

The Condom Kingdom

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With a billion plus population and appalling illiteracy levels in India, can there be any better device than condoms for the government to enforce the small family norm? In fact, it helps to kill two birds with one stone, that is, both family planning and the controlling of sexually transmitted diseases. Demographic explosion poses a major challenge to India's rapid economic development. The realization on the fallouts of rampant growth in population prompted the government to initiate a simple, non-clinical family planning programme. On the other hand-equally important-condom manufacturers are beginning to appreciate that in a frankly competitive market, future sales depend on new, more candid, consumer- centered approach. Paradoxically, India, a country which is craving for women's liberalization, needs to pay new attention to the role of the father as the responsible parent.

MAJOR MANUFACTURERS

As a part of the effort towards family planning, Hindustan Latex was established as far back as 1966 for the manufacture of condoms. The initial capacity of 144 mn pieces a year was progressively increased by setting up of manufacturing facilities in different parts of the country. From the production of condoms, the company emerged as the only integrated manufacturer of family planning devices ranging from male condoms (branded as Nirodh) to female contraceptives (Saheli), female oral contraceptives (Mala D/N), and IUCD (Copper T) in India.

The company has entered into a technological tie up with a UK based company to manufacture female condoms in India. Presently, the company is test marketing the imported products to assess their economic viability. The government owned Hindustan Latex has, however, been put on the privatization block.

The production of Nirodh condoms is around 650 mn pcs a year. The use of condoms, conceived primarily as a tool for family planning to curtail population growth, has attained primacy in arresting the spreading of the dreaded disease, AIDS. Indians use some 1400 mn condoms annually while the domestic production is of the order of 2000 mn pieces.

Hindustan Latex, the pioneering government enterprise, had initiated moves to set up a packing unit and distribution centre at Dubai in view of demand from the markets in Middle East, Iran, Iraq and other African countries. It was collaborating with Middle East Development and General Trading Company, Dubai for the purpose. The company was also setting up 25 electronic vending machines in Delhi.

TTK-LIG is a 50:50 joint venture between T.T.Krishnamachari & Co. and Seton Seholl International of the UK (formerly Rubber Co) (renamed TTK Biomed Ltd). This leading condom manufacturing company of India and producer of the Kohinoor brand of condoms has not only been supplying the product to the domestic market but has also made an export thrust. Because of the HIV scare, condoms are in great demand. The company exports more than 600 mn pieces annually. It exports to some 40 countries.

Apart from these two majors, JKs (JK Pharmachem) and Polar (Polar Latex) also set up manufacturing facilities for the production of condoms. It was reported that these companies, along with some activity in the grey market, claim about 10% of the market. Polar has emerged as the largest exporter of condoms to Russia.

The Jofemar group was reported to be negotiating with the Government of India to set up condom vending machines all over the country. The machines look similar to those which are at present being used to sell Coke and Pepsi. The machines have an in-built coin mechanism which assesses the value of each coin and returns the change. The vending machines should give a big push to product distribution if the product is priced reasonably.

DEMAND FOR CONDOMS (MALE CONTRACEPTIVES)

It can be seen from Table-1 that an increasing awareness about AIDS and need for family planning is expected to be the driving force behind condoms' demand in future. It offers distinct advantages as it is inexpensive, easy to use and dispose, and has no side effects. It can also be seen from Table-II that free distribution of contraceptives is significantly higher than social marketing due to government's earnest efforts to reach the poorest of the population. There is a tremendous need to devise strategies for condom promotion and social marketing in India considering the magnitude of the problem.

Table - 1

DEMAND: PAST AND FUTURE	
Year	Billion Number
1990-91	1.00

**Member of Faculty, IBS-Bangalore, 19/3, Srinivas Industrial Estate, Near Metro Kanakapura Main Road, Bangalore-560062. E-mail : anirvinna@gmail.com*

1991-92	1.08
1992-93	1.06
1993-94	1.25
1994-95	1.36
1995-96	1.66
1996-97	1.58
1997-98	1.63
1998-99	1.71
1999-00	1.77
2000-01	1.97
2001-02	2.10
2002-03	2.25
2003-04	2.40
2004-05	2.60
2005-06	2.80
2006-07	3.00
2007-08	3.25
2008-09	3.50
2009-10	3.75
2014-15	5.50

