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Super Milk Products Private Ltd. (B): Extending Keventers Into the Premium-Milk Market

Swati Singh, Sudhir Naib, and Kartikeya Singh 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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The dairy industry in India is one the fastest growing segments and has been witnessing consistent growth of 6–8 per cent annually. For almost 100 years now, the Keventers brand has been synonymous with milk and with this new app-based milk delivery service, customers across Delhi/NCR [National Capital Region] will now have access to pure, unadulterated and nutritious premium milk.[[1]](#endnote-1)

Aman Arora, managing director, Super Milk Products Private Ltd.

After the successful rejuvenation of its Keventers brand of milkshakes, Super Milk Products Private Limited (Super Milk Products) decided to enter the premium-milk market. The consumption habits of Indian consumers had evolved as a result of growing environmental concerns, increasing urbanization, rising incomes, and other demographic changes. Among the new consumer preferences was a demand for higher-quality dairy products, such as premium, organic, unadulterated milk, which was, especially popular among affluent and health-conscious consumers. In 2018, premium milk constituted less than 1 per cent of the dairy market, but was expected to rise to 5 per cent by 2020.[[2]](#endnote-2)

In June 2018, Super Milk Products launched a subscription service for Keventers premium milk in the Delhi National Capital Region (NCR) based on its mobile application (app). The company hoped to capture 20 per cent of the market and become a major competitor in the premium-milk segment within one year.[[3]](#endnote-3) However, reaching that goal would not likely be easy. Premium milk was a niche, low-profile category that comprised various established small and large competitors, some that had been operating in the market since 2009.[[4]](#endnote-4) Selling premium milk raised a set of challenging questions for Super Milk Products. Was the premium-milk segment lucrative enough to warrant the investment required for its Keventers brand to enter this market? Should the company use the same strategy to enter the premium-milk segment that it used to enter the milkshake segment? How should the company best compete and position its Keventers brand in the competitive premium-milk segment as a late entrant?

THE INDIAN DAIRY SECTOR

India had become the largest global producer of milk since 1998, with the highest number of cattle in the world (see Exhibit 1). The production of milk in India had risen from 17.0 million tonnes in 1950–51 to 180.4 million tonnes in 2017–18. As a result, India’s per capita consumption of milk had increased from 130 grams per day in 1950–51 to 294 grams per day in 2017–18.[[5]](#endnote-5)

Out of the total milk production in India, about 48 per cent was either consumed at the dairy farm level or sold to producers of foods other than milk in rural areas. The remaining 52 per cent was marketable surplus, which was sold to consumers in urban markets. Of this marketable surplus, two-thirds was handled by the organized sector, which comprised dairy co-operatives and private dairies. The rest was bought by the unorganized sector[[6]](#endnote-6) (see Exhibit 2). India’s prime minister, Narendra Modi, had set a goal to double farmer’s incomes by 2022–23. Dairy provided a supplementary source of income in rural areas, so it was likely to receive support from the government.[[7]](#endnote-7)

COMPETITION IN the INDIAN DAIRY MARKET

The Indian dairy market was dominated by numerous companies. Some had only a regional presence; others covered the entire country. Among these companies, the major competitors in the Indian dairy market were Amul, Prabhat Dairy Ltd. (Prabhat), Mother Dairy Fruit & Vegetable Pvt. Ltd. (Mother Dairy), and Parag Milk Foods Ltd. (PMFL).

Amul

Gujarat Co-operative Milk Marketing Federation Ltd. marketed its products under the brand name Amul. It was the market leader in the dairy sector with a turnover of ₹290.85 billion[[8]](#endnote-8) in 2017–18.[[9]](#endnote-9) It procured more than 23 million litres of milk per day from approximately 18,700 village co-operative societies.[[10]](#endnote-10) Amul was targeting revenue of ₹650 billion by 2020, for which it was setting up manufacturing units in the states of Orissa, West Bengal, and others.[[11]](#endnote-11) The Amul model of dairy development was a three-level structure in which dairy co-operative societies existed at the village level. These societies were joined together under a milk union at the district level and a federation of milk unions at the state level.[[12]](#endnote-12) This model established a direct link between milk producers and consumers, and eliminated any intermediaries. In 2018, India had 22 major state marketing federations, which included Karnataka Milk Federation (under the brand name Nandini), Tamil Nadu Co-operative Milk Producers Federation (under the brand name Aavin), and Punjab State Cooperative Milk Federation (under the brand name Verka).[[13]](#endnote-13)

