

Tetra Pak

# Magazine

Theme: Deeper in the Pyramid

No.

104

2015





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Thank you in advance for sharing your suggestions with us.

*Julie Trolley, Editor*

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## Content No. 104



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**A**t a time when production and distribution were far from reliable, Dr Ruben Rausing founded Tetra Pak and introduced a revolutionary way to package and make milk available in a safe and efficient manner. His innovation filled an important need in post war Europe and success was immediate. Ever since then we have continuously developed and improved his concept.

Today our equipment is found across the globe and every year food and drink in our packages reach billions of consumers. Our solutions include numerous innovations in food processing, packaging and distribution, all with our goal in mind: to make food safe and available, everywhere.

Available and affordable food is critical, not least to the two billion people found "*Deeper in the Pyramid*" – a category of consumers with a spending power of between Euro 1.80 and Euro 7.20 per day. Their priority is to build the foundations for a good future for them and their children. This means focusing on health, education, nutritious food, clean water, shelter, reliable transport and communications. They represent an important category and offer many business opportunities.

Our starting point is that when food is processed and packaged well, it can be handled, transported and made available to consumers everywhere in a safe, efficient and affordable way.

In this edition of the Tetra Pak Magazine, we look closely at the opportunities the consumers "*Deeper in the Pyramid*" offer. We highlight examples of companies in other industries and examine the business models they are using to leverage this exciting opportunity. We also present some of the many ways in which Tetra Pak is helping customers meet the needs of low-income consumers around the world with nutritious, safe, quality packaged food and beverages. ■

**Note!** The "bottom of the pyramid" as described by C.K. Prahalad considers those people with an income of less than US\$2 per person per day whilst the concept *Deeper in the Pyramid* (DiP), that Tetra Pak focuses on, considers the category of consumers with a disposable income of between US\$2 and US\$8 (Euro 1.80 and Euro 7.20) per person, per day.



# The growth markets of the future will be found *‘Deeper in the Pyramid’*



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*Since Noor Ali set up Rehmat, a tiny grocery store or ‘kirana’ in the old Indian town of Ahmedabad, nearly a decade ago, he has sold more branded goods every year. Strip after strip of sachets containing shampoo, Vaseline, washing powder, hair dye, Vicks balm, face cream — just about everything you’d find in a chemist’s in Europe — dangle around the window through which he serves his customers.*

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The sums of money involved are tiny. A sachet of Pond's skin moisturiser sells for just two Indian rupees (Euro 0.03) and Ali gets only a slim margin, but he's happy with the change.

"A shampoo bottle costs at least sixty Indian rupees (Euro 0.85). A teenage girl cannot buy that, but she can definitely buy a sachet worth one rupee," he points out. "Small packs allow people to afford international brands, so consumers who were not using cosmetics like Fair and Lovely face cream, or shampoo, are now buying it, which is increasing our profits."

A large proportion of Ali's customers earn between Euro 1.80 and Euro 7.20 a day, putting them firmly in the Deeper in the Pyramid (DiP) consumer category that the Boston Consulting Group has identified as the "golden opportunity" for international companies.

#### HOW AN UPSTART COMPETITOR FOUND UNILEVER A NEW MARKET

That the population of Ahmedabad, one of the world's fastest growing cities, should be largely in the DiP category is perhaps not surprising. Tetra Pak has modelled its DiP concept on the ground-breaking 2002 paper 'The Fortune at the Bottom of the Pyramid', by the Indian economist C.K. Prahalad. According to this paper, it was a company based in Ahmedabad that forced multinationals to take DiP consumers seriously.

As Prahalad's paper explains, Nirma, a start-up detergent company based only a few kilometres from Ali's shop, in 1995 forced Unilever to completely rewrite its production and marketing strategy for India. Nirma had ousted Unilever's Surf brand as India's best-selling detergent by offering a much more basic product at a fifth of the price. Unilever responded with its own basic detergent, Wheel, which could, like Nirma washing powder, be produced cheaply at small plants close to the consumer and had a formulation better suited to hand-washing clothes in river water.



A shampoo bottle costs at least sixty Indian rupees (Euro 0.85). A teenage girl cannot buy that, but she can definitely buy a sachet worth one rupee.

The aim was to fend off a competitor. But as Unilever developed new distribution channels to reach Wheel's target lower income consumer, it discovered an entirely new market segment. As Unilever adapted other brands, for instance selling Sunsilk shampoo in sachets, profits from its Indian subsidiary soared, growing an average of 25% per year for the next five years. In his paper published in 2002, Prahalad encouraged businesses to learn from Unilever's experience and stop dismissing "the developing world" as potential consumers. Instead, he argued they represented an untapped "multi-trillion dollar market".



## THE WORLD HAS CHANGED

The Swedish professor and statistician Hans Rosling advocates a similar shift in perspective. There is no longer an “enormous gap” between “the West” and “the Developing World”, Rosling asserted during a talk in 2010. “The world has changed, and it's overdue to upgrade that mind set and taxonomy of the world,” he said. “These lower or middle income countries, the emerging income countries, they will...forge forwards economically.”

According to Devangshu Dutta, head of Indian retail consultancy Third Eyesight, consumer goods companies such as Unilever and Colgate-Palmolive have had success reaching DiP consumers with their wares sold in the warung stores of Indonesia and the favelas of Brazil as well as kirana stores like Ali's, but they are still far from saturating the market. Unilever, he points out, admitted in 2012 that its distribution network only reached about a fifth of India's 638,000 villages directly.

