



ISSN 1023-1072

Pak. J. Agri., Agril. Engg., Vet. Sci., 2016, 32 (2): 246-257

BRANDING AGRICULTURAL COMMODITY BASED INDUSTRY: THE CASE OF SPICE INDUSTRY IN PAKISTAN

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ABSTRACT

Spice industry in Pakistan is an agricultural commodity based, high demand, and growth-oriented sector. The sector has been split into packed cum branded and unpacked cum unbranded spices. The packed spices generally tend to be wholesome and processed in standardized fashion. On the other hand, the unpacked/open/loose spices generally tend to be unwholesome, sub-standardized, and adulterated that cause serious ailments and health hazards. This probe ascertains that how a conventional agricultural commodity-based industry can be turned into a branded industry? It examines industry profile, its branding moves, and the role of public and private sectors in branding and regulating such trade. This is a qualitative inquiry that rests on selected literature review and focus groups from consumers, field experts, and merchants for rich insights of the realm. The results indicate that the spice industry in Pakistan is a fast growing billion rupees industry. It is dominated by the unpacked/loose and unbranded spice sector that enjoys almost 58% market share and the branded spice sector has 42% share. There is a dearth of awareness about detrimental effects of adulterated or sub-standard spices, inflation and affordability by poor masses, and loopholes in the regulatory system cum criminal negligence by food inspection teams and relevant authorities. However, the branded spice sector is playing a positive role in supplying the hygienic and high quality packed spices plus recipe mixes to the market and consumers. Eventually, a proposal has been lodged for branding the spice industry and protecting it from culprit producers and looter merchants.

Keywords: branding commodity-based industry, spice industry Pakistan

INTRODUCTION

Spice industry in Pakistan is a high demand and growth oriented billion rupees industry. It is an agricultural commodity-based industry. The market size of the industry stands Rs. 40 billion per annum (Andrew, 2015). Over the period of time, the branded players emerged including National Foods, Shan Foods, Ahmed Foods, Mehran Foods, and some others. The branded sector offers high quality, standardized, and packaged products to the market, developed through homogenous recipes, stern quality control parameters, and international

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benchmarks. On the other hand, the unbranded spice sector offers inferior quality and adulterated spices to the market that endangers consumers as the consequences lead to severe ailments among users including stomach ache, gastroenteritis, diarrhea, rash, nausea, mental retardation, cancer, etc. (Brody, 1983; Meghani *et al.*, 2008). As the masses in Pakistan are poor people, so the grocery wholesalers and retailers exploit them by offering cheaper, unpacked, and unbranded spices, which are around thirty percent cheaper than the branded rivals. Usually, the open and unpacked or unbranded spices are traded in the informal sector, so-called the underground economy, which evades taxes and government regulations. Thus, it provokes considerable loss to the economy (Meghani *et al.*, 2008), equal to around 30 percent of the GDP (Arby, *et al.* 2010).

This study ascertains the domestic spice industry dynamics in a bid to offer proposals to the authorities and policy makers to convince and force the unbranded players to inhibit adulteration, produce homogenous quality, and market or brand them through packaged brands only (containing even simple packets) for the sake of identifying processors and the brand. In addition, it proposes the ways to private players in the branded spice industry to unite their endeavors through common media platforms in an attempt to raise primary demand via public awareness campaigns. This enquiry aims to learn about various dimension and nitty-gritties of spice industry in Pakistan in a bid to discover the ways to brand agricultural commodity-based unbranded industry. The core queries in nexus with this investigation are delineated underneath (which are to be learned through extant literature search except the last three queries that require input of primary data): What are the dynamics of the spice industry in Pakistan (i.e. facts and figures regarding industry size, demand, growth, and nitty-gritties)? Who are the key players operative in the domestic spice industry? What are the adulteration moves of the unbranded and especially un-organized spice sector that result in damages to human health? What are their campaigns towards branding of their products? How a conventional agricultural commodity-based industry can be branded to nourish consumption of hygienic foods like spices through creating primary demand for branded spices among masses? What is the role of public and private sector entities to raise awareness about the detrimental side effects of unpacked cum adulterated spices to human health? What measures are required to take stiff actions against those fowl players (engaged in breaching laws and ethical code of conduct) in the spice industry?

