

AN ANALYTICAL STUDY OF RURAL AUTOMOTIVE LUBRICANT MARKET TO FORMULATE MARKET SEGMENTATION STRATEGIES

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ABSTRACT

The rural environment is in paradigm shifts and management needs to deal with the changing consumer behavior. The basic challenge in front of the rural marketer is to deal with the rural consumer who is undergoing transformation. The Lubricant industry in India is at its peak stage as the market condition are favorable for new opportunities to be explored because of massive increase in the income of people and growing economy, the standard of living of the people is improving. Habits, preferences and attitudes are changing rapidly. Various companies are joining hand to establish themselves into the Indian market. Increase motorcycle and car stock, growth in agricultural driven lubes consumption and a booming construction sector have been the primary factors to this. Even though rural areas of India are in a phase of fast growth backed up with potential in it, the marketing giants and cooperate faces a biggest challenge in reaching the rural markets of India. To be successful in the rural market, companies will have to be innovative and sensitive while devising marketing strategies. Traditional urban marketing strategies will have to be localized as per the demands of the rural market. This research presents a homogeneous market segment. The finding of this research provides a logical platform for the marketers and formulators of automotive lubricant and identifying the key characteristics, and possible gapes in the market. Under this research work the researcher has farmed out a well equipped questionnaire, clustering the linked purchasing patterns of the customers which can be used in segmenting the market and determining target markets, Product positioning and New product development. Clusters of similar brands/products can help identifying competitors / market opportunities. The researchers have come out with certain suggestions which can be utilized by the Marketers to enhance their brand visibility, goodwill and sales in the mystic rural markets of India order to build their brands in the rural parts of India and carry out their activities in an effective and an efficient manner.

Keywords: Automotive Lubricant, Branded lubricant, Branded thinkers, Rural market, Segmentation.

Introduction:

In the recent trends Indian rural markets have acquired the attention of all the national and international marketing giants and cooperate. Until a decade ago the national and multinational companies just focused on cities, built in the last few years this has started changing. More and more companies are realizing the potential of the rural market and have stated focusing on rural markets (Anamika Shau 2011)¹. India's rural population comprises of 12% of the world's population, presenting a huge untapped potential market in our country². There is huge potential in the Indian automotive lubricant market which today is worth Rs 25000 core³. Currently the Indian lubricant market is the sixth largest automotive lubricant in the world⁴. The global demand grew about 2.3% per annum to reach 41.7 million metric ton in 2010. India's growth was over 3% during the same period.⁵ (Annexure I).

Being the second largest producer of two-wheelers, and fourth largest in terms of commercial vehicles market globally.⁶ Rural demand in automobile and retail is growing at a faster pace than anticipated due to rise in its consumption patterns which is creating demand and margins for Indian Inc. even as meltdown is getting deeper, says a Study Paper of The Associated Chambers of Commerce and Industry of India (ASSOCHAM) 'The Rise of Rural India'. According to NACER, the rural share in automotive has increased from 30.5% in 1995-96 to 42.5% in 2009-10 followed by motorcycles, i.e., from 45.8% to 55.4%, mopeds from 37.3% to 46.6% and scooters from 25.2% to 32.0%. However in cars/jeeps it has increased from 7.4% to 9.3% only. According to Hyundai, car company "Almost 50 per cent of the 220 million households in rural India are potential car buyers due to the agricultural subsidies extended by the government and also due to increase in productivity of agri-based products, thus presenting an attractive market for hi-technology products". Rural markets remain untapped because of three Ds-"Distance, Diversity and Dispersion" according to D.K. Bose, Vice President, O&M Rural. Rural Marketing Association of India (RMAI) confirms that rural income levels are on a rise, and the habits, preferences and attitudes are changing rapidly The urban market deals majorly with a replacement policy, where old branded products are continuously replaced with new branded products, the rural market is still untapped. This offers great opportunity and scope for companies who can convert consumers to buy branded products and develop marketing strategies to treat the rural consumer differently from their counterparts in urban because they are economically, socially and psycho graphically different to each other⁷.

