

SHOULD KELLOGG'S LAUNCH GLUTEN-FREE PRODUCTS IN INDIA?¹

Sandeep Puri, Mayank Rawat, Arjit Rawal and Akshay Nangia wrote this case solely to provide material for class discussion. The authors do not intend to illustrate either effective or ineffective handling of a managerial situation. The authors may have disguised certain names and other identifying information to protect confidentiality.

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Going gluten free was a real game changer. My life has changed because I now eat the right foods for my body.²

Novak Djokovic
World No. 2 Tennis player³

Djokovic's statement on the gluten-free diet garnered significant press across the world and brought to the fore the gluten-free fad, which had been endorsed by many other celebrities. Though the benefits of a gluten-free diet were debatable,⁴ its introduction came as a boon for those with celiac disease who had suffered silently for decades from the drastic consequences of gluten intolerance. Since 2010, the celiac diet had become a fad among health conscious people. Similar fads had added new dimensions to the food and beverage industry under the "Good-for-you" or "Better-for-you" product tags.

Kellogg's India had pioneered healthy and nutritional products and always successfully capitalized on the gaps in the market by introducing the right products at the right time. Now, with a gluten-free diet increasing in popularity in markets abroad, industry observers wanted to know whether fulfilling the demands of the gluten-free diet market could be Kellogg's next big Indian opportunity. Should Kellogg's introduce gluten-free Corn Flakes? Should it introduce the product only for celiac disease sufferers or as a healthy variant of the regular Corn Flakes?

COMPANY BACKGROUND

In 2013, Kellogg's was the world's leading producer of convenience foods. It had operations in over 180 countries and thrived because of a 1500-product strong portfolio.⁵ Always committed to nutrition, Kellogg's focus on its products and processes⁶ helped the company's net sales to increase by 4.2 per cent to \$14.8 billion⁷ in 2013.⁸

Established by W. K. Kellogg and John Harvey Kellogg in 1906, Kellogg's,⁹ with headquarters in Michigan, United States, began by offering packaged flaked cereals.¹⁰ In 1915, Kellogg's introduced Bran Flakes, the first high-fibre cereal,¹¹ and Kellogg's Raisin Bran, a whole grain cereal in the United States.¹²

Since its inception, Kellogg's followed its vision of nourishing its consumers with the best quality foods at all times. During the Great Depression, it surprised everyone with its aggressive promotional campaigns.¹³ During the Second World War, Kellogg's supported the U.S. army by providing it packaged K-rations.¹⁴ In the 1970s, Kellogg published its nutrition policy and became the first cereal company to voluntarily list the sugar content on its products.¹⁵ Kellogg's flourished through skilful marketing and by creating and sustaining a highly valuable brand name.

KELLOGG'S INDIA

Kellogg's Entry

In the mid-90s, Kellogg's turned its focus to developing markets, such as China and India. The per capita consumption of breakfast cereals in India was around two kilograms per annum compared to five kilograms per annum worldwide.¹⁶ In 1994, Kellogg's invested \$30 million¹⁷ to establish a technologically advanced facility in Mumbai, India, and within a year, it launched Corn Flakes, Wheat Flakes and Basmati Flakes in the Indian market.¹⁸ These products did not take off, despite aggressive media campaigns.

Kellogg's then conducted a study that found that the average Indian family did not have breakfast regularly, compared to their Western counterparts.¹⁹ With this key insight in mind, Kellogg's CEO Denis Avrongsart asserted that Kellogg's India did not intend to change Indians' breakfast eating habits but instead wanted to offer consumers around the world a healthy, nutritious, convenient and easy-to-prepare alternative.²⁰

Kellogg's also realized that Indians boiled their milk and liked it warm. Adding hot milk to Corn Flakes made the cereal soggy and taste bad, but adding cold milk was not an option because sugar did not dissolve in cold milk and Indians liked their milk sweet.