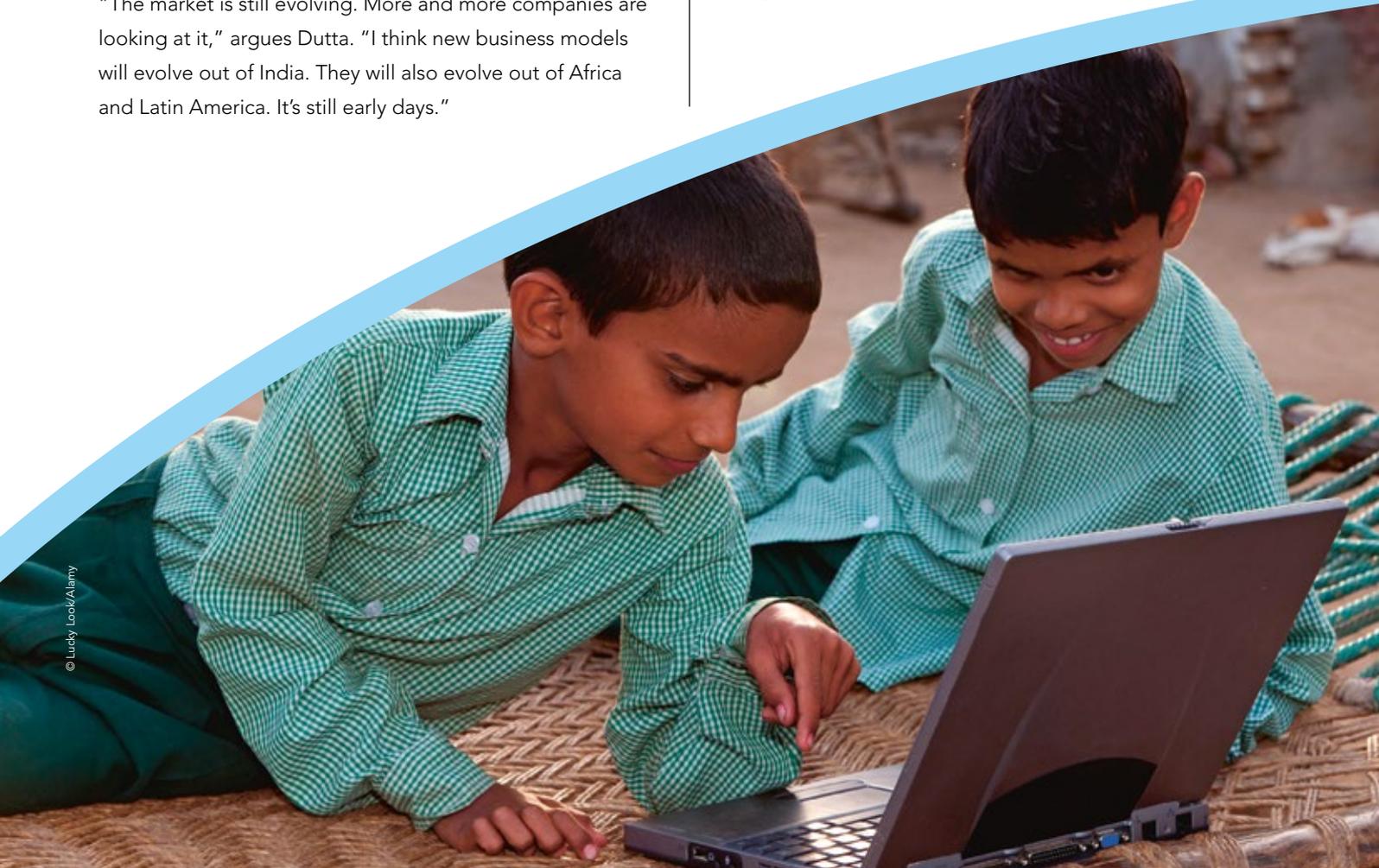
“The market is still evolving. More and more companies are looking at it,” argues Dutta. “I think new business models will evolve out of India. They will also evolve out of Africa and Latin America. It's still early days.”

From Africa, the most famous example of a service tailored for DiP consumers is M-Pesa, a branchless banking and money transfer service using mobile phones. The service was launched in Kenya in 2007 by Vodafone's Safaricom subsidiary, and then rolled out to India in 2011, and to Egypt in 2013, while being imitated by almost all of Vodafone's competitors.

## TAKING DiP BEYOND SOAP AND SHAMPOO SACHETS

The biggest shift since Prahalad's study in 2002 is the number of DiP consumers who have access to the Internet. In early 2015, Microsoft unveiled the Nokia 215, a smart phone selling for just Euro 26, which could potentially put the Internet in the hands of hundreds of millions of new consumers.

This could lead to a new financial services infrastructure growing up around mobile phones, stimulating DiP consumers to leap directly from using cash to using ‘mobile wallets’ and phone payments. Many of these consumers will never own a debit, credit or ATM card.





© Lucky Look/Alamy

Mobile recharging services is a business sector where DiP markets are generating excitement.

**AS DiP SHRINKS, THE MIDDLE CLASS GROWS**

The proportion of the world's population classified as DiP is projected to shrink from 33% in 2015 to 28% by the end of the decade, according to research by Boston Consulting Group. Given that this is the case, why is this segment of such interest to the future of business?

The answer is simple. By connecting with consumers and supporting them while they are in this lower income group, businesses become better equipped to supply to them as their incomes increase.

"It's an important market because incomes are rising and, if you can hook customers to your brand early on, you can rise up with that customer," explains Dutta. "People are seeing it as a 20 to 25 year relationship."

At some point in the not-too-distant future, Noor Ali will find he is hanging fewer rather than more strips of branded sachets from his shop window every year. His customers will be able to afford goods in the larger, more convenient packaging that is common in the United States and Europe. Companies that are finding ways to reach consumers on limited incomes today are gaining a head start and winning the loyalty of tomorrow's middle class. ■



# The geography of DiP consumers



*The economies in countries like Brazil, India, China and Indonesia are expanding. As incomes rise, poverty is falling. Between 2000 and 2010, the number of people living in extreme poverty around the world was cut in half; five years ahead of the goal set by the United Nations. As a result, access to health and education is improving and purchasing power is growing, putting consumer goods in reach, for the first time, of millions of low-income households.*

**93**  
million people  
in Latin America

**130**  
million people  
in Russia and Eastern Europe

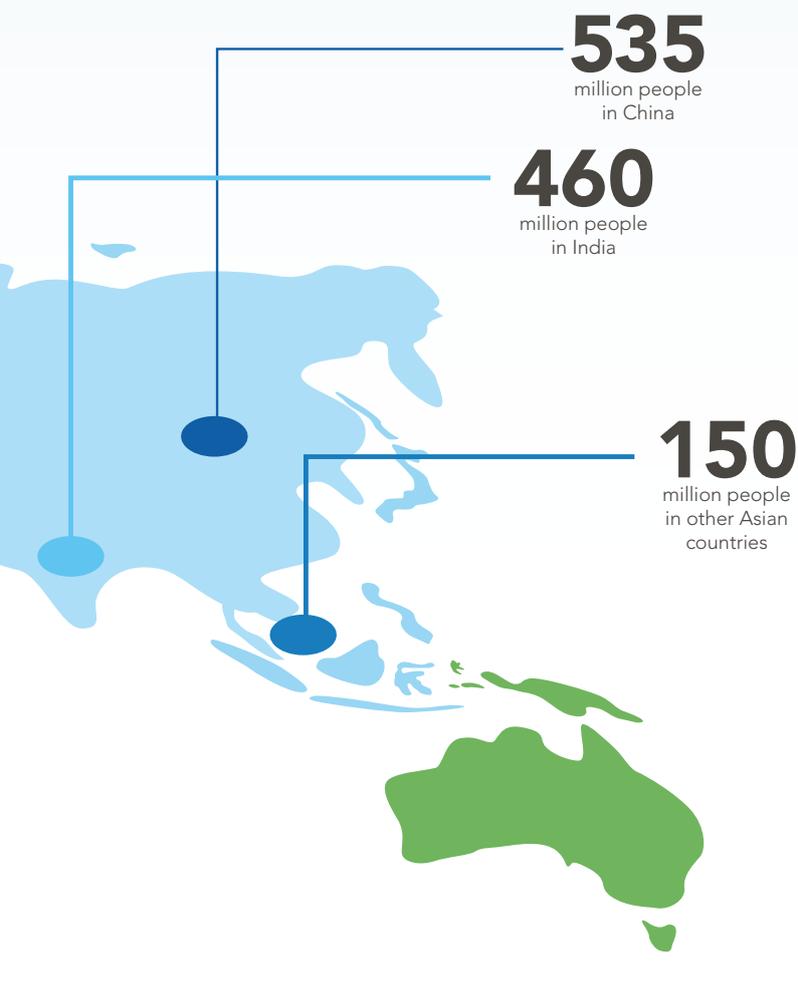
**249**  
million people  
in Sub-Saharan Africa



## WHERE ARE THE WORLD'S DiP CONSUMERS TO BE FOUND?

The vast majority of DiP consumers are in Asia, with about half living in India and China alone. As many as 535 million people live on between Euro 1.80 and Euro 7.20 a day in China, 460 million people in India, and 150 million in other Asian countries.