Rural markets suffer from the problem of low penetration and poor availability of branded products. Hence, although there exists a huge demand for branded products, there is lack of awareness, and poor distribution channels to make the product easily reach the customer As rural customer always wanted value for money with the changed perception, one can notice difference in current market scenario, the structure of competition in rural markets can be classified as follows competition from other urban national brands, from regional brands, from unbranded urban products from unbranded products of a particular village and finally indirect competition from substitutes. It is evident that in the village low-priced brands are accepted and so there is a substantial volume of sales for unbranded products in rural markets⁸

According to Ravi Kirpalani, COO of Castrol India Ltd (2010)⁹ says to focus on rural markets, the company is now planning to increase the share of distribution infrastructure to reach out to six lakh villages, currently the distribution reached between 5000 and 7000 towns and villages across the country, eventually the companies are aiming at taking its products to six lakh villages with a population of less than 5000. Harjinder Singh Heer, Managing Director of India Analysis (2008)¹⁰ comments "Lubricant manufacturers who produce premium products and invest in marketing and distribution can expect to benefit from the growing opportunities in the Indian Automotive Lubricant Market". According to Bijoor, CEO of Brand and Business strategy consultants Harish Bijoor Consults, "Companies are realizing that the urban and rural want is largely the same. However, the rural person is savvier and demands real value for money. To offer this, marketers are re-engineering products. Look at the auto segment. The urban man wants a car as does the rural man. Both have the same amount of money. The rural person, however, believes spending US\$12,000 on a car is a sin. He wants it at US\$3,000. The Nano is a solution. Every category needs to operate on the Nano paradigm. The needs are all the same, across rural and urban. The solutions have to be different."

Lubricants play a very vital role in the smooth & trouble free operation of any vehicle. Branded oil provides value for money, good quality, quantity, Low maintenance, last long, improves life of engine, eco friendly environment, latest technology. To be put in one single line "Engine is the heart of your steed where oil is the blood that makes it work"¹¹. , According to jobbers world survey conducted in US markets, 90% major oil

companies feel there is an issue with low quality/off-spec lubricants which not only affects the sales and profits of the corporate but majorly affects the brand image of the original products¹²

In the rural areas, consumers generally take decision based on availability of lubricant brands and the recommendations/suggestions from the local garages/ authorized service stations, retailer, mechanics or key decision makers in the family. Identifying customer, their needs in that market allows products to be designed with greater precision and direct appeal with the segment. Customer perceptions, allows a company to see where its product are positioned in the market relative to those of its competitors. . Targeting specific segment is cheaper and more accurate than broad-scale marketing. Customers respond better to segment marketing which address their specific needs, leading to increased market share and customer retention.¹³ It will guide various lubricant manufacturing companies about modifications required in the present marketing strategies for tapping rural markets and to build their brands in the rural parts of India and carry out their activities in an effective and an efficient manner.

Factors selected for the clustering similar consumers perceptions/attitude for the present study were Availability , Awareness, Affordability, Advertisement, Brand Image , Price, Packing , Promotional scheme , Recommendation of service station/ Mechanic, color of lubricant and consumer buying behavior. Factors were taken from some related studies on rural markets.

Addressing the issue of the rural gap and reaching the rural masses can be addressed by falling on the Bottom of the pyramid (BOP) marketing strategies as advocated by Prahalad (2004)¹⁴ and the 4 A' Availability, Affordability, Acceptability and awareness (Anderson and Biliou 2007, Kashyap and Raut 2005)¹⁵ . Bop marketing strategies basically talk about the demand of consumers who have low individual purchasing power and are spread out. Many consumers use price as an indication of the quality of the brand which is an important factor in purchasing decision (Nilson, 1998; Kotler& Armstrong, 1989)¹⁶ Place or the distribution channel is a combination of institutions through, which a seller markets product to user or ultimate consumer (Peter & Donnelly,1992)¹⁷. Promotion is communicating information about the product between a seller and a buyer in order to create brand values and brand profile (McCarthy and Pereault, 1984)¹⁸. The product characteristics such as package, ingredients, and colour play a significant role. The attributes are evaluated by the consumer based on his/her own values, beliefs, past experience (Peter & Olson, 1990).¹⁹ The social factors refer to the influences made by the consumer's reference groups such as the family & friends. Consumers are more likely to be influenced by word-of-mouth information from members of reference groups than advertisements or sales people (Stanton et al, 1991)²⁰ The task of distributions in these areas is considered to be more difficult than in urban areas (Mandira 1977)²¹. Direct delivery of goods even to the top one percent of villages cost twice as much as servicing urban markets (Ganguly 1985)²² A greater brand loyalty among consumers leads to greater sales of the brand (Howard and Sheth, 1969)²³. Brand loyalty leads to certain marketing advantages such as reduced marketing costs, more new customers and greater trade leverage (Aaker, 1991)²⁴.