Source : Intecos-CIER

Table - II

Distribution of Condoms under Free Supply and Social Marketing Programme (1995-96 to 2000-01)		
(In Million Pieces)		
Fiscal Year	Free Supply	Social Marketing
1995-96	891.22	162.92
1996-97	741.70	263.25
1997-98	685.85	324.42
1998-99	674.70	348.74
1999-2000	624.36	477.74
2000-2001	627.42	465.43

Source: Ministry of Health and Family Welfare & Combating HIV/AIDS in India 2000-2001, National AIDS Control Organization, Govt. of India.

MARKET GROWTH RATES

The domestic market, currently growing at 7-8% per annum, is estimated to increase to 3.75 bn pieces in 2009-10 and 5.5 bn pieces in 2014-15. If, as projected, nearly half of the global population were concerned about HIV, AIDS and STIs (sexually transmitted infections); India could become the largest manufacturer, supplier and exporter in the one billion dollar condom market.

SHARE OF LEAD PLAYER

Table-III shows that there is stiff competition among Indian manufacturers as they have to compete not only among themselves but with a wide range of imported brands. Half of the market share is being shared by T.T.K and

Hindustan Latex. With exports of over 1.5 billion condoms in the last 4 years to over 40 countries, including the UK, USA, France, Germany, Australia, Spain, Mexico, South Africa and Brazil, TTK-LIG Limited, the largest manufacturer of condoms in the Asia Pacific region, is today considered a reliable sourcing point for world class condoms in the international market. International Healthcare Agencies like Crown Agents, UNFPA, IPPF and the European Commission are some of TTK-LIG's valued customers. Established in 1963, TTK-LIG Limited, a joint venture between the TTK Group and SSL International Plc, who are world leaders in thin film barrier technology, has always pursued quality as a religion.

What started off as a small plant manufacturing 37.5 million condoms annually, is today a multi-location, multi-plant setup producing 1.7 billion condoms annually with Good Manufacturing Practices supported by Quality Management Systems certified by the British Standards Institution for BSEN ISO 9001: 2000, the 510K of US FDA, the German DLF, the French AFNOR, the Australian TGA, the South African SABS all well known, reputed international certifications.

The TTK-LIG plants also have the ISO 14001 certification for Environmental Management Systems and the ISO 13485: 2003 certification for medical devices one of the few companies in the world to have them. Condoms manufactured in these plants not only meet but even exceed the stringent international quality standards like WHO: 2003 and ISO 4074: 2002 by a fair margin. This excellence in quality has been the consequence of sustained commitment to quality and continuous improvements in technology, processes and systems over the years.

The large capacity at TTK-LIG enables it to respond to consumer requirements quickly and deliver quality products on schedule at affordable prices. This consistency in quality has also been testified by independent, reputed testing laboratories around the world. The TPM journey that started in 2000 is now helping TTK-LIG become cost effective too by aiming for zero losses, zero breakdowns and zero accidents. Thanks to their obsession with quality, their flagship brand, Kohinoor, available in 8 varieties Pink, Xtra Dots, Xtra Ribs, Xtra Thin, Xtra Time, Triple Xtra, and Xtra Time with Dots - enjoys a leadership position in the Indian market with a market share of over 45%. Durex (the world's No.1 brand), launched in 1997 for the Indian elite and available in 6 varieties Superthin, Comfort, Performa, Sensation, Flavours and Pleasuremax - is the other brand marketed by them in India. TTK-LIG, incidentally, also pioneered advertising of condoms in India.

Besides being a leading supplier of condoms to the Govt. of India's Family Welfare Programme, TTK-LIG is a trendsetter and also plays a very important role in shaping national policies regarding condoms. A representative of India in the ISO technical group, TTK-LIG also plays an important role in the development of global standards for condoms.