Prabhat

Maharashtra-based Prabhat was incorporated in 1998. It had a capacity for processing 1.5 million litres of milk per day and annual revenue of ₹15.54 billion in 2017–18.[[14]](#endnote-14) Prabhat was expecting to grow at a compound annual growth rate of 20 per cent from 2018 to 2020. The company had planned to open approximately 20,00,000 retail outlets across India.[[15]](#endnote-15) Similar to Amul, Prabhat also had a diversified dairy portfolio. In 2019, Tirumala Milk Products Private Limited, a wholly owned subsidiary of the French multinational dairy corporation Lactalis, acquired the dairy business of Prabhat for ₹17 billion.[[16]](#endnote-16)

Mother Dairy

Mother Dairy was originally established by the National Dairy Development Board, an initiative under Operation Flood to make India self-sufficient in milk production. Mother Dairy’s turnover for the 2017–18 financial year was ₹87 billion, with most of that revenue contributed by its dairy business, as well as its fruit, vegetables, and edible oil businesses. It sold fresh fruit, frozen fruit, and vegetables under the Safal brand, and edible oils under the Dhara brand. Mother Dairy was a major milk supplier in the Delhi NCR, with approximately 3 million litres of sales per day. In other cities such as Mumbai, Hyderabad, Kolkata, and Noida, it sold approximately 500,000 litres per day.[[17]](#endnote-17)

PMFL

Founded in 1992, PMFL was a leading manufacturer and marketer of branded dairy foods and beverages made using 100 per cent cow’s milk. The company had a diversified portfolio under the brands Gowardhan Go, Topp Up, Pride of Cows, Avvatar, Milkrich, and Slurp.[[18]](#endnote-18) PMFL had also expanded into farm-fresh premium milk in 2012, with the launch of its brand Pride of Cows, in Mumbai, Pune, and Surat.[[19]](#endnote-19) In 2019, its premium milk was available in the Delhi NCR, priced at ₹120 per litre, and it could be ordered using an app. The company airlifted the premium milk from its dairy farm in Manchar, Pune, to cater to consumers in the Delhi NCR.[[20]](#endnote-20)

EVOLVING INDIAN CUSTOMERS

India had emerged as the fastest-growing economy in the world and was expected to become the third-largest consumer economy by 2030. Its gross domestic product was worth ₹181.2 trillion in 2017 and was expected to grow at a rate of 7.3 per cent in subsequent years.[[21]](#endnote-21) India’s nominal year-on-year expenditure growth of 12 per cent was more than double the global rate of 5 per cent. The consumer market stood at ₹106.6 trillion and was expected to reach ₹278.8 trillion by 2025.[[22]](#endnote-22) India’s consumer economy was driven by a growing per capita income, which had increased from ₹29,524 in 2006–07 to ₹103,219 in 2016–17.[[23]](#endnote-23) India’s middle class was expected to increase more than 10 times, from 50 million in 2007 to 583 million by 2025.[[24]](#endnote-24) It was expected that India would transition from a bottom-of-the-pyramid economy to a truly middle-class country by 2030.[[25]](#endnote-25) The increase in per capita income had further fuelled people’s propensity to consume, which increased demand for premium-quality staples, and led to various products such as milk shifting from being a staple item to a discretionary item. In non-metropolitan cities, middle-class customers displayed a preference for value-for-money products, while reflecting aspirations that surpassed their income levels.[[26]](#endnote-26)

As the fastest-growing economy in the world, India was also moving from the traditional extended or joint family model (i.e., with aunts, uncles, grandparents, cousins, or any variation of these relatives all living in the same household) toward the nuclear family model (i.e., with only parents and children in one household), which had both improved India’s standard of living and increased consumption. For the same income level, nuclear families normally spent 20–30 per cent more than joint families. Urbanization was also on the rise. It was expected that 40 per cent of the Indian population would be living in urban areas by 2025 and would account over 60 per cent of the country’s consumption.[[27]](#endnote-27)

India had the world’s largest millennial population, which, at 440 million, constituted nearly 34 per cent of the country’s population. This consumer group was responsible for bringing changes to India’s consumer shopping behaviours and trends. Millennials formed the preferred target group for most brands in almost all consumer segments, including food, beverages, apparel, footwear, consumer durables, and automobiles. [[28]](#endnote-28)