There is a visible shift from local and unbranded products to national brands .From low priced brands to premium brands. Pritesh Chothani(2006)²⁵.

Literature Review:

(Awadesh Kumar Singh & Satyaprakash Pandey (2005)²⁶ feel Indian rural market can be called a “sleeping giant” since it holds vast untapped potential and Rural market environment has changed along with the rural consumer who has become conscious regarding quality and price.

Sanal Kumar Velayudhan (2007)²⁷ in his book, refers ‘Profile of the Rural Market’, its size, physical coverage, demographic profile of the market, market volume, consumption experience, use of consumer durables and expenditure on consumer non-durables. At the end, there are decision implications where the author has shared about the widely dispersed villages and lookout for ‘Value for money as a major challenge. “India’s rural market is a gold mine, but largely remains untapped by the Indian corporate sector. During recent times, some companies and organizations have implemented innovative projects to tap the rural market and deliver value added services to the doorsteps of the rural people through Internet-based marketing initiatives.” Suvadip Chakraborty,(2010)²⁸ According to National Council for Applied Economic Research (NACER) surveys, then income of the average villager is rising ,recession is hardly possible in rural India. (Bishnoi, 2001)²⁹While talking about the profile of rural consumers it can be observed that it is changing rapidly, rural consumers are

becoming more aware and buying more luxuries than ever before. According to Pareek (1999)³⁰, the Indian rural market has immense untapped potential. The rural market's importance arises out of the fact that India lives in her villages both literally and metaphorically. There is a vast difference in the life styles of urban and rural consumers. The rural consumers are economically, socially and psychologically different from their urban counterparts. In rural markets, brands rarely fight with each other they just have to be present at the right place. Brand choice available in rural is half that of urban (Bansal and Easwaran, 2004)³¹. An Article in The Hindu (2004)³² quotes that present need is to understand the psyche of the rural consumers in terms of needs, to tailor the products to meet such needs and to deliver them effectively. The Indian Lubricant Industry will expand rapidly. The public sector is losing its position into market and private players are emerging in the market. Tie ups with OEM is need for expanding business³³. Total production of automotive lubricants in India is approximately 8 to 10 percent of global lube production; the Indian market has been growing at approximately 7% for the past 2 years.³⁴ A field survey across Dhaka city revealed that, gradual increase in the volume of lubricating oil was experienced irrespective of vehicle model, vehicle age and brand of lubricating oil used. The problem was found to originate from unbranded oil, having low viscosity, which may lead to high rate of engine wear and poor performance of vehicle. The above activity was practiced to gain financial benefits³⁵. According to Times of India a racket was busted in Vijaywada They were using brand names like Servo & Shell to sell these fake products mostly in rural areas. Color chemicals were being used to make fake lubricants look like original products of these companies³⁶. Accenture e Research report (2010) chronicles the business sectors growing confidence in India rural markets. Accenture surveys results to demonstrate the strength of business leader's belief in the future of rural opportunities. The report also offers framework identifying three distinctive capabilities –the ability to create, shape and develop markets, the ability to adapt and optimize supply chains. India's rural market offer unprecedented opportunities for global and local companies to experiment with approaches and business models, which if successful, may be replicated in rural markets of other emerging economies³⁷.