The public sector 'mini-ratna,' HLL's business is under pressure with fall in margins during the last two years due to fluctuations in prices of natural rubber (NR). However, HLL refuses to increase its price of 'Moods', its flagship commercial brand which is still sold for Rs10 for a pack of 3 and Rs 30 for a pack of 10. The Company says it is continuously innovating its manufacturing practices. This is because the condom specifications in terms of burst volume and burst pressure requirement are becoming stringent year after year. The company has risen to the level of international standards/ specifications of condoms after being criticized as inferior in quality by central government agencies themselves. Now Moods brand enjoys an impressive market share in the country capturing over 50 % of Kerala's, 25% of Tamil Nadu's, 22 % of Rajasthan's, 39% in Uttaranchal's, 34 % of Orissa's, 28 % of Andhra Pradesh's and 20 % of West Bengal's markets. HLL also exports its condoms to 70 countries. It is a major consumer of rubber in the country exceeding 1,000 tonnes annually. Naturally, rubber price hike deeply hurts the bottom lines of condom manufacturers throughout the world. Chinese latex industry, one of the major producers of condoms, also suffered a similar fate in 2006-07 when NR prices were hiked. The industry had to further strengthen the management, adjust its product structure, improve quality and lower the cost. Total profits declined, some manufacturers suffered losses and even had to suspend production. In China, a low investment in R&D and a large number of units producing condoms led to hostile competition and excess capacity. The problem was not so acute in India.

HLL compensates for its losses in condoms from its other business. It plans to increase its turnover to Rs 1000 crore in 2010 from Rs 243 crore last year through aggressive product diversification. In fact, it now calls itself a healthcare company and not a condom company with a range of products from blood bags, intra-uterine devices, steroidal pills, auto-disable syringes, hydrocephalus shunt and female condoms.

The manufacturers have continued to sustain interest in a rather unfriendly NR market because of the upward demand curve in the industry for condoms. Similar situation prevails in the most populous country-China.

There is yet another vital factor why the 40-year old HLL still makes condoms unfazed by competition. John Kay (quoted in The Undercover Economist) showed that certain embarrassing products including condoms are highly profitable because new entrants find it hard to create buzz about their products. According to industry estimates, the overall size of the condom market in India is roughly around two billion pieces annually with female condom's share almost negligible. In fact, it is not big outside India either. The reason is due to its high price and lack of publicity. HLL, which manufactures the popular 'Moods condom', has just launched Velvet female condoms in 2008. It is a more cost effective product than its predecessor, Confidom, which is for the premium segment, priced at Rs 100 for a pack of three, whereas the latter is priced at Rs 250 for a pack of two pieces. The huge price difference can be attributed to material used in their production. Velvet is made from material called Nitrile which is stronger and much thinner than latex which is commonly used for condoms. While HLL is optimistic about the potential growth of this particular segment, its rival firm, TTK-LIG Ltd, which markets the international brand, Durex condoms, in India, is keenly watching Velvet's performance before it takes any decision. HLL has a sales target of about Rs 5 crores by March 2009, of which about 8-10 percent is expected to be contributed by the female condom segment.

J.K Ansell Ltd (JKAL) is 50:50 joint venture between the Raymond Group and Ansell International for manufacturing and selling the popular 'Kama Sutra' brand. It also provides condoms to the Government of India and Non- Government Organizations. Its launch was probably the most significant consumer product launch in India in 1991. The brand deliberately kept away from the conservative approach in which condoms were shown as being for married couples only. It used a bold and sensual advertising campaign to position itself as a pleasure enhancer that is exported to over 70 countries around the world. In fact, its total exports for the year ending March 2007 stood at Rs 81 million which include countries like Chile, Peru, West Indies, Ivory Coast, Mozambique, Ethiopia, Kenya, Nigeria, Sudan, Botswana, Zambia, Nepal, Bangladesh, Cambodia, Phillipines, Poland, Turkey, Azerbaijan, Russia, Ukraine, Romania, Sri Lanka, UAE & Saudi Arabia. The company also exported bulk products to Ansell International for the markets of USA and South Africa.