Smart phone users and Internet penetration had also grown at a rapid pace in India. The number of smart phone users was expected to reach 829.0 million by 2022, from 404.1 million in 2017. India was quickly transitioning into a mobile-first economy, with Internet use levels expected to increase from approximately 357 million total users in 2017 to 840 million by 2022.[[29]](#endnote-29) Consumers were increasingly buying online. India was expected to surpass the United States to become the second-largest online shopping country in the world by 2034 (after China). It had the potential to reach ₹13.97 trillion by 2027, supported by rising incomes and a surge in Internet users. The number of online shoppers in India was expected to reach 220 million in 2025, from 120 million in 2018.[[30]](#endnote-30)

Indian consumers were increasingly becoming healthier and more socially conscious. Rising health issues had encouraged consumers to become more mindful of their eating habits. They carefully considered the ingredients and nutritional value of foods they consumed. Being socially conscious, consumers preferred brands that had good practices and that were trustworthy, transparent, and ethical. Changing lifestyles, higher employment rates, greater access to global trends, and higher disposable incomes were leading to changes in the consumption habits of Indian people and the addition of premium products and services across industries.[[31]](#endnote-31)

THE PREMIUM-MILK SEGMENT: the FARM-to-TABLE MOVEMENT

Over the years, a major consumer trend had slowly taken shape in India’s urban food consumption markets: the farm-to-table movement. This trend referred to consumers wanting to know the source of the food they consumed. Increasingly, consumers wanted to know the condition of the dairy farms where milk was sourced, the health of the animals, and even what the animals were fed. [[32]](#endnote-32)

A dairy company in India functioned primarily as a milk aggregator that collected milk from villages, processed the milk, and then packed it in plastic pouches before selling it to retailers. The process would include mixing various milk varieties (e.g., from different breeds of cows or mixing cow and buffalo milk). It took up to four days for the milk to reach the consumer, which compromised its freshness.[[33]](#endnote-33)

Consumers were increasingly worried about the level of adulteration or dilution of the milk, which was approximately as high as 70 per cent, according to a report released by Food and Safety Standards Authority of India in 2012. Alarmingly, the adulterants included detergents and urea. The findings of this report laid the foundation in India for higher-quality milk, which fuelled demand for premium milk that was fresh, unadulterated, and uncontaminated. Premium milk was also touted as being free from antibiotics and oxytocin, which were used to increase the cow’s yield. In Delhi, a litre of premium milk was priced at ₹60–₹100, compared with normal dairy milk at ₹36–₹40. In 2018, the premium milk segment was estimated to represent less than 1 per cent of the total dairy market, although it was expected to rise to 5 per cent by 2020.[[34]](#endnote-34) Fresh and unadulterated premium milk was available within hours of milking through various app-based delivery services. In the Delhi NCR, the major competitors in this segment included Farmery, O’leche, iOrganic, Whyte Farms, Pride of Cows, Wow Cow, Country Delight, Binsar Farms, and Keventers (see Exhibit 3).

the ROAD AHEAD

In less than five years, Keventers milkshakes had become a formidable brand. Super Milk Products was expecting a ₹1.5 billion financial turnover by the end of 2019.[[35]](#endnote-35) The company’s Keventers brand had benefited from a first-mover advantage, scalability, a competent management team, and established systems.[[36]](#endnote-36) In June 2018, the company moved the Keventers brand into the premium-milk market by launching a subscription app-based service in the Delhi NCR. The category was still in its nascent stage, but already comprised numerous regional competitors with well-developed value chains that covered dairy farms, milking, processing, and last-mile delivery to the customer’s doorstep.[[37]](#endnote-37) In January 2019, PMFL had begun supplying its premium cow milk, Pride of Cows, in the Delhi NCR.[[38]](#endnote-38) It was only a matter of time before competitors such as Amul, Mother Dairy, and Prabhat also entered the segment, thus increasing competitive rivalry. Selling premium milk raised various challenging questions for Super Milk Products regarding the required investment, business strategy, and positioning in such a competitive market.

EXHIBIT 1: TOP 10 MILK PRODUCERS IN THE WORLD, 2017

|  |  |  |
| --- | --- | --- |
| **Rank** | **Country** | **Production (in Millions of Tons)** |
| 1 | India | 146.31 |
| 2 | United States | 93.50 |
| 3 | China | 45.00 |
| 4 | Pakistan | 42.00 |
| 5 | Brazil | 35.70 |
| 6 | Germany | 29.34 |
| 7 | Russia | 29.00 |
| 8 | France | 23.20 |
| 9 | New Zealand | 21.53 |
| 10 | Turkey | 19.00 |

Note: India, China, and Pakistan are the only countries to produce buffalo milk.