MATERIALS AND METHODS

Nature of research

This probe involves post positivism research philosophy to address its problem and research questions. It is widely used in qualitative researches. It tends to be systematic and scientific, which acknowledges its limitations that the data observed, garnered, and evaluated can provide reasonable approximation of the realities (Denzin and Lincoln, 2011). The research approach is inductive method that is helpful when investigators strive to explore a specific phenomenon (Malhotra, 2009). This is an exploratory investigation and is qualitative in nature, since the researchers intend to discover rudimentary issues in branding of a commodity-based industry. The secondary data has been garnered through

extant literature and the primary data has been accumulated through a focus group of nine individuals, inclusive of three each from consumer groups, grocery retailers, and field experts belonging to spice industry. Their age groups fall between 30-40 years, adult males with three ladies, two from consumers and one from the expert panel. They belonged to different professions, income, and ethnicities, but all were graduates from Karachi and belonged to the middle class strata of society. Focus groups sessions are widely applied in exploratory studies (Denzin and Lincoln, 2011; Saunders *et al.*, 2011). The questionnaire for the focus group is open-ended cum semi-structured (Malhotra, 2009; Denzin and Lincoln, 2011). The data analysis techniques consist of interpreting the primary data obtained through focus group session/interview is simply a descriptive cum narrative analysis, which is enough since it tends to be an exploratory probe. The process contains the crucial steps of transcribing the data to content analysis of the discussion (Denzin and Lincoln, 2011).

RESULTS AND DISCUSSION

Conceptual framework

An integrated conceptual framework illustrated in Figure 1 contains utmost essential constructs involved in the overall domestic spice industry. They consist of: spice industry Pakistan comprising branded sector and unbranded sector, hazardous effects of adulteration in unpacked spices, public-private sectors' initiatives for quality measure, and branding of spice industry Pakistan. These are further expounded in the following literature.

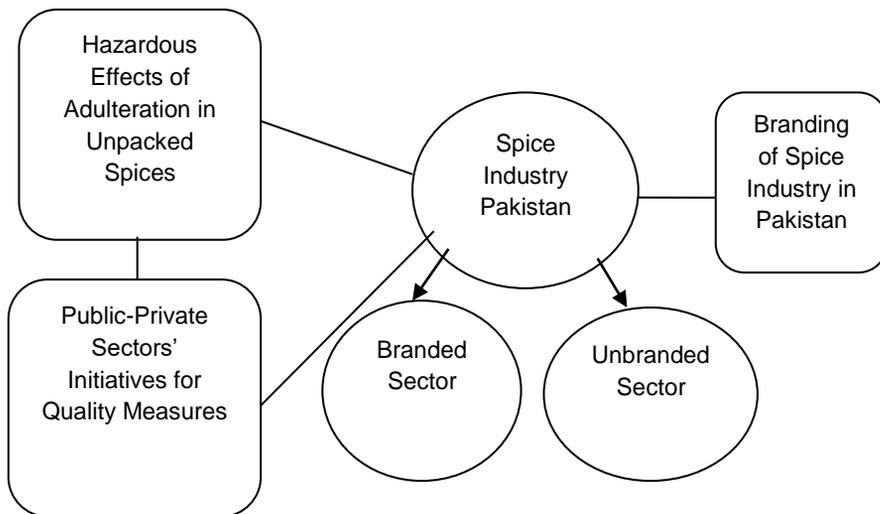


Figure 1. Conceptual framework on branding of spice industry in Pakistan

Spice industry in Pakistan

Spice industry in Pakistan is one of the major sub-sectors of the food sector. Its market demand, size, consumption, and growth patterns portray a splendid picture. The industry records an amazing growth rate of fifty percent, whereas the