Polar Pharma India Ltd. is one of the major condom manufacturers in India. Apart from its branded item, the company is also producing bulk quantities to meet Government orders. It is expanding its production capacity and has also re-launched its Adam brand of condoms in the premium sector after having lost a large share of the market because of a variety of reasons. It has expanded its footprint to the US and Europe to address the institutional and retail segments. Till recently, the company had been largely dependent on tender exports. Now, however, the idea is to supplement institutional sales with aggressive sales pitch at the retail level as well. The marketing strategy in the US and Europe would veer around positioning products that are not available there. The pricing of the products of Adam and Moments in different markets would be a major determinant of market share. Packaging and the graphics on the cartons would be different keeping in tune with tastes of customers in different markets. A Turkish firm has been engaged for innovative designing and packaging for different markets. The company, which has its presence in 20 countries across south East Asia, West Asia, Latin America and Africa, will soon launch 'Dhoom' for the market. Korean condom makers account for a larger market share for condoms globally. To date, South Korea is the top producer of condoms, with its Hankook Latex and Dongkuk Trading accounting for a combined 30% of the world's overall market for condoms.

Suretex Prophylactics is another company that is predominantly an export oriented company. TTK Healthcare belongs to the TTK group.

Table - III

Lead Players	
Company	Share (%)
TTK-LIG - Biomed	33
Hindustan Latex	22
J.K Ansell	11
Polar Pharma	8
Suretex Prophylactics	6
TTK Healthcare	7

Source: Intecos-CIER

Table-IV
Market Share in Relation to Male Population

Market Share		Male Population in the age group 15-59 (In Millions)	15-19	20-29	30-39	40-49	50-59
Rural	45	208.7	37.75	59.50	50.57	37.44	23.39
Urban	55	94.7	16.19	28.37	22.83	17.30	10.05

Source: Census of India, 2001

Table-IV shows that the usage of condoms dominated by male population is significantly low in rural India in comparison with the urban. The reasons may be due to high cost, illiteracy, lack of awareness, knowledge and limited distribution and lack of advertising in rural India. Quite the contrary case is found in urban India, where though male population is low, the usage will be high for the obvious reasons. It is assumed that only the age group of 15-59 (as per 2001 census) use condoms.

SOCIAL MARKETING OF CONTRACEPTIVES

The government of India started this programme as early as 1968 for those consumers who cannot afford to buy them at a full market price or are beyond its reach through the free public distribution programme. The process involves supplying a subsidized product through existing commercial distribution networks, using the mass media and other retail marketing techniques to commercially advertise the products. India's social marketing programme is considered to be the largest in the world. Table-V clearly shows that there is a significant rise in sales of contraceptives under social marketing programme with the participation of firms, NGO's and others. But there is a strong negative correlation between the price and demand for social marketing of condoms. The rapid expansion of family planning programme, at a time when funds available are becoming scarce, has led to rise in the price level thereby adversely affecting the demand for this product.

Table - V
Sale of Condoms by Social Marketing Organisations in India
(1995-1996 to 2007-2008)