Research Questions:

Rural consumers are far less homogeneous than their urban counterparts and differ from region to region. In rural areas, new entrants will have to deal with different and evolving customer needs than their urban areas, a relatively poor distribution infrastructure, a market crowded with competition and niche markets. Hence, this study intends to gain insight into perception of rural and urban consumers about profiling the Automotive Lubricant Market and to identify key characteristics. To identify people with similar patterns of past purchases so that marketing strategies can be tailored accordingly by the lubricant marketers. Literature review and empirical data has suggested a set of large number of variables affecting the purchase decisions of lubricants. However, there is no evidence about the applicability of these variables for the rural consumers in India. Further, for any practical application of this set of observations or cases, it would be necessary to consolidate them into smaller set of clusters. Each cluster being a representative of a certain similar characteristic, but different from other clusters. Such analysis will also facilitate development of their relationship with brand-related choices.

Research Methodology:

The researchers have adopted descriptive research design for this Study. To address the research questions outlined above, a survey instrument was developed for this study. The initial survey items assessed demographic parameters along with actual automotive lubricant purchase behavior based on previous experiences, automotive lubricant purchase intention based on price and expectations, and behavioral intention for specific brand/ brand-categories and for specific sellers within each category. All participants had purchased the automotive lubricant before the time of the study. The survey draft was pre-tested with individual automotive lubricant buyers and revised based on input from the pre-test respondents. The cluster analysis was applied to test the significance of the difference between perceptions of customers in buying automotive lubricant. Cluster analysis represents a homogeneous market segment or observations. Consumers with similar buying habits or demographics, characteristics and attribute preferences are clustered. The goal of cluster analysis is to identify the actual groups. Objects in a cluster are similar to each other. They are also dissimilar to objects outside the cluster. It will guide various lubricant manufacturing companies about

modifications required in the present marketing strategies for tapping the rural markets successfully. As the study focuses on rural markets of India, data was collected from the largest rural district in Maharashtra state named Ahmednagar³⁸. Both Primary and Secondary data were used in this study. The survey was conducted through a well structured questionnaire with a random sample of 100 automotive lubricant buyers. The research instrument asked respondents to indicate if they had ever purchased automotive lubricant. Further questions were open ended and closed ended questions using Likert scale. The respondents were asked to indicate, on a five-point scale, about factors affecting the purchase decision and clustered similar buying habits into different subgroups. The other questions were based on the demographics of the respondent. Responses were verified through personal interaction to ensure accuracy of the data.

Results, Discussion and Findings:

On the basis cluster analysis, we will describe 4 clusters as follows

Cluster 1:

People belonging to this cluster are think that men can't care children same as women but also they think that male and female shouldn't tread equally. They aren't considering that men are the main source of income in the family. They aren't gives the lot of respect to his community. They are shows the sensitive side. They are not sure that regarding importance of experience with education for getting a job. They are ready to talk on his feelings. They are agreeing on the sports only made for man. They are not satisfied with current health service. They are completely agreed on that the promotion should base on the customer education. They are not sure about price, brand image and promotion of the lubricants is the important factor. They are agreeing on that mechanic/ service station should give the suggestion regarding use lubricants for motorbike. They are thinking that branded lubricants should easily available; they also think that branded lubricants should available in pouch. This group people think that the packaging and color of the lubricant is not considerable factor. They are not thinking that the lubricants marketers should use all kind of promotional tools. These are quality conscious.

Cluster: 2

People of this group aren't definite regarding equality of man and women. They are positive as regards the community respect, exploration of sensitive side and experience importance in life. They think that feeling will not discussing things. They are completely disagreeing to the consideration of sports only made for man. They are not satisfied with current health service. They are also disagreeing on customers education based promotion of product. They are price sensitive people. They are not give the lots of importance while purchasing lubricants from the market these factor such are brand image, promotion, suggestion form service station/mechanics availability and availability of branded lubricants in pouch. They are considering the packaging and color of lubricants while purchasing the lubricants. They are positive towards the use of different promotion tools from marketers. They are quality aware people.