market leaders like National Foods Limited and Shan Foods (Private) Limited also thrived at the same rate of the industry (Meghani *et al.*, 2008). Spices are basically food additives and are prepared or processed from dehydrated vegetables and plants. Conventionally, the populace of South Asian countries is fond of spicy foods as they make the cooked food incredibly tasty. Traditionally, women used to process or grind spices at home. Spices have medicinal properties and health benefits too, provided they are taken in reasonable quantities (CNN, 2006). The domestic industry of spices contains branded and unbranded segments. Surprisingly, the branded spice segment possesses only twenty percent market share, in which National Foods and Shan Foods dominate and they both enjoy forty percent market share each. On the other hand, the unbranded, usually loose or unpacked and un-wholesome segment enjoys the major chunk of the market up to eighty percent (Meghani *et al.*, 2008). "According to (SMEDA, 2008), there are about 7000 spices and salt grinding units operating in Pakistan, 60% of which are rural based (Meghani *et al.*, 2008)." The total demand of spices is met by 85% from domestic production, while the rest of it through imports. Kunri, a small town in Sindh produces 85% of the total yield in Sindh (Sindh Board of Investment, 2015). In addition to domestic production, spices are imported as well to cater the growing demand. Pakistani spices are exported to South Asia, Middle East, Malaysia, Singapore, Japan, Australia, UK, Germany, Holland, USA, and Canada, etc. Shan Food is a global company from Pakistan that has presence in sixty five countries around five continents and manufacturing facilities in three continents including Asia, Europe, and America. It has officially launched its brands in India as well (Shan Foods, 2015).

The chief operating officer (COO) of Shan Foods, Faisal Mubin Ganatra states that the market size of the spice industry in terms of volume stands 60,000 tons, of which 25,000 tons is branded and the rest is unbranded (Andrew, 2015). In terms of Pak rupees, the value of the industry is Rs. 25 billion (Ibid, 2015; (SMEDA, 2010). However, the chief commercial officer (CCO) of National Foods, Adnan Malik disagrees to that figure and estimates it to be around Rs. 35 and 40 billion (Andrew, 2015), whereas according to Andrew (2015), Shan Foods enjoys 41% market share in recipe mixes and 8% in plain spices, while National Foods enjoys 49% market share in recipe mixes and 10-12% in plain spices. It means that 90% market share in recipe mixes lies with the two early bird catchers, while the rest of the industry possesses only 10% share. The head of marketing and sales of Mehran Food Industries (established in 1975 with the aim to export only to Middle East markets), Sajjad Qaisar claims to have 8-9% market share in recipe mixes, which is denied by Ganatra. He reckons that the domestic market for plain spice and recipe mixes is growing annually by 10% and 20 to 25%, respectively (Ibid, 2015).

The rapid urbanization coupled with changing societal needs, convenience-seeking attitudes and behaviors, rise in nuclear families, increasing number of working women, attractive packaging and advertising of spices, and their increasing brand portfolio led to ever-escalating consumption of spices to an unprecedented level. The target audience in the commercials of spices usually remains women of all the socio-economic classes (SEC), A, B and C and they fall in the age bracket of 15 to 35 years. The prices of branded spices tend to be

thirty percent higher than that of the unbranded ones. Renowned super stores have also introduced their in-store brands that are competing with the key players in the industry (Meghani *et al.*, 2008). The market giants like National and Shan embarked the race of quality, standardization, and attainment of global certification for excellence in operations. They invested heavily in research and development (R&D) and technological supremacy. They possess ISO 9000, ISO 22000, the ISO version of Hazards Analysis and Critical Control Point (HACCP), and lab testing certificates, etc. (National Foods, 2015; Shan Foods, 2015). As the brand portfolio of these market leaders and other prominent players like Ahmed Foods, Mehran Foods, Habib Foods, Chef's Pride, Zaiqa Foods, and Kitchen Secrets kept increasing, the specific generic categories were introduced through various brands and sub-brands. They include biryani mixes and salt, karahis, qormas, curry spice mixes, barbeque spices, tikka masala, stirs for fried foods and deep fried foods, spices for breakfasts, kaali mirch, haldee, mixes for Arabian and Chinese dishes, etc. (Meghani *et al.*, 2008).