Market Company/NGO	(Quantity in Million Pieces)												
	1995-96	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08 (upto July 2007)
Hindustan Latex Ltd., Thiruvananthapuram	17.49	115.38	169.84	190.18	193.03	137.02	139.51	170.53	189.48	216.43	270.88	291.22	31.26
Population Services International, Delhi	59.87	48.16	56.11	57.98	93.46	82.77	91.85	97.62	107.29	114.40	134.20	138.12	48.25
Parivar Seva Sanstha, Delhi	4.03	2.99	20.05	34.03	30.05	37.64	36.95	50.73	46.71	51.37	46.80	57.02	10.43
F.P.A.I., Mumbai	-	2	-	1	3.48	-	0.58	0.00	0.00	-	-	-	-
Parivar Kalyan Kendra, Panchkula	-	-	3.49	11.68	37.98	44.45	37.1	52.72	69.96	-	-	-	-
D.K.T. India, Mumbai	3	9.95	128	29.71	57.24	61.23	50.02	49.78	51.47	54.89	69.02	81.83	33.50
World Pharma, Indore	-	17.1	31.7	144	27.77	14.7	14.17	10.00	80.32	72.00	24.38	25.93	2.70
Janani, Patna	-	-	7.29	9.76	29.25	62.03	40.99	46.92	19.86	23.28	61.71	34.47	15.86
Pashupati Phar. Chem. Ltd., Calcutta	-	-	3.99	-	4.88	5.1	14.94	2.00	10.00	14.65	11.52	12.89	2.12
Population Health Service (India)	-	-	-	-	-	-	-	-	23.11	55.96	94.76	42.69	16.86
Medicon	-	-	-	-	-	-	-	-	5.00	4.88	10.04	3.11	-
Parivar	-	-	-	-	-	-	-	-	4.98	4.03	-	-	-
State AIDS Control Society	-	-	-	-	-	20.49	10.42	21.34	16.60	3.60	32.58	37.58	-
Madhya Pradesh State Civil Supplies Corp., Bhopal	-	3.91	-	-	-	-	-	-	-	-	-	-	-
Dey's Medical Store (Mfd) Ltd., Calcutta	-	-	-	-	-	-	-	-	-	-	-	-	-
Eskag Pharma (Pvt.) Ltd., Calcutta	-	-	-	-	-	-	-	-	-	-	-	-	-
R.B.D.F.	53.12	63.76	19.15	-	-	-	-	-	4.98	-	-	-	-
Polar Latex Ltd.	4.984	-	-	-	-	-	-	-	-	-	-	-	-
JK Ltd.	4.966	-	-	-	-	-	-	-	-	-	-	-	-
TTK	8.76	-	-	-	-	-	-	-	-	-	-	-	-
LRC	0.9968	-	-	-	-	-	-	-	-	-	-	-	-
National Trading Co., Cochin	-	-	-	-	0.6	-	-	-	-	-	-	-	-
Brooke Bond	1.67	-	-	-	-	-	-	-	-	-	-	-	-
Others	-	-	-	-	-	-	2.25	23.68	-	-	-	-	-
Total	162.92	263.25	324.42	348.74	477.74	-	438.78	525.32	629.76	615.49	755.89	724.89	160.98

Source : Ministry of Health and Family Welfare, Govt. of India.

ACHIEVEMENTS IN CONTRACEPTION:

Table-VI shows that despite all the taboo that is associated with condoms, it is still being extensively preferred and used as a contraceptive device followed by oral pill, IUD insertions and sterilization. In a country like India, where tubectomy is more preferred to vasectomy or male sterilization as the man does not want to permanently relinquish his ability to father offspring, the condom remains the only effective male contraceptive available. The usage of condoms is only 5-6% in India which is very low when compared with developed countries' average of 22%. Japan has the highest rate of condom usage in the world, with condoms accounting for almost 80% of contraceptive use. In a few countries such as Somalia, condoms are illegal. The Roman Catholic Church generally opposes condoms use as an artificial birth controlling measure. The selection of contraceptive method depends upon social, economic, political, cultural, religious, demographic and geographic factors.

Despite the wide acceptance in modern times, the improper use of condoms contributes litter problems for the economy. Estimating condom usage is difficult. Manufacturers rarely release production figures. Condom distributors are reticent about their activities, and retail outlets in most countries are too varied and extensive to offer accurate information.

Table-VI
Achievements in Contraception in India (2001-2002 to 2007-2008)

(Figure in Million)							
Methods	Achievement*						
	2007-08 (April to oct. 2007*)	2006-07 (April to oct. 2006)*	2005- 06 (April to sept. 2005)	2004- 05 (April to sept. 2004)	2003-04 (April to December 2003)	2002-03 (April to December 2002)	2001-02 (Corresponding Period)
Sterilization	1720915	1627965	1.522	1.518	3.05	2.9	1.773
IUD Insertions	3203488	2949275	2.76	2.65	4.26	4.15	3.21
Condom User (Eq.)	17076351	18028862	18.16	15.53\$	16.33	15.42	11.68
(i) Free Distribution Scheme	-	-	9.49	9.04	9.44	8.56	6.89
(ii) Commercial Distribution Scheme	-	-	8.67	6.50	6.88	6.86	4.79
Oral Pill Users (Eq.)	8454406	7913773	7.24	7.18	8.24	7.64	6.79
(i) Free Distribution Scheme	-	-	4.51	4.19	4.25	3.87	3.69
(ii) Commercial Distribution Scheme	-	-	2.73	2.99	3.99	3.77	3.11
Total	30455160	30519875	29.68	26.88\$	31.87\$	30.12\$	23.46

Source: Ministry of Health and Family Welfare, Govt. of India .