Product pricing also affected Kellogg's launch. Price-sensitive Indian consumers overlooked Kellogg's higher-priced products, which they considered as a premium.²¹ This problem was exacerbated because Kellogg's had positioned Corn Flakes as a health product, which was a pitch that seemed to target the affluent or upper-class customers.

Cereal Killer

The initial hiccups notwithstanding, Kellogg's decided to replicate its global success by customizing the products for its Indian consumers.²² Within a year, Kellogg's launched Chocos (September 1996) and Frosties (April 1997) in India.²³ Chocos were flakes coated with chocolate and Frosties were flakes coated with sugar frosting. To Kellogg's surprise, these products caught on, and people consumed them not only with milk but also as snacks. Indian consumers greatly appreciated the sweet taste and crispy texture of these products, and sales picked up significantly. This even encouraged Kellogg's to launch Chocos Biscuits in India.

Chocos and Frosties marked the beginning of Kellogg's success in India. Since then, Kellogg's had had an amazing run in the Indian market. In August 1998, it launched the Mazza series of Corn Flakes in three Indian flavours.²⁴ Mazza was packed in pouches, which brought down prices substantially. This helped Kellogg's to reposition itself as a healthy, tasty and fun-filled brand. Worldwide, Kellogg's has had

immense success across a wide portfolio of product categories, such as cookies, crackers, toaster pastries and frozen waffles. In India, however, it was only in the breakfast cereals market.

Kellogg's realized that to establish itself in the Indian market, it had to focus on cost-reduction measures and continuously increase its reach. To reduce costs, Kellogg's localized its packaging and raw material requirement. To widen its reach, Kellogg's sacrificed glossy packaging to reduce prices, and it established storage hubs in all key Indian states, hiring around 18 carrying and forwarding agents who served 200 distributors across India.²⁵

Further, to cater to the mass consumer segment, Kellogg's introduced different packaging sizes to suit the consumption patterns and purchasing power of Indian consumers. In 2007, the company introduced the K-pak range of products available in pouches for INR10.²⁶ It also launched a new range of Corn Flakes fortified with iron and calcium to address the local needs of Indian consumers (see Exhibit 1). Since 2011, Kellogg's had expanded its portfolio into areas such as oats, but had to contend with competition from new (Britannia, Marico) and existing companies (PepsiCo, Bagrry's) because of the nearly 25 per cent annual growth the category had been witnessing.²⁷ In 2013, when other multinational companies struggled to achieve a single-digit growth rate, Kellogg's India grew by 31 per cent and crossed the sales mark of INR5 billion.²⁸

PROMOTIONAL STRATEGY

Innovative marketing and brand building played an important role in Kellogg's success. Challenges, including price sensitivity and lack of awareness, had been the prime focus of the company in designing its marketing campaigns. Anupam Dutta, Kellogg's India managing director, said, "Low price points help us reach the Tier II and III towns. We launched Chocos K-pak in Tamil Nadu first and then rolled it out nationally."²⁹ Kellogg's used a whole range of media, including the press, posters, radio, television, billboards and the Internet, for advertising. However, television was the main channel for its advertising. Kellogg's signed several Indian actresses, including Karisma Kapoor³⁰ (for Chocos), Lara Dutta³¹ (for Special K), Juhi Chawla³² (for Chocos) and Sakshi Tanwar³³ (for Corn Flakes), to promote its products. Half of the money allocated for advertisement was spent on promotions and the other half on thematic promotions. The slogans "Jago Jaise Bhi, lo Kellogg's hi"³⁴ ("Wake up and Enjoy Kellogg's Foods") and "Naye saal ke shuruat, lo Kellogg's se he" ("Start your New Year with Kellogg's") were used to promote Kellogg's products in the Indian market. Listing nutritional facts, other benefits of Corn Flakes and other Kellogg's products on the packaging were further means of communication that Kellogg's used (see Exhibit 2).