Hazardous effects of adulteration in unpacked spices

Dearth of affordability (due to low income and poverty) remains the chief reason for purchasing unpacked or loose spices at cheaper prices. In addition, the rural masses lack awareness about the detrimental repercussions on their health in the short and long run. Adulteration in open spices is a critical issue. "Open red chili powder contains talcum powder, saw dust, brick powder, sand, dirt, etc. (Ibid, 2008)." The absence of quality controls and adulteration correlate with fourteen ailments including stomach ache, gastroenteritis, diarrhea, rash, nausea, mental retardation, cancer, and other toxic effects on health (Brody, 1983; Ibid, 2008). Lack of ethical code of conduct, rule of law, and undermined anti-trust laws further aggravate the situation. Rampant corruption by Police, food inspectors, and other authorities shield the ugly mafia engaged in such traffic.

The role of public and private sector initiatives for stern quality measures

In Pakistan, Ministry of National Food Security and Research (2015) has the jurisdiction to oversee the affairs of food quality and safety along with specific regulatory checks and balances. At federal and provincial level, food inspectors have the responsibility to make sure that stern benchmarks for quality remain in compliance. So far, the authorities have been failed to address and thwart the issues of adulteration of foods and sub-standard foods. But to some extent, Punjab Food Authority (2015) has done some marvelous work by exercising raids on the rackets involved in such malicious traffic (Punjab Food Authority, 2015; The Express Tribune, 2015). At private sector level, the chapters of Chamber of Commerce and Industry (CCI) and Civil Society Organizations (CSOs) have been raising their voice against such culprits. Among private forces, media has played the paramount role by un-grubbing the culprits involved in producing adulterated and sub-standard foods i.e. of low standard, or having less or over quantity of mentioned ingredients, or change of specifications, lack of cleanliness and hygienic measures during procurement of ingredients and production (Oxford Dictionary, 2015). The TV programs, 'Sare Aam' of ARY News (2014; 2015); 'Khufia' of Abb Tak (2015), and such other programs air the stories i.e. case studies of various illegitimate producers and traders of spice and

other edible items. They arranged raids on them by inviting police, magistrates, food authorities, and others. Such initiatives have substantially enhanced awareness among masses about food hygiene and quality standards, and changed their perception cum attitude toward using branded goods. But the dilemma is that the majority of them face the problem of affordability, so they deliberately remain ignorant of these initiatives.

Branding of spice industry in Pakistan

All the players in the packed and branded industry in Pakistan have a variety of brands and sub-brands and they apply all the contemporary tools of marketing to nourish the consumption of packed, standardized, and branded spices. The market segments that they have targeted comprise of convenience seeking-women and health conscious consumers. The market leaders, National Foods and Shan Foods have positioned themselves as promoters of high quality, standardized, and wholesomely packed products. Their brands contain fascinating packaging, priced competitively, distributed nation-wide, and promoted through TV, radio, and print advertisements, billboards, sponsorship of cooking contests, and food recipes in TV programs, etc. Their products are exported in various countries of the world and distributed among the leading retail and chains of stores in the world. To promote their brands globally, they often participate in worldwide export fairs. Shan Food expands its retail presence through its global network with international retailers and super stores chains like Walmart, Carrefour, Lulu Hypermarkets, Panda, Emirates Mall, Reliance India, and so forth. Its online sales to its global customers are executed by Amazon.com (Meghani *et al.*, 2008).

In an attempt to brand an entire industry and raise its primary demand, the packed milk producers in Pakistan ran a successful campaign at massive scale to create awareness among populace about the salience of packaged milk and resulting health benefits. Together, all the leading players sponsored such advertisements and the general public especially the educated class comprehended that the open milk contains some impurities, so they had better to consume the standardized and wholesomely processed packaged milk (The News, 2015). On the same pattern, recently, the leading Islamic banks operative in Pakistan jointly sponsored commercials to raise awareness about their Islamic product portfolio. Consequently, the domestic Islamic banking industry has substantially grown its size by recording decent annual growth (Dawn, 2015).