CURRENT ISSUES

Condoms are considered to be a taboo product. In India, people generally do not want to discuss these products in public; let alone be seen buying it. Hence, marketing of this product is a tough call for any marketer. A public awareness campaign which used the slogan 'Condom Bindaas Bol' (Say Condoms Freely), was launched to

encourage use of condoms as a part of efforts to encourage safe sex, has won a United Nations award of excellence in campaigns that tackle priority issues. The key barrier in using male condoms in India is the embarrassment of buying it. The root cause of embarrassment lies in illegal sexual connotations attached to it. Adding insult to the injury is the misconception among men that condom usage reduces pleasure. Firms have introduced ribbed flavoured, pann-flavoured Aastha, long lasting, vibrating variants. Of course, the vibrating condoms created controversy in 2007. The pack of three condoms branded as 'Crescendo', containing a battery-operated ring like device, should therefore be banned. Sex toys and pornography are illegal in India. One of the reasons for sluggish growth in the condom market is the demand supply gap. Since there is a lot of money and demand in the "social marketing" initiatives of the government and UN sponsored agencies because of AIDS scare, the manufacturers are flush with orders. Hence, there is little time left to create the market. According to Foolonahill.com, the condom usage in India is only a mere 5%. The product is still perceived to be a pregnancy prevention tool. Indians have never looked at it as a tool for pleasure enhancement. Although the brands are now highlighting the pleasure aspect with the launch of Dotted and scented variants, the market is yet to catch up. Till recently, the biggest barrier in the use of a female condom was its cost. Commercially, a female condom is available for Rs 45 to 50. But now, with social marketing companies selling it for Rs 2 to 5, a lot of women are opting for it. In cities such as Delhi and Mumbai, female condoms are now doing brisk business due to surge in sex workers. There were misconceptions regarding female condoms earlier as it looks bigger than a male one, is smooth and stronger but it is equivalent in length with extra lubrication. There has been a need to set better and more practical standards about condoms. That is because there are about 80 manufacturers globally that collectively make and distribute about 12 billion condoms each year. In future, it is also expected that condom production would be far higher than the current levels.

The condom conference was able to focus further on how manufacturers would further boost and ensure the safety and quality of the products produced. Because the market is expected to grow in the near future, the standards tribunal wants to make sure that the condoms that are produced would be appropriate and would be effective in helping curtail and contain the spread of the deadly sexually transmitted diseases. The global standard convention for condom production also tackled issues regarding size. Though, it is not as important as safety or quality, condom size also needs further attention. That is because there are a rising number of complaints regarding condom sizes. There is a common size or standard size of condoms available in the markets. But there are complaints over condom sizes that do not fit many men. Experts said it can also be possible that breakage and tearing off would result from sizes that are too large. There is also a strong discomfort if the condom used is too tight.

The standard condom convention also discussed proposals to reduce the quality inspection time coverage for condoms to just about three to four years, from the current five to six years. Manufacturers admitted that doing so would greatly help in ensuring that the quality of the condoms sold meets the high standards set by Health Ministry, WHO etc.

CONCLUSION

It is crystal clear that a condom is the best available tool in the second most populous country India for controlling dreaded diseases like AIDS and to enforce family planning. In fact, our economy has the potential to grow at an impressive rate in the years to come. Since the usage of condoms is low in rural India, there is a huge need to distribute condoms under social marketing for the people who cannot afford to buy at the market price. Being a price sensitive product, any high price may drastically reduce the demand for this product under social marketing system. Free distribution should continue to be encouraged for the sake of the poorest of the poor. The competition is severe among the players to grab a sizeable share of the market. Majority of the manufacturers in the country do rely on government and UN sponsored agencies for the orders. 'Variety is the spice of life' is a maxim that applies to this industry as manufacturers began to introduce different flavors into the market to woo the customers. Quality has become of paramount importance for this particular product. Otherwise, it would defeat the very purpose for which it is meant for. It is interesting to note that despite all the bashfulness associated with the product, it overwhelms other alternative contraceptive methods in India. With the advent of female condoms, the manufacturers will also face new challenges in marketing of male contraceptives.

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(Cont. on page 27)

rural market. Developed and smaller states like Punjab, which have good infrastructure, can be a good place to start from.

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