Source: Created by the case authors with information from Maurice Landes, Jerry Cessna, Lindsay Kuberka, and Keithly Jones, “India’s Dairy Sector: Structure, Performance, and Prospects,” Economic Research Service/USDA, March 2017, accessed April 22, 2019, www.ers.usda.gov/webdocs/publications/82639/ldpm-272-01.pdf?v=0; Shakeel Anwar, “Top 10 Countries by Milk Production,” Jagran Josh, September 4, 2017, accessed April 22, 2019, www.jagranjosh.com/general-knowledge/top-10-countries-by-milk-production-1318490243-1.

EXHIBIT 2: india’s SHARE OF MILK RETAINED BY PRODUCERS AND MARKET SURPLUS

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Year** | **Milk Retention (%)** | **Total** | **Marketable Surplus (%)** | | | |
| **Market Shares** | | | |
| **Dairy Co-operatives** | **Private** | **Unorganized** | **Producer Companies** |
| 2015–16 (Actual) | 48 | 52 | 10 | 10 | 31 | 1 |
| 2021–22 (Projected) | 40 | 60 | 17 | 23 | 19 | 1 |
| 2023–24 (Projected) | 40 | 60 | 20 | 30 | 8 | 2 |

Source: Created by the case authors with information from Department of Animal Husbandry, Dairying & Fisheries, *National Action Plan for Dairy Development: Vision—2022* (New Delhi, India: Ministry of Agriculture and Farmer’s Welfare, Government of India, January 10, 2018), accessed May 11, 2019, http://dahd.nic.in/sites/default/filess/Vision%202022-Dairy%20Development%20English\_0.pdf.

EXHIBIT 3: INDIA’s PREMIUM-MILK MARKET’s Main COmpetitors IN the DELHI NCR

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Company** | **Binsar Farms** | | | | | | | | | | | | | | | |
| Year Established: 2009 | Farm:  Sonipat (Haryana) | Milk: Cow | | Areas Supplied: Noida, Ghaziabad, Gurugram, Delhi | | | Litres Produced per Day: 3,500 | | Price per Litre: ₹65 | | Delivery of Milk: Within 12 to 24 Hours of Milking | | Nature of Milk: Pasteurized | | Packaging:  Glass Bottle | |
| Unique Selling Propositions | ● Milk of only Swiss Holstein and Friesian cows  ● No preservatives added to milk  ● Hygienic milking  ● Zero contamination of milk  ● Hygienic and comfortable environment for cows  ● Cows housed in green environment far from the pollutants of the city  ● Cows provided with nutrient-rich greens and reverse-osmosis water  ● Entire farm designed keeping in mind cows’ comfort | | | | | | | | ● Collaboration with farmers to grow fresh greens such as maize, burseem, Iurcene, sugar graze, sorghum, cow peas, and fodder turnips, which are used as the fodder for the cows  ● Within two hours of milking, the milk is chilled to 4 degrees Celsius to lock in the freshness of the milk.  ● Milk is pasteurized and bottled within next two to three hours, then packed in batches ready to be shipped to customers through overnight transport.  ● Milk is delivered to the customer’s doorstep in insulated bags to keep it cool.  ● Customers can book a farm visit. | | | | | | | |
| **Company** | **iOrganic** | | | | | | | | | | | | | | | |
| Year Established: 2013 | Farm: Sonipat (Haryana) | | Milk: Cow | | Areas Supplied: North, West, and South Delhi | | | Litres Produced per Day: 1,500 | | Price per Litre: ₹72 | | Delivery of Milk: Within 8 Hours of Milking | | Nature of Milk: Pasteurized | | Packaging: Glass Bottle |
| Other Products | Honey, ghee, cold pressed oils, dried fruit snacks | | | | | | | | | | | | | | | |
| Unique Selling Propositions | ● Milk of only Swiss Holstein and Friesian cows  ● No preservatives, pesticides, hormones, or antibiotics administered to cows  ● Free grazing area and sheltered barns  ● Large fans and water sprinklers to keep cows stress-free  ● Complete automated process  ● Belief that happy cows produce the finest milk  ● Cows protected and pampered in a natural, wholesome, and unhurried atmosphere | | | | | | | | | ● Allow free grazing and provide around-the-clock supply of drinking water  ● Around-the-clock attendant, medical staff, and vets are available  ● Shelter in large barns to give space for rumination  ● Provide clean sanitary conditions and a wholesome nutrition diet that is free from toxins  ● Customers can book a farm visit | | | | | | |
| **Company** | **Country Delight** | | | | | | | | | | | | | | | |
| Year Established: 2013 | Farm:  Milk Sourced from Other Farmers | | Milk: Cow and Buffalo | | | Areas Supplied: Delhi, Mumbai, and Pune | | Litres Produced per Day: 15,000 | | Price per Litre: ₹53 | | Delivery of Milk: Within 48 Hours of Milking | | Nature of Milk: Pasteurized | | Packaging:  Pouch |
| Other Products Offered | Paneer, ghee, curd | | | | | | | | | | | | | | | |
| Unique Selling Propositions | ● Only Swiss Holstein and Friesian cows  ● Milking of cows only twice per day  ● 26 tests post-milking every day to ensure milk quality  ● Cattle feed grown across 80 acres (32 hectares) of land, ensuring production of toxin-free milk  ● No artificial growth hormones given to cows  ● Happy healthy cows | | | | | | | | | ● Milk is rapidly chilled to 4 degrees Celsius within seconds of milking, leading to minimal bacterial load.  ● World-class cold chain infrastructure to maintain freshness and purity of milk until it reaches the customer’s doorstep  ● Customers can book a farm visit. | | | | | | |