Although many Africans also remain trapped at the bottom of the pyramid, Sub-Saharan Africa is the next biggest DiP market, with some 249 million consumers. There are another 130 million in Russia and Eastern Europe, and 93 million in Latin America.



For the dairy industry, Indonesia, Brazil, Pakistan and Kenya rank alongside India and China as the most attractive markets. Together they represent about 76% of DiP consumption of liquid dairy products. Mexico, Russia, Thailand, the Philippines and Egypt are also significant markets according to World Bank.

## POPULATION SIZE IS NOT THE WHOLE STORY

The number of inhabitants in a country is not necessarily an indicator of the sales potential. Note the differences, for example, among the dairy consumption figures in DiP markets. China has the largest population of any country, and DiP consumers represent approximately 35% of the total (estimated as 1.36 billion 2015). In spite of their numbers, Chinese consumers only drink around 33 litres of milk per capita per year. Indians, by contrast, consume almost 80 litres per capita per year. So, despite its somewhat smaller population of about 1.25 billion, in terms of total volume India is a significantly larger market, consuming more than double the volume of milk consumed in China.

**"The vast majority of DiP consumers are in Asia, and live on between €1.80 and €7.20 a day"**



Extending distribution channels and services into the low-income districts of a city where your business is already well established is comparatively easy.

### EXPOSURE TO GLOBAL BRANDS

Another major difference stems from whether the DiP population is richer or poorer than the country's average. In India and Africa, where the majority of the population are at the bottom of the pyramid, DiP consumers are likely to have had far less exposure to international brands than their counterparts in Russia or Latin America. In the latter two, those earning less than Euro 1.80 a day are part of a poorer minority, so they will have long been exposed to global brands, even if they have not been able to afford them.

### REACHING DiP CONSUMERS – RURAL OR URBAN?

The mix of urban and rural consumers also makes a difference. Some 70% of India's population lives in villages, many with poor road connections. About a third of China's low-income consumers are also rural, according to the World Bank.

The low-income populations in Brazil, Mexico and Indonesia, on the other hand, are largely urban with 85, 82 and 74% living in cities, respectively. Selling to rural customers represents a logistical challenge which even companies long established in these markets are only now starting to solve. Extending distribution channels and services into the low-income districts of a city where your business is already well established is comparatively easy.

### GROWTH EXPECTATIONS ARE PARAMOUNT

The most significant determinant of the attractiveness of DiP markets is growth expectations. The world's population living on a daily income above Euro 7.20 is expected to rise from 52% in 2011 to 66% by 2020, bringing an extra 1,5 billion people into the middle-income section. How this will be divided between countries remains uncertain, however.



Workers head home after a day of working in tea fields in Kericho, Kenya.



In India, per capita income growth averaged just 1.3% from the 1950s right up until the economic liberalisation of the 1990s. Now, India is competing with China for the title of the world's fastest growing major economy. In the last three months of 2014, the country posted an impressive 7.5% in economic growth, overtaking even the 7.3% reported by China in the period.

Sub-Saharan Africa is also growing fast, with GDP up 4.7% in 2013. Kenya in particular is projected to enjoy fast growth, with its economy set to expand between 6 and 7% every year up until 2017. Elsewhere, however, the picture is less rosy. According to the World Bank, Brazil grew at a comparatively sluggish 2.5% in 2013, and Russia at an even more downbeat 1.3%.

**"Now, India is competing with China for the title of the world's fastest growing major economy."**

#### **NEW THINKING FOR NEW CONSUMERS**

Businesses that pay close attention to who and where the world's DiP consumers are today are already well aware of the challenges they face. Finding new ways of operating is increasingly important, as the race among multinational companies gathers momentum. ■



Low income consumers are taking 39% of the global market in liquid dairy consumption.

# Who are the world's DiP consumers?



*The world's 1,5 billion 'Low income consumers', classed by the World Bank as those earning between Euro 2.60 and Euro 7.35 per capita a day, represent nearly one third of the entire global market, spending a total of Euro 2,6 trillion every year.*

In the food and beverage sector, low income consumers represent the single biggest segment of the market, worth Euro 1,13 billion in 2010. If you narrow that down to dairy alone their share is bigger still, taking a full 39% of the global market in liquid dairy consumption. Tetra Pak refers to this category of consumers as 'Deeper in the Pyramid', and defines it as people with between Euro 1.80 and Euro 7.20 to spend daily.

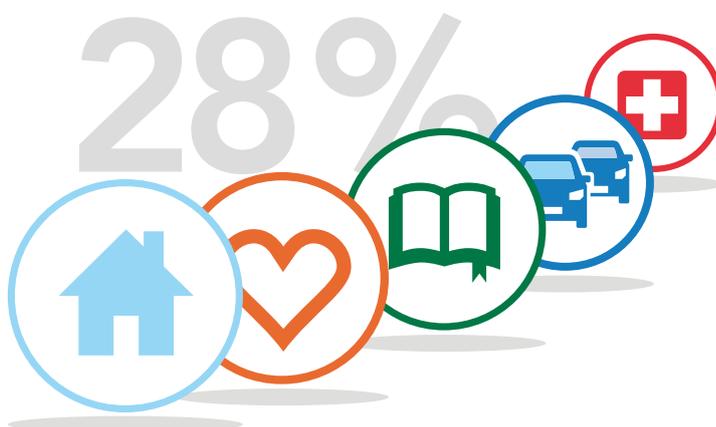
Whichever definition you use, the message is clear. Companies need to find ways to tailor their products to these consumers. Those who succeed will not only open up a lucrative new market segment, they will also be helping hundreds of millions of people live better lives.

## WHAT ARE THEY BUYING?

As DiP consumers' disposable income grows and more companies target them specifically, they will only grow in importance. According to 'The Next Billions: Unleashing

business potential in untapped markets', by the Boston Consulting Group, they already have a surprisingly large combined discretionary income.

While food and drink remain the biggest expense for DiP consumers, they spend 28% of their income on "other necessities", such as housing, health, education, fuel, transport and medicines, and have 32% remaining for non-essentials such as consumer goods, communications and entertainment.