The company took the social route to reach its consumer base by maintaining active cooperation with opinion leaders, government and independent agencies to promote the nutritional diet on various platforms. It also enhanced its brand image by working with schools and non-government organizations (NGOs) on social causes. Kellogg's also partnered with the Indian Dietetic Association (IDA) to raise awareness about iron deficiency problems, such as anaemia.³⁵ It conducted a series of workshops focused on the prevention and cure of anaemia across various metro cities for individuals and families. It also launched the Kellogg's Breakfast Week campaign in Chennai, Delhi and Mumbai to generate awareness about the importance of breakfast. Iron Shakti (iron energy) was launched in 1999³⁶ to further the success of the campaign. Adding regional words to the product created a local appeal. Kellogg's also introduced Mazza in three different local flavours — mango-elaichi, rose and coconut — and introduced 60 gram pouch packs to target the mass segment. This localized marketing technique of iron-fortified Corn Flakes created a "connect" with consumers in the health segment. In 2011, Kellogg's rebranded Chocos by

including whole grains in its ingredients and promoting this addition. Although initially the products targeted the mass market, later the aim shifted to specific groups (see Exhibit 1).

INDIAN FOOD AND BEVERAGES MARKET

Growing at a rapid pace of 18 per cent, India's food and beverage industry in 2013 was pegged at approximately US\$40.3 billion and was expected to reach \$66.3 billion in the next five years.³⁷ The industry's scorching growth pace became a magnet for many multinational players as it provided huge investment opportunities in the areas of canning, dairy and food processing, specialty processing, packaging frozen food, and thermo processing.³⁸

One food and beverage segment specifically targeted consumers with an affinity towards nutritional products and introduced "Good-For-You" and "Better-For-You" products. Good-For-You products provided specific functional benefits such as high fibre or extra calcium and the Better-For-You ones met specific nutritional standards.³⁹

Consumers warmed up to and embraced the benefits of the more hygienic packaged foods over the loosely sold kind. Because of this packaged product preference, the Indian package industry saw a compounded annual growth rate (CAGR) of 15.6 per cent from financial year 2007 to 2013.⁴⁰ The ready-to-eat (RTE) segment accounted for 90 per cent of the packaged food industry.⁴¹

Global consumer analyst at Mintel, Peter Ayton, predicted that consumer expenditure in India would grow by 13 per cent each for the next three years (2013-16) and thought that the cereal market (at 40 per cent RTE adult cold cereal, 20 per cent RTE children's cold cereal and 40 per cent children's hot cereal) would play a large part in this growth.⁴² He thought that cereals epitomized the growth potential in India after its shift to packaged foods and that packaged breakfast cereals were an interesting sector in the country because they were replacing cooked, traditional Indian breakfast besides replacing non-packaged items.⁴³ The size of the Indian breakfast cereal market had doubled over the past six years and was estimated to be \$139 million for 2012.⁴⁴

COMPETITION FOR KELLOGG'S INDIA

The growing size of the Indian breakfast market attracted the attention of various players. Kellogg's faced stiff competition from Murginns, Mohan Meakin, MTR, Britannia and Marico as well as traditional food items. Every company launched new products with customer-centric innovations to get a piece of this lucrative market.

Murginns

In 2007, the INR2 billion Khemka Group entered this segment with the launch of three breakfast cereals under the brand name Murginns.⁴⁵ The company's strategy was to challenge the market leader, Kellogg's, with its aggressive pricing. Murginns sold its 475 gram Corn Flakes packet at a price of INR95, compared to Kellogg's INR125 per packet. According to Murginns, affordability was the main driver in the breakfast cereals market.⁴⁶ Thus, it aimed for a price 30 per cent lower than Kellogg's. Some of Murginns' products included Instant Wheat Porridge, Corn Flakes Natural Honey, Wheat Bran Flakes, Muesli Fruits, Muesli Crunchy Nuts, Choko Cups, Choko Poko and Honey Rings.⁴⁷