A robust tool in brand building is customer based brand equity (CBBE). In order to build CBBE, the interested players have to follow a CBBE development process, which is a sequential or stepwise process to differentiate the brand from rivals in the market and enhance brand knowledge of consumers, which would ultimately lead to their increased response to the marketing activities of the firm (Aaker, 1994; Keller, 1993; 1998). This process resumes with identifying and establishing brand positioning. It would enable the brand to occupy a distinctive cum unique place and associations in the minds of the consumers (Aaker, 1991; 1994; 1997; Farnfield, 1999; Grace and O'Cass 2002; Keller, 2003; Keller and Lehmann, 2006). For establishing brand positioning, they should first identify the competitive frame of reference. The competition should not be determined narrowly and marketing myopia should be avoided in that case. It means that not

just other branded spices should be considered competition but unbranded suppliers and other items in food industry that could be a substitute for spices (such as, salt, sugar, and flavors) should be kept an eye on. Determining competitive frame of reference would help identify product category and its points-of-parity (POPs), which are the features that equates its quality or performance with the close rivals. Next, they should determine product category's points-of-difference (PODs) which are the features that distinguish it from the rest of rivals. POPs and PODs need be communicated regularly with the customers to enhance brand knowledge and develop its superiority as compared to its rivals. This could be done by repeated exposure of consumers to the marketing efforts of the business (Keller, 2012).

While developing and establishing positioning, it is mandatory to make sure that the positioning should be updated overtime to be up to date, modern, and catchy to meet the changing life style of consumers. With the emergence of nuclear families, more working women and a shared pool of family income, spending pattern is changing drastically and it should be addressed in the positioning of the brand. After establishment and planning of desired positioning, the second step in CBBE development process is to plan and implement marketing program (Ibid, 2012). Applying an integrated marketing approach is to target the customers holistically and imposing customers to the marketing efforts including the product decisions, pricing aspects, availability and distribution of brand, and communicating and promoting the brand to make the brand climb up the building blocks of brand equity. Building blocks of brand equity includes brand salience, brand performance, brand imagery, brand judgment, brand feelings, and finally up to the levels of brand resonance that cause the customers to become loyal with the brand, and they advocate the brand to others users and non-users (Cleaver, 1999). At brand resonance level, a customer has an attitudinal attachment with the brand and engages himself willingly in the brand building activities. Implementation of marketing activities will enhance customers brand knowledge which includes brand recognition and recalls. If customers possess brand recognition and recall, this clearly indicates that positive brand equity exists (Farquhar, 1989). Updating marketing activities contributes positively to CBBE and its development, which leads to the next or third step in the process. It leads to measuring and evaluating brand equity and its source to track the aspects of marketing that can help to further understand the brand and how brand equity could be further increased (Keller, 2012). Measurement and evaluation of brand equity includes quantitative and qualitative researches like brand audit, brand exploratory, brand explanatory, brand tracking studies, and implementing brand management system. Lastly, CBBE includes maintaining brand equity over periods of time and across geographical boundaries as the brand grows as in case of Shan Foods and National Foods (Ibid, 2012).

Analytical approaches

Based on the study problem and research questions, when inquired about branding the spice industry, the participants opined that a conventional commodity-based industry can be branded by providing the product with a unique name and identity and establishing other brands elements which could make the commodity a 'Brand'. The industry must apply brand associations that

should be distinctive, unique, and favorable to the customers, which must be desirable by customers and deliverable for the company. Leveraging brand associations include its superior quality, taste, and wholesome ingredients. Another important element is the packaging that reflects the high quality and develops superior customer perceptions that justifies the 30 percent higher prices charged by branded spices than the unpacked ones. The logo, brand slogan, and brand mantra (i.e. promise to deliver a superior and distinguished value) are also important here in this case. The industry players can also avail any brand characters, jingles, celebrities, or spokespersons, which will all assist toward establishing the brand equity. They should increase the brand knowledge and the network of brand associations mapped in the customer's mind to build a distinct brand positioning, which would help them distinguish the brand from the commodity, increase its image and make it preferable for them.

