottled water is no different from water that should come from our taps. The only difference is it is packed in plastic and not conveyed in pipelines. But, while the Indian rich can afford to buy bottled water, the poor cannot. The rich have the choice and they opt out of the failing municipal systems. What is forgotten is that Indian water systems are failing because the rich in the country—who can afford bottled water—are still supplied water at a tenth of what it costs the municipality. Worse, our wastewater is conveyed and pumped from our homes and even treated. None of this cost is recovered. In other words, it is our subsidy which is leading to poorer and poorer delivery from water agencies. It is the rich, who have options to drink bottled, who are failing the system. Moreover there is much of environment cost; the mountains of plastic waste, the disposal of which isn’t paid for. Water in bottles costs the earth everywhere.

The botted water industry is global in nature. But it is designed to sell the same product to two completely different markets: one water rich and the other water scarce. The question is whether this industry will have different outcomes in these two worlds. Or will we, for two opposite reasons, agree that their business costs us the earth and that it is not good for us?

To be Global the companies must concentrate on the quality standards, and the cost.

Conclusion

Brands are built through the customer's entire experience, not just marketing or advertising alone, and if managed appropriately can be a source of true competitive advantage. Indian Bottled water companies have a long road to travel in the internationalisation process, given the complexity, cost, uncertainty and fierce competition in creating and sustaining their brand names in developed markets. Compared with their Western counterparts, Indian companies have competitive advantages in low-cost production, sourcing, distribution and service. India's vast domestic market brings economies of scale and domestic rivalry. Many markets in small towns and rural areas remain untapped or under-developed. Indian companies are disadvantaged in terms of their lack of core technology, design and innovation, branding and knowledge of managing large complex businesses. Many still have not truly grasped the art of marketing and brand building in the Western sense of the word. They are aware of the necessity, but not of how to do it.

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