Based on our research around the world, Tetra Pak has developed some typical DiP personas – in an effort to give these two billion consumers an identity and help us understand their reality:



## Nicaragua

**Name:** Rosa **Age:** 65

### Family situation

Lives with her four children and eight grandchildren.

### Occupation

General household chores including minding grandchildren and preparing family meals.

### Shopping habits

Buys household food from Pulperias (traditional Nicaraguan stores) almost daily. Milk is bought in bulk and used for drinking and cooking. Rosa prefers to buy raw milk from local vendors and distributors as she feels it is purer and contains more calcium.

### Aspirations

To watch her grandchildren grow into strong, healthy, educated adults and help make their dreams come true. Rosa also hopes to get more help with housework as she gets older and her strength deteriorates.



## Kenya

**Name:** Florence **Age:** 35

### Family situation

Lives with her sister and two children. Separated.

### Occupation

Omena fish trader.

### Shopping habits

Florence commonly shops for fish, meat and vegetables at the market, local stores and kiosks. She also likes to browse in the local mall.

### Aspirations

To grow her business in order to afford the rent and put food on the table (currently the adults occasionally give up one of their own meals in order to ensure her children get the food they need) and for her children to be healthy and educated. She would also like to be able to afford personal items such as a mobile phone, nice clothing and make-up.





# Egypt

**Name:** Elham **Age:** 20



## Family situation

Lives in a 60 m<sup>2</sup> apartment with her husband, who is a government employee, and their two children.

## Occupation

Nursery teacher.

## Shopping habits

Elham shops at the grocery shop and local mini market that she has been dealing with for years. She cooks vegetables, pasta or rice and salads every day and chicken or other meat once or twice a week.

## Aspirations

Her priority is her two children, their health, well-being and education. She is pushing her husband, Shawky, to find a higher-paying job in the private sector or an afternoon shift to raise the family's standard of living.



# India

**Name:** Naduni **Age:** 30



## Family situation

Married with one child.

## Occupation

Teacher. Studying for an MA.

## Shopping habits

Naduni visits the local supermarket and Kirana a few times a week to buy household items such as food and granulated coffee.

## Aspirations

Naduni is career driven and feels working is an important way for women to gain knowledge. She wants the best for her child and is encouraging her to learn English so that she can one day forge a career for herself as a white-collar worker.



# Check list!

The nature of DiP consumers varies between countries and regions in ways which are significant for companies trying to reach them. In fact, one of the biggest mistakes global companies can make is to assume that the same strategies will work everywhere. Here are a few pointers:

## CHALLENGE

- 
1. Cash flow
  2. Distinguishing needs and wants
  3. Scattered sales and distribution
  4. Unreliable suppliers
  5. Underdeveloped business ecosystems
  6. Social benefit

## DON'T



Assume regular spending patterns. DiP consumers typically live in uncertainty, have little capital and are paid sporadically.

Rely on costly marketing. An example: Procter & Gamble's PUR water purification system didn't sell conventionally, now it's a social enterprise.

Think two billion consumers are easy to reach. DiP consumers are often rural and remote so contact is difficult.

Take quality for granted. Access to high-quality inputs, training and credit is tricky for small DiP suppliers.

Assume getting what you need — information, repairs or maintenance — is easy.

Rush! Building trust among DiP consumers takes time.

## DO



Sell low cost products in small quantities, minimise high up-front payments and focus on affordable quality.



Focus on real needs. Mobile phone financial services such as M-Pesa transfers money at 33% of the cost of traditional companies.



Build a dedicated market channel. Team up with partners for market reach such as Hindustan Unilever's Shakti project. (Hindustan Unilever is the Indian subsidiary of Unilever PLC).



Engage, train and partner with suppliers, like Schneider Electric's BipBop programme.



Engage and enable your suppliers. Try using IT and mobile apps to develop the business ecosystem like Esoko.



Demonstrate that commercial returns enhance community development for all.



Studio Oia Lager



© Lucky Look/Alamy

Long before the modern food industry, milk was carried in goat skin and wine was preserved in clay pots.

# The quest to preserve food and drink



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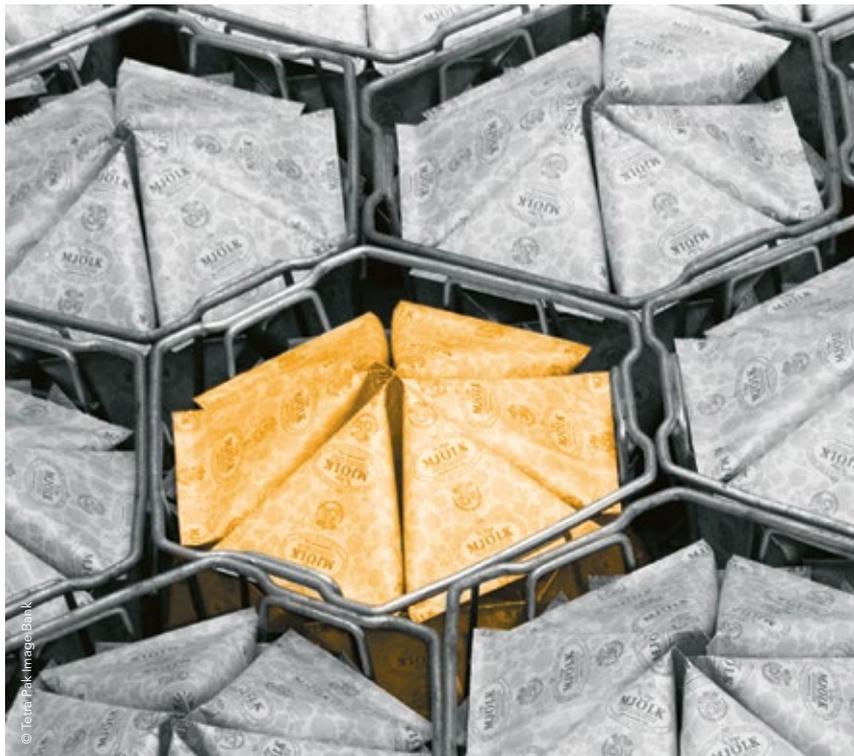
*Tetra Pak pioneered the development of aseptic packaging in the 1960s. It was described by The Institute of Food Technologists as ‘the greatest food innovation of the twentieth century’. Although this specific technique is a relatively modern invention, the idea of preserving food to prevent spoilage, to get through periods of scarcity, or to facilitate transport, is thousands of years old.*

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The quest to preserve food has also led to the discovery of exciting flavours, adding new dimensions to the world’s cuisines. Here we look at some of the traditional ways in which people around the world historically, and still today, protect what’s good.

## THE POWER OF THE SUN

Dehydration is one of the oldest preservation methods, used since prehistoric times. By evaporating moisture, dehydration inhibits the growth of microorganisms that need water to thrive. North American Indians, for example, used the sun’s rays to dry slices of meat, the Chinese dried eggs and the Japanese dried fish and rice.