The competing firms in the branded spice sector need effective integrated marketing communication (IMC) plan, which would help them to build brand equity. IMC includes usage of the promotional mix elements in the most appropriate proportion to enhance brand recognition by consumers leading to building brand equity. They include advertising, trade and consumer promotions, personnel selling, public relations, and direct marketing. Advertising not only informs and persuade consumers, but continuously remind them. The key players exploit advertising media through TV, Radio and print commercials including magazines and news papers' ads. However, the market leaders like National and Shan usually advertise seasonally, especially during Ramadan and Eid festivals. Despite developing innovative advertising and marketing campaigns, their campaigns revolve around only for few brands, especially the new ones. In small towns, branded spice promoters should reach the middle class families through cable TV operators to convince them to use branded spices for a healthy life style. In addition, promotional campaigns in various shopping malls are undertaken to educate the potential customers. The mall activities, free distribution of product catalogues, and having kiosks, not just in malls, but in famous public places can further improve the brand presence and brand knowledge. College level promos, cooking contests, and other consumer promotions also take place. Activities like tele-branding and telemarketing can also be supportive in this regard. In villages and far flung areas of the country, consumer health awareness campaigns need to be augmented. Opinion leaders and religious clerics need to be approached and compensated to spread the message in rural gatherings and mosques. Personal selling is also an art to add great value to sales. The branded spice industry players should also avail that. Personalized marketing with the help of a sales force include one-to-one marketing to household consumers and thousands of restaurants and in the country. In addition, relationship management would help them in further penetration in the market, especially in the rural territories with unbranded spices. Moreover, in a bid to enhance public awareness of packaged, branded, and wholesome spices, they can invest further in public relations activities, especially in the areas where unbranded and unhealthy spices are being used. They should sponsor events and health programs to relate and expose themselves to the target market and its audience or customers. They should especially plan and sponsor awareness programs to bring the unethical practices up to the surface

and educate people about the dark side of this industry. It would help them improve the corporate credibility and brand image. Appearances in important trade shows, celebration of important national and international days, demonstrations of recipes in TV programs, etc. will trigger to build strong rapport with customers, the general public, civil society, media, and even the government agencies, such as the food department. Direct marketing activities can enable them to supply the goods directly to the consumers without any formal distribution channel. In addition to the existing distributors/dealers, it can also be optimized.

The effectiveness of the marketing campaign can be judged on two parameters: whether the communication objectives and financial objectives of the company are met or not. For export-oriented spice companies like National Foods and Shan Foods (a global company) should sponsor global events to generate the image of global presence and prestige. Shan publishes an online newsletter having description about various recipes. It should develop a database of loyal consumers, especially household ladies and chefs and trade channel customers and send it to them. Keeping in view the price sensitive customers in spice market and an increasing lower class, the key players in the spice industry should come up with more promotions, discounts, and schemes like economy packs to cater and compete with unbranded spice suppliers in a better way. Slashing the prices for some a year or two may trim their profit yields, but the chances are that due to incremental sales turnover along with enhanced market penetration and market share, eventually, they will earn higher profits. A conventional agricultural commodity-based industry like spice industry can be branded for the sake of nourishing consumption of hygienic spices through creating primary demand for branded spices among masses. It requires the collaboration or strategic alliance of mega players in the game, as they can pool in resources to advertise collectively about the hazardous side effects of unpacked cum poisonous spices. They can prefer TV medium but must earmark funds for running the campaign via radio, social media, and newspapers cum magazines. The measures required to take stern actions against those fowl players (engaged in breaching laws and ethical code of conduct by selling unhygienic cum hazardous spices) in the spice industry can be holding raids on them and the intermediary dealers involved in their supply chain. A law needs to be passed from the parliament that loose or unpacked, hazardous, and adulterated spices need not be sold in any way. The producers/processors must do branding, packaging, and labeling to specify their brand name and other hygiene-related mandatory specifications on their packets. The packaging can be simpler to save their cost but these things must be labeled. Special audit teams of food inspectors and health plus law enforcement authorities should be made to audit the premises of unbranded spices manufacturing unit and force them to improve quality standards and give name to every product. In case of non-compliance, they should instantly seal that manufacturing/processing unit. The wholesalers and retailers involved in such illegitimate trade should also be heavily penalized.