Cluster: 3

People belonging to this cluster not treated male and female equally. They are disagreeing to shows his sensitive side and talking about his feelings. They are not considering men as a main income earner in the family. They are not gives a good respect to the community. They aren't considering that the work experience is more important than education. They think that sports made for man and women. They are not satisfied with current health service. They are also disagreeing on customers education based promotion of product. They are price sensitive people. They aren't consider the following factors with regard of lubricants such as price, brand image, promotion, suggestion form service station/mechanics availability of branded lubricants. They believe that lubricants should available in pouch also. They are considering the packaging and color of lubricants while purchasing the lubricants. They aren't sure to use of all kind of promotional tools by the marketers. They aren't quality believers.

Cluster: 4

People belonging to this cluster not consider the equality of male and female. They aren't thinking that man is the chief breadwinner in a household. They aren't community respective people. They aren't sure to disclose the sensitive side and talking about feelings. They are judge work experience and education equally. They believe that sports is the made for man. They are not too satisfies with Health Services. They are price sensitive people. They are also disagreeing on customers education based promotion of product. They are price sensitive people. They aren't sure to the consideration of brand image, promotion, and suggestion form service station/mechanics availability, availability of branded lubricants in pouch and packaging of lubricants. They are not like lubricants in a pouch. They are neutral regarding the use of promotional media form the marketers. They consider the color of lubricants while purchasing the lubricants for motorbike. They aren't quality alert people.

As the distances between Final Cluster Centers are significant, these value shows that cluster clearly differ from each other. Thus, the sample is fairly divided among all three clusters. The ANOVA table generated by SPSS output is given in table 5 The F test revealed that all the variables selected for the study are significant at 100 percent confidence level.

Conclusion and implications:

Our research in automotive lubricant market in rural India tries to develop the rational platform to the automotive lubricant marketer for the segmentation of market. The finding of this research shows that the rural market consumers of automotive lubricants are largely branded thinkers. This research also shows that we can associate the some physiological factors with product features for the segmentation of automotive lubricant market Each cluster thus describes in terms of the data collected, the class to which its members belong, and this description may be abstracted through use from the particular to the general class or type. Profiling of Automotive lubricant market allows a company to see where its products are positioned in the market relative to those of its competitors Value for money always matter for the rural consumers while purchasing the automotive lubricant. This is the indications of rural consumers moving form selection of unbranded lubricant to branded lubricants. From this study, it is recommended that the company should increase their marketing to create a better awareness for their brand, therefore advertising and promotions are important to increase the purchase of branded lubricant. Since mechanic plays an important role there emphasis should be given by encouraging the mechanics to promote the brand. Perhaps incentives should be given to mechanics to promote the brand Findings of this study offer significant implications for the sellers of automotive lubricant.

Annexure I: Growth Trend of Indian Automotive Lubricants Market

Year	Rate
1990-91 - 1996-97	2.5%
1996-97 - 2001-02	2.0%
2001-02 - 2006-07	4.5%
2004-05 - 2009-10	3.5%
2009-10 - 2014-15	4.0%
Sensitivity Coefficient	5.0%

Source: <http://www.indiastat.com>

Cluster Analysis:**Table-1:Processing Summary**

Cases					
Valid		Missing		Total	
N	Percent	N	Percent	N	Percent
100	100.0	0	.0	100	100.0

- a. Squared Euclidean Distance used
- b. Average Linkage (Between Groups)

Table-2: Agglomeration Schedule

Cluster Combined				Stage Cluster First Appears		
Stage	Cluster 1	Cluster 2	Coefficients	Cluster 1	Cluster 2	Next Stage
1	50	100	.000	0	0	98
2	49	99	.000	0	0	73
3	48	98	.000	0	0	58
4	47	97	.000	0	0	73
5	46	96	.000	0	0	83
93	1	14	38.125	92	37	95
94	7	12	38.639	89	91	96
95	1	24	39.800	93	27	98
96	7	40	43.125	94	11	97
97	7	37	44.500	96	77	99
98	1	50	46.395	95	1	99
99	1	7	59.552	98	97	0