Tetra Pak pioneered the development of aseptic packaging in the 1960s.



Long before the modern food industry brought powdered milk to the masses, Genghis Khan and his invading hordes carried dehydrated milk on their journeys. The Mongols are credited with developing a method of boiling, skimming, and drying milk liquids in the sun to extend the shelf life and the portability of this highly nutritious substance.

### THE SALT OF THE EARTH

Salting foods was another popular preservation method. Increasing the salinity of organic matter prevents pathogens from growing, ensuring that it is free of contaminants as well as imparting a deliciously savoury tang.

Salt-pickled foods are believed to have originated in India and the Orient, after which they were introduced to the Western world through trade routes. Indian pickles, called

*achaar*, are commonly made from mango and lime, but can also be made from exotic ingredients such as rose petals, jackfruit, lotus stem, and purple yam. The Chinese pickled everything - vegetables, meat, fruit, and nuts - and in fact, some foods, such as plums, were only consumed after being pickled.

Russia's proximity to Asia, coupled with a relatively short growing season and harsh winters, bred a passion for pickling - or *solenie* (sol is the Russian word for salt). Peasants had to find a way to make cabbage, mushrooms and cucumbers last the winter, and pickling them in a salt solution was the answer.



© Shutterstock

Kimchi was crucial in enabling Koreans to consume enough vegetables during the long winters.

## Fermentation — a process in which food is allowed to “go bad” under controlled conditions.

### CURDLED, SPOILED, AND SOURED

One of the most versatile methods of preserving food is also one of the most counterintuitive. Fermentation - a process in which food is allowed to “go bad” under controlled conditions - originated in the Neolithic age, and can be used to prolong the lifespan of meat, dairy, grains, legumes, vegetables and fruit.

Some of the world’s most popular foods are created this way, including yoghurt, cheese, chocolate, bread, coffee, soy sauce, *tempeh* (or *natto*), ketchup, and miso. Fermented foods and beverages can make up as much of 40% of a person’s overall diet, depending on their culture.

The accidental discovery of yoghurt dates back to the third millennium BC. Goat herders discovered that milk transported in sheepskin bags turned into a tart, creamy solid:

the bacteria in the animal skin set off the fermentation process. The word “yoghurt” actually derives from an ancient Turkish word meaning curdled or coagulated.

In Brazil, indigenous groups fermented the yuca or cassava to transform it from a bitter and poisonous root into a versatile flour with a mellow, nutty flavour called *farinha*. The harvest had to be soaked, ground, pressed, and toasted by hand in a time-consuming, multi-step process that brought the whole village together. Today, *farinha* still forms the basis of many favourite dishes, including a deep-fried version that is described as “Brazil’s answer to French fries.”

And no list of fermented foods would be complete without *kimchi*, the crunchy, spicy, pungent fermented-and-pickled vegetable whose invention may date back as far as 1,000 BC. Kimchi was crucial in enabling Koreans to consume



The aseptic technology makes a huge difference to the everyday lives of low-income consumers.



enough vegetables during the long winters, but today, even with fresh vegetables available year-round, kimchi remains a hugely popular food. It's estimated that Koreans continue to eat 18 kg of this spicy-sour condiment per person per year, choosing from more than 180 different varieties available.

#### **ASEPTIC TECHNOLOGY TAKES FOOD A STEP FURTHER**

By creating an aseptic environment where harmful bacteria are eliminated, Tetra Pak has created a processing and packaging standard that keeps food fresh, tasty, appealing and nutritious for up to a year without the need for preservatives or refrigeration.

This technology already makes a huge difference to the everyday lives of consumers, regardless of their income, who might not otherwise have access to milk or other dairy products. It also helps organisations deliver food cost-

effectively during a natural disaster such as an earthquake, flood, or draught — with no refrigeration required.

The aseptic approach is as good for the planet as it is for consumers, since it reduces food waste and eliminates the energy required to control temperatures during transportation and storage. These cost and environmental efficiencies help producers reduce their carbon footprint while becoming increasingly competitive.

Today, approximately two-thirds of Tetra Pak packages sold worldwide are aseptic, and the demand is set to grow as new consumers acquire the means to purchase packaged goods for the first time. ■

Approximately two-thirds of Tetra Pak® packages sold worldwide are aseptic.

# WHAT ARE THE KEY SUCCESS FACTORS?

What should you think about when developing products to meet the needs of people who have so much less purchasing power than their counterparts in the industrialised world?

The 3A's — short for **availability**, **affordability** and **attractiveness** — have been defined as the key success factors in reaching and appealing to low income consumers. They provide a useful checklist for food and beverage manufacturers venturing into DiP territory.

## ① Availability

- functioning distribution
- government permits and licenses
- practical merchandising

## ② Affordability

- priced within the consumers' ability to buy
- especially mothers
- superior value

## ③ Attractiveness

- offering nutritious contents
- quality
- convenience & aspirational value
- environmentally and socially responsible manner

## Availability

**First**, obvious as it may sound, the product must be easily available to the DiP consumer. Achieving this means setting up functioning distribution logistics, getting government permits and licenses, and offering practical merchandising solutions to retailers.



## Affordability

**Second**, the product must be priced within the consumers' ability to buy it. And consumers — especially parents buying food for their children — must experience superior value for money. It's got to be within range *and* worth it.

## Attractiveness

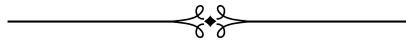
**Third**, the product must be attractive. This is not just about visual appearance. It's also about offering nutritious contents, quality, convenience and aspirational value — in an environmentally and socially responsible manner. Quite simply, does it *motivate* a purchase?





Farmers receive SMS messages to co-ordinate crop spraying.

# Sustainability, and the importance of a whole ecosystem approach



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*Engaging Deeper in the Pyramid involves more than just reducing cost or focusing on ‘frugal innovation’. Products and services need to be not just available, affordable and attractive, but also sustainable and relevant to local cultural and economic contexts.*

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To work, all the parts of the puzzle must come together, creating a whole ecosystem approach. Commercial activity that benefits the entire value chain helps grow a sustainable business where everyone plays a part. And with strong, deep roots, economic success throughout the economic cycle is more likely.

*Some examples of ventures that successfully address the issues are:*

## **IT: SUPPORTING THE FARMING ECOSYSTEM**

Mobile phones are fast becoming essential tools for entrepreneurs emerging from poverty. Esoko is an IT pioneer, providing a mobile platform in eleven African countries. Esoko apps provide local weather information, giving farmers a better chance to plant and harvest their crops at optimum times and therefore increasing their value. The apps also offer intelligence on the latest crop prices — a great support tool

Patrimonio Hoy, a subsidiary of Mexican cement manufacturer Cemex, sells home improvement packages.



Project Shakti is a rural village distribution initiative.

for farmers negotiating good prices at market. Bobo-Dioulasso in western Burkina Faso is in the heart of the mango-growing region. Here, Esoko technology was used to help prevent insects from attacking crops. SMS messages were sent to farmers in the area to co-ordinate the spraying of ripening mangoes. By working together through mobile technology, farmers were able to cut crop losses by 3,000 metric tonnes and increase the length of the growing season.