Bagrry's

Established in 1990, Bagrry's became a leading brand of high-fibre health foods in India because of its commitment to providing highly nutritious breakfast products. It manufactured and marketed a wide range of high-fibre breakfast cereals and health foods. Its brands included White Oats, Jumbo Oats and Oats Flour, along with a variety of muesli and bran cereals. Bagrry's also supplied its products in bulk to multinationals and other leading companies, such as SmithKline Beecham Consumer Healthcare, Britannia Industries, Cookie Man Foods, Herbalife International, Hindustan Unilever, ITC and many muesli manufacturers.⁴⁸ Over the years, the company had diversified its product range by launching different product extensions. Bagrry's planned to generate revenues of INR 900 million by 2015.⁴⁹

Mohan Meakin

Mohan Meakin was among the oldest and only real Indian player in the Indian breakfast market. The company positioned its products in the lower end of the cereal segment. In 2009, R. N. Kohli, deputy manager at Mohan Meakin, said that Mohan's was an INR500 million brand with an 80 per cent share of the non-premium market.⁵⁰ Mohan's benefitted from Kellogg's aggressive campaigns in India because it led to the overall growth of the breakfast market. Mohan's major product was Mohun's New Life Corn Flakes, which was fortified with three vitamins essential for growth, normal digestion and healthy skin and vision. Its other breakfast products included Mohun's Wheat Porridge, Mohun's Wheat Flakes and Mohun's Wheat Dalia.⁵¹

Marico

Marico entered the breakfast cereal market in 2010 with the launch of Saffola Oats⁵². This was an extension of its vegetable oil brand, Saffola. In 2012, the oats market segment had grown at a rate of around 40 per cent over the previous few years.⁵³ In 2012, Marico ranked second in the oats market, with a market share of 14 per cent.⁵⁴ Its product was promoted as 100 per cent natural whole grain oats, which helped reduce cholesterol and keep the heart strong, and it catered to the health conscious consumer segment.⁵⁵

PepsiCo

PepsiCo launched Quaker Oats in the Indian market in 2005.⁵⁶ PepsiCo was the market leader in the oats segment, with a market share of approximately 35 per cent.⁵⁷ In 2012, the oats segment was 28 per cent of the INR7 billion breakfast cereal market in India.⁵⁸ PepsiCo marketed the brand innovatively with its "Smart Heart Challenge" and named its website Goodmorningheart.com.⁵⁹

Nestlé

Nestlé entered the Indian breakfast cereal market in 2010 in collaboration with General Mills. The company planned to reduce the sugar content of 20 of its products in the breakfast segment by 2015 to make them highly nutritious.⁶⁰ Major brands owned by the company included Nestlé Cheerio's, Nestlé Shreddies, Nestlé Shredded Wheat, Nestlé Oats and others. A special green banner across the top of Nestlé product boxes denoted that whole grains were the main ingredient in all of its recipes.⁶¹ The company reported revenues of INR83,655.6 million between 2012 and 2013.⁶²

GLUTEN AND CELIAC DISEASE

Gluten has been defined as follows:

The mixture of proteins, including gliadins and glutelins, found in wheat grains, which are not soluble in water and which give wheat dough its elastic texture and any of the prolamins found in cereal grains, especially the prolamins in wheat, rye, barley, and possibly oats, that cause digestive disorders such as celiac disease.⁶³

People with severe auto-immune reaction to gluten are believed to suffer from celiac disease. In this condition, they have antibodies against gliadin that cause inflammation in their intestines, which results in bloating, diarrhoea, nausea and other symptoms. For some people, even a small amount of gluten can trigger severe consequences, which means that celiac sufferers must follow a gluten-free diet to manage their condition.⁶⁴ A study in Derbyshire, United Kingdom, estimated that the rate of celiac disease among the white population was around 1:356, whereas the same in the Asian population was around 1:193,⁶⁵ which meant that more Asians had this affliction. The first case of celiac disease in India was reported in 1966.⁶⁶ A report by the Departments of Gastroenterology and Human Nutrition estimated that the prevalence of celiac disease in the north Indian community was 1 in 96 and concluded that the disease was more common in India than was recognized.⁶⁷