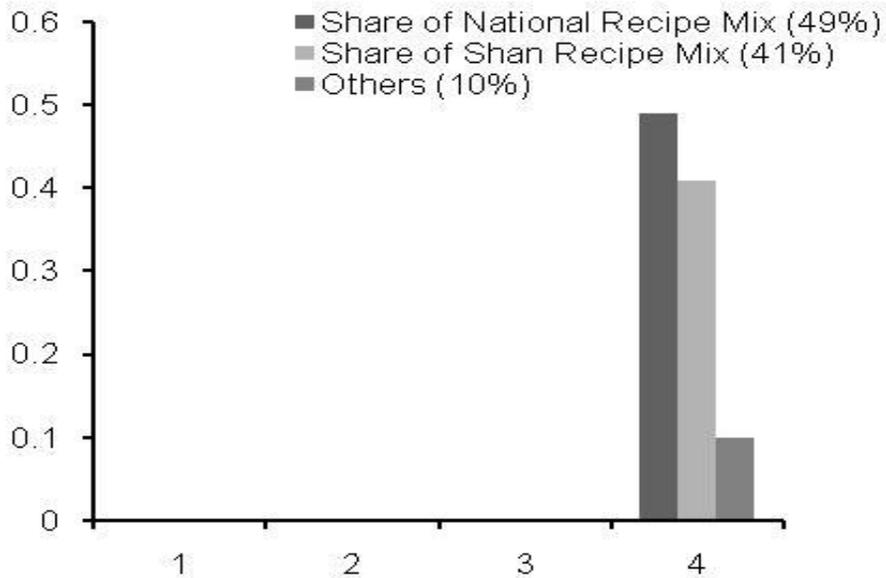


Figure 2. Spice industry highlights (market share)

Table 1. Spice industry highlights (market size and growth)

Market size of industry by volume	Market size of industry by value	Annual growth of recipe mix category
60,000 tons	Rs. 35-40 billion	15-20 percent

CONCLUSION

Finally, based on the research objectives and subsequent research questions strived to ascertain about learning various aspects, facts and figures regarding industry size, demand, growth, and nitty-gritty of spice industry in Pakistan, it was discovered through literature that the size of the domestic spice industry appears to be 60,000 tons worth Rs.35-40 billion per annum. The market for plain spice and recipe mixes is marking amazing annual growth by 10 percent and 20 to 25 percent respectively. The industry is dominated by the unpacked/loose and unbranded spice sector that enjoys almost 58 percent market share and the branded spice sector has 42 percent share. Due to poverty, inflation, and decreasing incomes, a vast portion of the population (pertaining middle and lower classes) remain indifferent with the quality consciousness and wholesomeness of spices. Regarding the enquiry about the key players operative in the domestic spice industry and their campaigns toward branding of their products, the two major rivals exist including National Foods (dominating the market with 49 percent market share in recipe mix) and Shan Foods (that enjoys 41 percent share in the same category), small players in the branded spice sector enjoy 10 percent share, and numerous small unbranded cum unpacked spice processors and merchants also exist. The same is illustrated in Table 1 and Figure 2 given beneath about the spice industry highlights. The players in the unbranded and

especially un-organized spice sector often seem to be engaged in adulteration moves by adding inferior ingredients into spices such as, talcum powder, saw dust, brick powder, sand, dirt, etc. and resulting damages to human health including stomach ache, gastroenteritis, diarrhea, rash, nausea, mental retardation, cancer, etc. National and Shan apply the contemporary tools of branding containing advertising and integrated marketing communication (IMC) to create awareness in the general public and persuade them to buy the branded spices with the standard quality. A conventional agricultural commodity-based industry can be branded to nourish consumption of hygienic spices through creating primary demand for branded spices among masses. Similar campaigns are run domestically by tetra pack milk industry and Islamic banking industry to thrive the aggregate demand of their products. The role that the public and private sector entities including food, health, and law enforcement authorities undertake to raise awareness about the detrimental side effects of unpacked cum adulterated spices to human health include imposing forfeit on such culprits and seizure of their stock, but there appear loopholes on the part of food inspection teams and authorities. The media especially, some TV channels have also been exposing them. The regulatory measures required to take stiff actions against the fowl players consist of first warning them and then, seizure of their stock, sealing their facilities, and apprehending them for years.

SUGGESTIONS

Keeping in view the demand value, market size, consumption, and enormous growth of the spice sector in Pakistan and the detrimental effects of adulterated cum sub-standard spices sold through loose or unpacked way, the industry needs to be regulated and branded.

ACKNOWLEDGMENTS

The authors of this probe offer tremendous regards to the participants of the study that marvelously contributed in collecting primary data and the earlier authors whose works are cited in literature review.

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(Accepted July 26, 2016)