Table-3: Initial Cluster Centers					Table-4: Final Cluster Center				
	Cluster					Cluster			
	1	2	3	4		1	2	3	4
VAR00001	2.00	2.00	4.00	5.00	VAR00001	1.86	2.33	4.30	4.80
VAR00002	2.00	2.00	5.00	5.00	VAR00002	2.29	2.33	4.27	4.70
VAR00003	1.00	2.00	4.00	5.00	VAR00003	1.57	2.33	3.87	4.50
VAR00004	1.00	1.00	4.00	5.00	VAR00004	1.57	1.67	3.93	4.50
VAR00005	5.00	1.00	4.00	4.00	VAR00005	3.57	1.33	3.47	3.70
VAR00006	2.00	1.00	3.00	4.00	VAR00006	2.43	1.33	3.67	4.00
VAR00007	5.00	5.00	3.00	3.00	VAR00007	4.00	5.00	3.23	3.00
VAR00008	4.00	5.00	3.00	3.00	VAR00008	3.86	5.00	3.00	2.60
VAR00009	2.00	5.00	3.00	4.00	VAR00009	2.14	4.00	3.03	3.30
VAR00010	1.00	5.00	2.00	5.00	VAR00010	4.43	4.67	3.20	4.00
VAR00011	1.00	2.00	4.00	2.00	VAR00011	2.86	2.33	4.57	2.00
VAR00012	3.00	5.00	5.00	5.00	VAR00012	2.86	4.33	3.70	3.60
VAR00013	3.00	4.00	3.00	4.00	VAR00013	2.43	3.67	3.50	3.30
VAR00014	4.00	2.00	2.00	5.00	VAR00014	3.86	3.33	3.73	4.00
VAR00015	4.00	4.00	1.00	5.00	VAR00015	3.43	4.00	3.30	3.80
VAR00016	4.00	2.00	1.00	5.00	VAR00016	3.29	3.33	2.87	4.10
VAR00017	3.00	2.00	1.00	5.00	VAR00017	2.71	2.67	2.77	3.40
VAR00018	2.00	4.00	2.00	2.00	VAR00018	2.00	3.00	3.00	3.10
VAR00019	2.00	2.00	2.00	1.00	VAR00019	2.14	2.67	2.63	2.80
VAR00020	4.00	5.00	4.00	5.00	VAR00020	4.14	4.33	4.27	4.40

Table-5: ANOVA

	Cluster		Error		F	Sig.
	Mean Square	df	Mean Square	df		
VAR00001	32.931	3	.446	96	73.781	.000
VAR00002	23.905	3	.251	96	95.131	.000
VAR00003	29.222	3	.549	96	53.236	.000
VAR00004	34.288	3	.682	96	50.258	.000
VAR00005	9.368	3	.291	96	32.240	.000
VAR00006	16.755	3	.313	96	53.446	.000

VAR00007	8.422	3	.445	96	18.920	.000
VAR00008	11.642	3	.360	96	32.381	.000
VAR00009	6.037	3	.790	96	7.642	.000
VAR00010	9.733	3	.983	96	9.902	.000
VAR00011	41.326	3	.977	96	42.304	.000
VAR00012	3.851	3	.838	96	4.595	.005
VAR00013	4.599	3	.583	96	7.890	.000
VAR00014	.793	3	.529	96	1.499	.220
VAR00015	1.870	3	.659	96	2.840	.042
VAR00016	7.692	3	.635	96	12.121	.000
VAR00017	2.279	3	.789	96	2.889	.039
VAR00018	4.253	3	.935	96	4.547	.005
VAR00019	1.273	3	.877	96	1.452	.233
VAR00020	.193	3	.204	96	.946	.421
The F tests should be used only for descriptive purposes because the clusters have been chosen to maximize the differences among cases in different clusters. The observed significance levels are not corrected for this and thus cannot be interpreted as tests of the hypothesis that the cluster means are equal.						

Table-6: Number of Cases in each Cluster

Cluster	1	14.000
	2	6.000
	3	60.000
	4	20.000
Valid		100.000
Missing		.000

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