With six to eight million Indians estimated to have had the disease, celiac disease verged on being a public health problem. The reality was that despite so many being afflicted, the disease was underdiagnosed, and the India had minimal resources to address this.⁶⁸

Gluten-Free Diet

The Codex Alimentarius Commission of the World Health Organization (Geneva, Switzerland) and the Food and Agricultural Organization (Rome, Italy) described gluten-free foods as follows:

Dietary foods a) consisting of or made only from one or more ingredients which do not contain wheat (i.e., all *Triticum* species, such as durum wheat, spelt and kamut), rye, barley, oats or their crossbred varieties, and the gluten level does not exceed 20 mg/kg in total, based on the food as sold or distributed to the consumer, and/or b) consisting of one or more ingredients from wheat (i.e., all *Triticum* species, such as durum wheat, spelt and kamut), rye, barley, oats or their crossbred varieties, which have been specially processed to remove gluten, and the gluten level does not exceed 20 mg/kg in total, based on the food as sold or distributed to the consumer.⁶⁹

The discovery and later introduction of gluten-free products came as a boon to those with celiac disease and offered additional benefits, such as a low-calorie diet. Although many studies have debated the viability of non-celiac sufferers forgoing gluten, much-touted benefits such as a flat stomach, increased focus, weight loss, an enhanced immune system, a sharp memory and increased athletic performance led to the mass acceptance of gluten-free products among the health conscious community worldwide, leading to a huge surge in the demand of gluten-free products. In the U.S. market alone, customers considered gluten-free products as a healthy alternative, which caused *TIME Magazine* to place the gluten-free movement second in its top 10 list of food trends in 2012,⁷⁰ by which time Domino's, Dunkin' Donuts and even Chelsea Clinton had added gluten-free products to their menu. It has been estimated that the sale of gluten-free products will reach \$6 billion by 2018 globally.⁷¹

Gluten and Indian Food

In northern India, where the prevalence of celiac disease was higher than in the rest of India, wheat was the staple cereal and roti, paranthas, puris (different types of flat breads), etc., made of wheat flour, were integral parts of the meal; therefore, the north Indian diet contained approximately 25 to 30 grams of gluten per day. In southern and northeastern India, rice-based foods were more integral to the diet. Further, malabsorption among Indian celiac sufferers who were poor, already had low nutritional status and were ignorant about their situation aggravated the effects of celiac disease.⁷²

An early 2013 study on the gluten-free diet and the perceptions and concerns of people living with celiac disease in India concluded that it was difficult to manage a gluten-free diet in India. It was observed that gluten-free products, though needed in India, had become available of late, but their gluten-free claims were not checked. The study also found that gluten-free cookies and flour were the most-purchased gluten-free items.⁷³ A late 2013 study on the challenges faced by Indian celiac sufferers in the adaptation of a gluten-free diet also noted that there were several barriers to managing such a diet in India, including inadequate information and education about celiac disease, food contamination, and inadequate/no food labeling on the packaged food items. Both studies stressed the need for the availability of reliable gluten-free options in the markets, along with trained nutritionists, proper dietary guidance and the presence of support groups.⁷⁴

GLUTEN-FREE COMPETITORS

The products available in this segment were limited to traditional tastes. Some companies explored the advantages that the increased awareness of gluten-free products brought and some even began supplying such products in the market.

Savoureux Foods

Savoureux Foods was set up in 2011 to provide products to gluten-allergic consumers.⁷⁵ Its vision was to become market leader in health foods and the gluten-free segment in India through customer service and continuous innovation.⁷⁶ Its product line contained cakes, muffins, pizza crust, maida (plain flour), bread, daliya (pounded wheat), etc.⁷⁷ The company reported a turnover of around INR5 million.⁷⁸

Kalpana Udyog

Kalpana Udyog was founded by Kalpana Garg with the objective to develop healthy, safe and affordable food products for those on restricted diets, especially those with celiac disease.⁷⁹ Its product line included Celiac Flour, Celiac Salted Biscuits, Celiac Sweet Biscuits, Celiac Daliya and Celiac Laddu, with more gluten-free products, such as gluten-free cake and malpua (sweet pancakes), in the pipeline.⁸⁰