#### **SHAKTI: SOLVING THE DISTRIBUTION CHALLENGE IN INDIA**

Starting with 17 women in one Indian State, project Shakti is a rural village distribution initiative. The project expands the sales reach of Hindustan Unilever while creating livelihood opportunities for underprivileged rural women. Today, over 65,000 Shakti entrepreneurs, or 'Ammas', earn around 1,000 Indian rupees (Euro 13) per month, distributing in over 165,000 villages to some four million rural households.

Unilever plans to increase the number of Shakti entrepreneurs recruited, and trained globally from 45,000 in 2010 to 75,000 by end of 2015.

#### **PATRIMONIO HOY: TAILORED, LOW-RISK SOLUTIONS**

You might expect DiP customers to seek low-cost above all else, but the experience of successful businesses working Deeper in the Pyramid shows that smart, low-risk solutions trump rock-bottom prices. Patrimonio Hoy, a subsidiary of Mexican cement manufacturer Cemex, sells home improvement packages. Customers are willing to pay a 26% premium over the cost of building materials for complementary services. This 'membership fee' protects them from price rises, includes architectural advice, flexible delivery to avoid theft of building materials and manageable weekly payments. It's working: in the Net Promoter Score Patrimonio Hoy uses to track customer satisfaction, the company scored a remarkable 90% average in 2011.



The bank, owned by its borrowers with loans made on trust.



**GRAMEEN BANK: CONTRACT-FREE MICROCREDIT**

Access to credit is an important catalyst for economic inclusion, but it’s a service that people on very low incomes have often been denied. Grameen Bank, the pioneering and most famous example of a microcredit lender, turned conventional lending strategy on its head by proving that the unbanked are an excellent business prospect rather than a lost cause, as many had assumed.

Founded in 1983 in Bangladesh, in 2013 Grameen Bank made 7,38 million loans without collateral, helping over 6,74 million borrowers, 97% of who were women. The bank, owned by its borrowers with loans made on trust rather than contract and focused on the most needy, boasts a 98% loan repayment rate — higher than the 96% average for a US bank.

**GERES POWERFUL BELOW-THE-LINE MARKETING**

Billboards, radio and TV ads may raise product and service awareness, but in the Pyramid they’re unlikely to translate into sales. Instead, a below-the-line focus like village-level demonstrations is a marketing must for reaching consumers in the DiP segment. Iwan Baskoro, Technical Manager of Group for the Environment, Renewable Energy and Solidarity (GERES) Improved Cook Stove programme in Cambodia, which oversaw the distribution of over 1,8 million stoves, explains: “After three marketing campaigns on TV and radio with only average results, we understood that word-of-mouth was a more important information source in our target consumers’ purchase decision.” Seeking endorsement from village chiefs and offering free trials to opinion leaders also proved good ways to persuade conservative locals to try a new product or service.



Village-level demonstrations is a marketing must for reaching DiP customers.

### LEARNING FROM EACH OTHER

While new business ideas are transforming emerging economies, it is interesting to note that the lessons can sometimes be applied in mature markets too. Convinced that 'frugal engineering' can exceed consumer expectations, Renault-Nissan launched its low-cost, multi-award winning Dacia Logan at around Euro 6,000 in 2004. Its global success saw annual sales rise from 23,000 to 430,000 cars in 2013.

Similarly, Dutch electronics firm Philips applied its focus on emerging market consumer needs broadly, to discover that over-engineered technology can be intimidating for many. They therefore set out to simplify products and deliver more value. ■

**"We understood that word-of-mouth was a more important information source in our target consumers' purchase decision"**



# Working together for DiP



*In the food and beverage industry, we are exploring innovative business models, and forming alliances with public and private organisations to meet DiP consumer needs.*

## FOOD FOR DEVELOPMENT

Tetra Pak's Food for Development Office (FfDO) conducts a range of activities designed to serve DiP customers and consumers, enabling further penetration into the emerging markets. For example, as part of our School Milk Programme

we worked in public-private partnership with the Ecuadorian Government to develop an innovative, nutritious drink - milk with the popular local cereal quinoa. The drink is distributed to schoolchildren, making milk a regular part of their diet.

### **Milk with quinoa**

*Combining milk and quinoa (a high-protein, grain like seed) might not sound like an obvious recipe for success, but in Ecuador, where it is distributed daily to schoolchildren, it's a hit. What's more, this innovative, nutritious drink makes milk a regular part of the children's diet. Tetra Pak collaborated with the Government to develop this new milk with quinoa product. The initiative was part of our School Milk Programme.*





## Fortified UHT yoghurt in Ecuador

Tetra Pak's Food for Development Office and the Global Alliance of Improved Nutrition (GAIN) partnership addresses infant malnutrition with a nutritious, low-cost product.



Tetra Pak's Food for Development Office and GAIN evaluated the possibility of utilising Tetra Pak® aseptic packages to help address the high rates of malnutrition in Ecuador.

At the same time, Tetra Pak's customer Reybanpac, part of the Favorita Group, was looking for a nutritious product to help reduce malnutrition among low-income families and especially infants aged from 6 to 24 months.

Research conducted into the target market showed that 80% of mothers gave their children yoghurt as a complement to breast milk. They spent an average of Euro 2.20 per child each week on yoghurt, and over half (52%) preferred single serving packages.

In December 2013, Reybanpac launched a product called Lenutrit. This low-sugar UHT yoghurt is made with milk and whey, and fortified with vitamins and minerals. It is packed in Tetra Classic® Aseptic 110 ml packages, a safe affordable carton package that matches the product and the target group's needs.

### Our cooperation has led to positive results for local consumers:

- ☑ Thanks to financial support from GAIN and the International Finance Corporation (IFC), it was possible to bring the new product to low-income consumers in an affordable package.
- ☑ Even DiP consumers can afford Lenutrit, which has a target price of around Euro 0.17.
- ☑ Lenutrit comes in vanilla, strawberry and peach flavours. So, besides having a clear nutritional value, it is also very appealing to consumers.
- ☑ It is readily available through a huge network of local corner shops and drug stores.



## White cheese in Egypt

Revitalisation of a traditional product category in DiP markets

White cheese is not a new product. Indeed, varieties of white cheese are a traditional component of many regional diets in Southern Europe, North Africa and the Middle East.

Traditionally, white cheese has been sold loose, with no guarantee of hygiene. Now, as volumes grow, loose cheese is increasingly being converted into packaged products.

With 45 Tetra Pak® filling machines running at 11 different customer sites, Egypt is currently leading the trend in packaging white cheese in aseptic cartons. The product is a staple in Egyptian households, where 49% of the population are classified as DiP consumers (around 40 million people).



## Dairy Hubs in Bangladesh

Driving the change from farming for survival to commercial milk production in Bangladesh.