Sai Food Products India (SFPI)

SFPI, an Indian company, was launched with the vision of ensuring the availability of affordable products to gluten-allergic and wheat-allergic consumers.⁸¹ It was involved in creating awareness of gluten-free products among doctors. The SFPI's product line contained traditional Indian foods such as flour, besan

(gram flour), daliya (pounded wheat), biscuits and snacks, including noodles, chips and pasta.⁸² In 2013, the company's turnover was around INR10 million.⁸³

INDIAN CONSUMERS' EVOLVING PREFERENCES

In 2013, India had the youngest population in the world, with a median age of 25 years.⁸⁴ A study by McKinsey Global Institute showed that aggregate consumer spending could more than quadruple, eventually reaching INR70 trillion by 2025.⁸⁵ Globalization and rapid economic growth in India over the last two decades had encouraged fundamental changes among the country's young consumers. According to analysts, India's population had moved towards a Western-style consumer-spending pattern,⁸⁶ with a special affinity to products that promoted a healthy lifestyle.

The increased prosperity of the growing working population and its changing lifestyle transformed the dietary habits of Indians, and the younger generation in India became more health conscious. According to Gaurav Gupta, senior director at Deloitte Touche Tohmatsu India Pvt. Ltd., the sale of products perceived as healthy, such as organic products, wheat corn flakes, baked and non-fried potato chips and diet beverages, were on the rise in India.⁸⁷ Consumers' attraction to nutritious products laid down the path for the emerging breakfast cereal market in India. Many opportunities were available as millions of new buyers tried to improve their lifestyles and buy products to feel healthier.

CONCLUSION

A PricewaterhouseCoopers-Federation of Indian Chambers of Commerce and Industry (PWC-FICCI) report stated that nutrition foods, beverages and supplements constituted INR14.5 to 15 billion of the Indian market and that this segment was growing at a CAGR of 10 to 12 per cent.⁸⁸ It suggested that awareness-generating mechanisms, when combined with the force of this growing market, could bring a paradigm shift to the growing India food and beverages market.

Kellogg's had led the breakfast cereal market thus far, and launching gluten-free products could give it the first-mover advantage in the corn flakes category. Considering the high cost and time involved in diversifying the portfolio, should Kellogg's launch its Gluten-Free Corn Flakes in India? What should its strategy be? Should it launch Gluten-Free Corn Flakes as an extension of its current product line or as a new brand? Should it launch the product in the current breakfast cereal market? Or should it launch the product for the niche celiac sufferers market?

EXHIBIT 1: KELLOGG'S PRODUCT RANGE IN INDIA

Launch Year	Product	Characteristics	Variants
1995	Corn Flakes	Made from real natural corn, fortified with iron and eight essential vitamins	Original, Real Honey, Real Strawberry Puree, Real Almond and Honey, Real Mango Puree, Real Banana Puree and Chips
1996	Chocos	Tasty chocolaty breakfast cereal for kids made with whole grains	Smacks, Duet, Moons and Stars
2007	All Bran	Made from 100% whole grain and fortified with eight essential vitamins and iron	
2008	Special K	Honey-coated flakes of wheat that are 98% fat-free	
2008	Oats Bites	Offers the goodness of oats flour, wheat flour, corn flour and wheat bran, essential vitamins and minerals and is also high in fibre	
2008	Extra Muesli	Helps provide required fibre, vitamins and iron.	No Added Sugar, Nuts Delight, Fruit Magic, Crunchy Fruit & Nut
2009	Honey Loops	Made from multi-grains consisting of wheat, corn and barley, providing a combination of essential nutrients, vitamins and minerals	
2010	Heart to Heart	Made of natural oats, it is rich in a soluble fibre called beta-glucan. Beta-glucan blocks the reabsorption of cholesterol and brings down LDL	

Source: Compiled by the authors.