Our Dairy Hubs around the world help boost milk production and stimulate efficiency and knowledge exchange throughout the value chain. With the creation of the Chatmohar Dairy Hub in Bangladesh, daily milk production per cow rose from 4.5 litres to over 10 litres and income more than doubled from October 2010 to December 2013, generating a better milk supply and more business for our customers.



- Tetra Pak's Food for Development Office has developed the Dairy Hub concept to help customers in emerging markets access more and better locally produced milk. Together with PRAN Dairy Ltd in Bangladesh a first Dairy Hub project was established in Pabna in 2010, and another in Natore in 2011. Besides collecting and testing the milk, these hubs also provide training and run a demonstration farm that supports PRAN's own Dairy Academy, sharing knowledge and best practices. Both hubs are now yielding positive results throughout the value chain.
- The average income for small holder farmers has increased by 137% over the last four years.
- The average daily milk yield per cow has risen from 4.5 litres to more than 10 litres over the last four years.
- There has been a five-fold increase in the number of farmers moving from producing milk for family consumption to commercial milk production as a source of income, thus securing a steady supply of quality milk.
- Low-income consumers have access to affordable, nutritious, locally produced milk.

### As a fast growing product category, white cheese provides interesting business opportunities for other DiP markets:

- Packaged in Tetra Pak® cartons, white cheese is an affordable and safe source of protein for DiP consumers.
- The products have a long shelf life and can be stored easily without refrigeration.
- Producers can formulate their recipes to reduce costs by e.g. using vegetable oil instead of butter fat.
- Offering white cheese in smaller size packages is proving a successful strategy in Egypt, and opens up the market to more consumers.
- Consumption increases indicate excellent business potential, not only in Egypt but also the Maghreb, Turkey and other countries.





# Innovating to reach deeper into the pyramid



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*Aseptic processing and packaging innovations from Tetra Pak have already benefitted billions, bringing nutritious, vitamin-rich milk and juice-based products to children and families all year-round in places without reliable refrigeration, modern logistics routes, or sanitary food-preparation facilities.*

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Still, there are numerous additional innovations – in areas such as package size, merchandising and pricing – that are now helping our customers reach deeper into the pyramid than ever before.

### AFFORDABLE PACKAGES FOR AFFORDABLE PRODUCTS

We continually strive to design new, more affordable packages that bring the same product protection benefits to Deeper in the Pyramid consumers as those enjoyed by their higher income counterparts. How do we do that?

One way is to reduce the package size. Delivering small portion packages, from 65 ml to 200 ml, provides contents in quantities that people need at a particular moment, and can more likely afford to buy. Small versions of the Tetra Classic® Aseptic, the original tetrahedron cut from long cylinders of packaging material with no folds and negligible material waste, can meet this challenge.

Another example is Tetra Wedge® Aseptic, which reduces volumes and materials by replacing the flat top of the Tetra Brik® Aseptic with a wedge-shaped top. This package has the additional advantage of a broad consumer-facing surface, which makes a great billboard for innovative graphics and on-pack promotions.

A third example is the Tetra Fino® Aseptic package – a pillow or pouch made with the lowest weight paperboard to ensure product protection and survive rough handling in the distribution chain, at the lowest possible cost.

Tetra Fino Aseptic has long been contributing to the gradual conversion of loose milk to hygienic packaged milk in markets like India and Bangladesh. This change brings a wealth of advantages including a reduction in the health risks associated with viruses, bacteria and parasite contamination such as Escherichia coli (E. coli), Campylobacter and Salmonella.







### LOOSE MILK CONVERSION

Our Loose Milk Conversion Initiative, which began in Turkey in 2000, promotes the consumption of milk in safe packages instead of re-used bottles or plastic bags, which are often contaminated. It helps raise awareness about food hygiene and nutrition and, at the same time, increases milk consumption. Over the last 15 years, the programme has been expanded to Iran, Egypt, Morocco and Pakistan.

### DISTRIBUTION AND DISPLAY

Another area of innovation involves the growing variety of attractive, functional and space-saving merchandising configurations that many consumer brands have adapted to DiP markets. For example, Tetra Classic Aseptic and Tetra Fino Aseptic packages can be distributed in chains. These and shelf-replacing dispenser boxes, trays, racks, and stands make it possible to display products in tiny stalls and kiosks, overcoming the lack of shelf space.

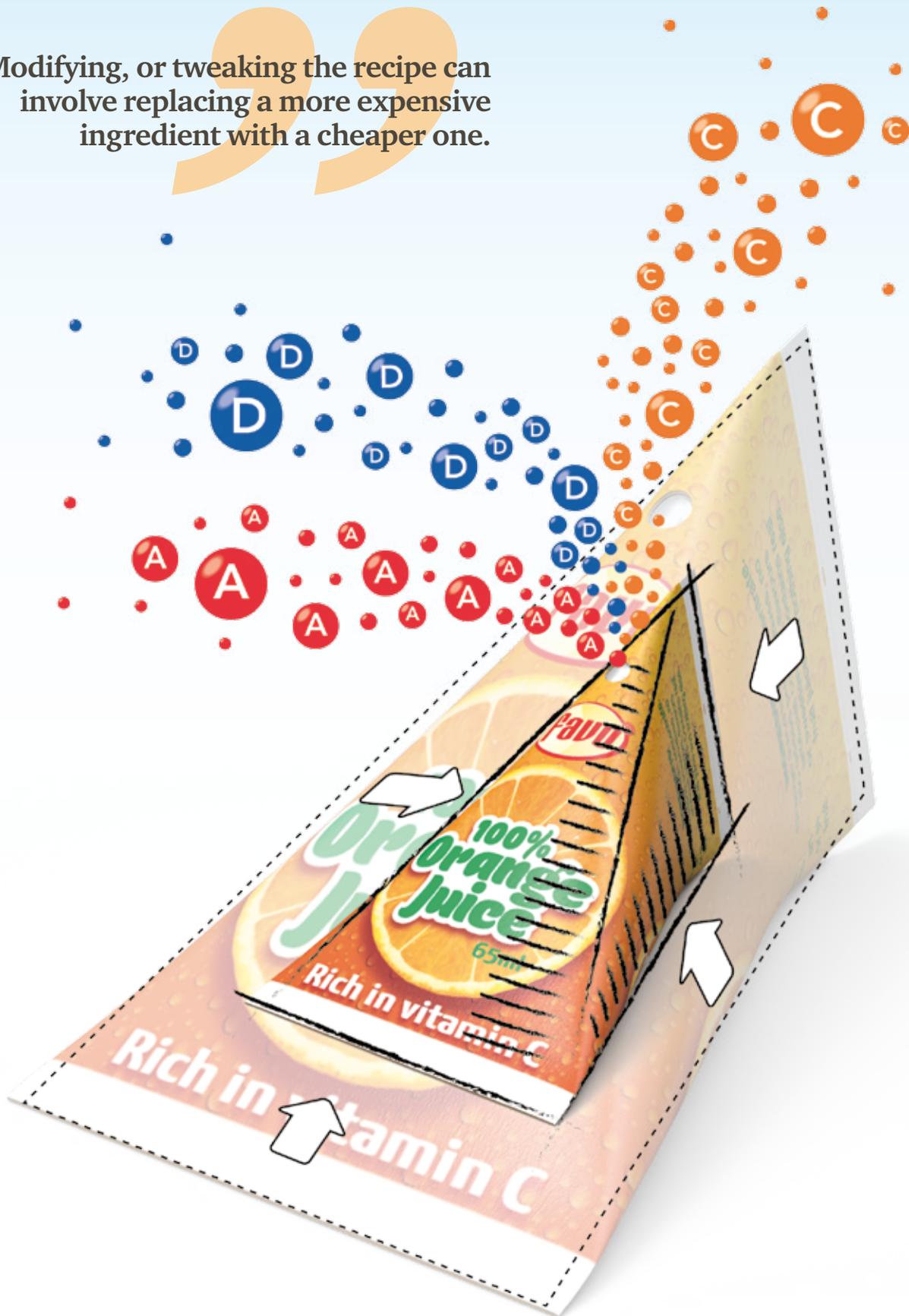
Another type of secondary packaging – large translucent plastic jars – makes it possible to transport and display products while keeping them safe from dust, insects and other pests.