EXHIBIT 2: ENERGY CONTENT OF DIFFERENT KELLOGG'S PRODUCTS

	Kellogg's Honey Loops	Special K	All Bran Wheat Flakes	Kellogg's Heart to Heart Oats	Kellogg's Oat Bites	Kellogg's Corn Flakes	Kellogg's Chocos	Kellogg's Muesli
Energy	148 kcal	142 kcal	212 kcal	124 kcal	184 kcal	147 kcal	146 kcal	181 kcal
Energy from Fat	4 kcal	5 kcal	9 kcal	28 kcal	14 kcal	4 kcal	8 kcal	19 kcal
Total Fat	0.4 g	0.5 g	0.9 g	3.2 g	1.6 g	0.4 g	0.9 g	2.1 g
Saturated Fatty Acids	0.2 g	0.2 g	0.3 g	0.6 g	0.4 g	0.2 g	0.5 g	0.3 g
Monounsaturated Fatty Acids	0.1 g	0.1 g	0.1 g	1.5 g	0.6 g	0.1 g	0.3 g	1.2 g
Polyunsaturated Fatty Acids	0.2 g	0.2 g	0.5 g	1.1 g	0.6 g	0.1 g	0.1 g	0.6 g
Trans Fatty Acids	0.0 g	0.0 g	0.0 g	0 g	0.0 g	0.0 g	0.0 g	0.0 g
Cholesterol	0 mg	0.0 mg	0 mg	0 mg	0.0 mg	0 mg	0.0 mg	0.0 mg
Carbohydrates	32.0 g	31.0 g	48.0 g	23.7 g	37.7 g	31.2 g	28 g	36.4 g
Sugar (Sucrose)	9.2 g	8.4 g	7.3 g	0 g	8.1 g	2.5 g	30.5 g	0.6*g
Dietary Fibre	0.6 g	2.1 g	5.0 g	3.9 g	2.4 g	0.8 g	1.5 g	2.1 g
Soluble fibre				1.7 g				
Insoluble fibre				2.2 g				
Protein	4.7 g	5.4 g	8.0 g	7.0 g	7.0 g	5.4 g	5.7 g	6.2 g
Sodium	0.2 g	0.23 g	0.8 g	0.7 g	0.20 g	0.28 g	0.14 g	0.17 g
Vitamin A	30 mg	35.4 µg	55 mg		45.4 µg	35.4 µg	35.4 µg	45.4 µg
Vitamin C	7 mg	11.1 mg	14 mg		9.2 mg	11.1 mg	7.2 mg	11.2 mg
Thiamine (Vit B1)	0.3 mg	0.3 mg	0.4 mg		0.4 mg	0.3 mg	0.3 mg	0.3 mg
Riboflavin(Vit B2)	0.4 mg	0.3 mg	0.4 mg		0.5 mg	0.4 mg	0.4 mg	0.4 mg
Niacin (Vit B3)	4.1 mg	4.2 mg	5.1 mg		5.5 mg	4.2 mg	4.1 mg	4.1 mg
Vitamin B6	0.5 mg	0.5 mg	0.6 mg		0.7 mg	0.5 mg	0.5 mg	0.5 mg
Vitamin B12	0.7 mg	0.7 µg	0.7 mg		0.7 µg	0.7 µg	0.7 µg	0.7 µg
Folate	25.5 mg	25.2 µg	31.5 mg		34.0 µg	25.2 µg	25.5 µg	25.2 µg
Iron	4.4 mg		9.0 mg	0.8 mg	5.8 mg	5.5 mg	4.4 mg	5.8 mg
Calcium	180 mg			35.5 mg	196 mg		304.0 mg	
Zinc	0.75 mg			0.8 mg	1.0 mg		0.8 mg	

Source: Compiled by the authors.

ENDNOTES

- ¹ This case has been written on the basis of published sources only. Consequently, the interpretations and perspectives presented in this case are not necessarily those of Kellogg's India or any of its employees.
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