As eye-catching and clever as these configurations may be, they also have to hold up well when subjected to hot, humid storage conditions, and long transport stretches on an open backed truck, bicycle, motorbike, tuk-tuk or boat.

**Tetra Classic® Aseptic and  
Tetra Fino® Aseptic packages  
can be distributed in chains.**



Modifying, or tweaking the recipe can involve replacing a more expensive ingredient with a cheaper one.





### THE MAGICAL ONE-COIN PRICE POINT

In almost every country, there is a small coin or a note that practically everybody carries in their pockets. It's ready cash. The average person can justify spending it on a drink or snack. Staying at the one-coin price point is essential for many brands. If the cost of the package plus the content, along with a necessary product margin, exceed this one-coin price point, the brand can't compete. It will either become too expensive or unprofitable.

The question is, how can it be done? Tetra Pak offers a range of tried and tested techniques: Optimizing, recipe-tweaking and reducing customer system costs.

**Optimizing** refers to inexpensive, relatively simple machine kits from Tetra Pak that actually reduce the size of packages. This method has been used in gradually cycling Tetra Fino® Aseptic from 100 ml down to 70 ml, or from 250 ml to 220 ml. Vietnamese, Indonesian and Indian customers have all used Optimizing successfully.

Two other techniques are **modifying** the recipe and **reducing** system costs. Modifying, or tweaking the recipe can involve replacing a more expensive ingredient with a cheaper one. Reducing system costs usually entails engineering efforts that, for example, reduce electricity consumption or increase production speed.

### VALUE CHAIN SERVICES

Flexibility, agility, knowledge about specific markets, and the long view are all needed when sustaining a product's value chain along the rugged pathways into DiP markets. With our growing knowledge in this field, Tetra Pak is in a position to help product brands develop the right strategies. We invite our customers to take advantage of our Value Chain Services to help figure out new ways of serving the DiP markets by addressing the challenges of lower purchasing power, a lack of electricity and refrigeration, or an under-developed retail sector. ■



People on low incomes will, in time, migrate towards a more middle-class

# Co-innovation speeds up time to market



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*There are strong incentives today for food and beverage manufacturers to tailor products for the very specific needs of lower income consumer groups.*

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First, there are many such groups! Second, safe, high-quality food for this sector of society is still in short supply. And third, many of those currently on low incomes will, in time, migrate towards a more middle-class lifestyle, when consumption will grow and established brand loyalties will play a strong role in steering preference. For manufacturers, therefore, focusing on lower income groups today is as much about securing long-term opportunity, as it is about addressing near-term need.



## lifestyle

### NO ROOM FOR COPY/PASTE

Experience has shown that food marketers cannot simply copy existing products, packaging, and distribution methods from the developed world and paste them onto the lower income markets. There are many reasons for this, from climates and infrastructure to resource availability and levels of income. Different approaches are needed, therefore, to address this new consumer category, now euphemistically referred to as Deeper in the Pyramid (DiP). Products for DiP consumers must be based on the cultures, lifestyles, conditions and aspirations of this specific segment of society, which vary considerably from country to country and region to region!

### FOCUS ON LOW-PRICE, HIGH-VALUE INGREDIENTS

A key consideration is price point — delivering a product that meets the consumer's value expectations for an amount they are both willing and able to pay. Different companies achieve this in different ways. For some, reducing the quantity of product inside a package, or offering smaller package sizes, are a relatively swift means to achieving that goal.



## Focusing on lower income groups today is as much about securing long-term opportunity.

For others, the focus is on reducing the cost of the product's formulation, finding alternatives to more expensive ingredients that allow them to deliver comparable taste, texture and quality at a lower price. While a third, and increasingly widespread approach, is to fortify products, for example with vitamins, to enhance its value without adding significantly to the cost.



## Mango drinks

**Mango-flavoured drinks** are popular all over the tropics, (the countries that lie between the Tropic of Cancer and the Tropic of Capricorn), where the climate is favourable to mango growing and where many DiP consumers live. To support the need for low price point, several brands, including Parle Agro Foods, Frooti mango drink are sold in Tetra Classic® Aseptic 90 ml chains, a string of eight packages that can be hung in the windows and on the walls of small street stands and kiosks. Merchandising comes easy for customers as these chains don't take any counter space but still get high visibility and, as they are perforated, consumers can simply tear off a single package to buy.



## Lactic acid drinks

Lactic acid drinks (LAD) form a whole category of drinks that are ideally suited to the DiP market. These drinks are normally made from a mixture of a dairy source, sugar and acidulant. Flavouring and stabilisers are then added to create fun, refreshing drinks. LAD has been growing in popularity with DiP consumers in China and Korea over the past seven to eight years and is on the rise in Vietnam, the Philippines and Indonesia too. "Now, people who couldn't afford milk at all have a kind of milk they can afford, a tangible sign of progress for aspiring global consumers." Says David Cheng of Tetra Pak's Product Development Centre in Singapore.





# A brighter future for *four million people*

Emerging markets are the new growth frontier. By 2030, the World Bank expects 70% of global economic growth to be in developing regions like Africa and Asia and investment in these areas will have tripled.

With a projected population growth of 1,1 billion, enterprises that successfully meet the needs of those with growing incomes will thrive as new consumers rise up the socio-economic pyramid. By 2030, the emerging middle classes with over Euro 9 per day to spend are expected to swell to over four billion from some two billion today.

At Tetra Pak, we're excited to be part of the innovative new ventures currently transforming these markets — through new packaging formats and modular equipment, to new distribution solutions and filled products. Meeting the needs of customers, retailers and consumers in tomorrow's biggest markets also creates a brighter future for our industry. ■

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### Mixed Sources

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