EXHIBIT 3 (Continued)

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Company** | **Pride of Cows** | | | | | | | | |
| Year Established: 2013 | Farm:  Mancher  (Near Pune) | Milk: Cow | Areas Supplied: Delhi (2019) Mumbai and Surat, Pune | Litres Produced per Day: 25,000 | | Price per Litre: ₹120 | Delivery of Milk: Within 48 Hours of Milking | Nature of Milk: Pasteurized | Packaging:  PET Bottles |
| Other Products Offered | Skimmed milk powder, whole milk powder, ghee, processed cheese, butter, dahi, proprietary foods such as dairy whitener | | | | | | | | |
| Unique Selling Propositions | ● Swiss Holstein and Friesian cows  ● Lush green farm with high quality of green produce  ● Each cow has its own bed, and is kept in perfect condition.  ● Cows kept cool with water sprays and fans  ● Cows nurtured and cherished  ● 24/7 on-demand supplies of food and no forced milking of cows  ● Total meal ration designed to keep cows at the pinnacle of health | | | | | ● The entire milking process is automated.  ● There is a low bacterial count.  ● No additives or preservatives are added to the milk.  ● Milk is maintained at 4 degrees Celsius until it reaches the customer’s doorstep.  ● After packaging, the milk is transported from the factory to company depots in refrigerated vans.  ● From the depot, Pride of Cows is delivered to the customer doorstep in insulated boxes with ice bags. | | | |
| **Company** | **O’leche** | | | | | | | | |
| Year Established: 2014 | Farm: Bulandshahar,  Kuchesar (UP) | Milk: Cow | Areas Supplied: Delhi NCR | Litres Produced per Day: 3,300 | | Price per Litre: ₹63 | Delivery of Milk: Within 12 Hours of Milking | Nature of Milk: Pasteurized | Packaging:  Pouch |
| Other Products Offered | Ghee, paneer | | | | | | | | |
| Unique Selling Propositions | ● Swiss Holstein and Friesian cows  ● Cows given organic fodder  ● Hygienic environment in farm  ● No chemicals or preservatives  ● No cruelty  ● No adulterations in milk  ● Daily baths through automated showers  ● Soft beds made of clay  ● Hormone injections strictly banned in the dairy farm  ● Bio-fertilizers (produced from bio-gas plant at the O’leche farm) used for growing green fodder  ● Farm hydroponically grows sprouts, makes silage of highly nutritious maize, sorghum, fresh rye grass  ● Along with green fodder, each cow given plenty of grains and minerals | | | | | ● There is an endless supply of drinking water.  ● There is high-quality automatic milking machinery, automatic pasteurization, and packing as well as timely washing of the milking equipment.  ● Cows are free to roam, socialize, and rest under temperature-controlled sheds.  ● Cows are grouped in various categories so no one cow dominates another.  ● The result is no fighting and the cows can all eat, drink, and rest peacefully.  ● Milk is pasteurized and packed within a few minutes of milking.  ● To maintain health benefits of the milk, it is pasteurized at 72.8 degrees Celsius, according to the world standard.  ● The milk is distributed in temperature-controlled vehicle to maintain freshness. | | | |
| **Company** | **Farmery** | | | | | | | | |
| Year Established: 2015 | Farm: Mahendergarh (Haryana) | Milk: Cow and Buffalo | Areas Supplied: South Delhi, Dwarka, Indirapuram, Gurgaon | Litres Produced per Day: 4,000 | | Price per Litre: ₹65 | Delivery of Milk: Within 12 Hours of Milking | Nature of Milk: Pasteurized | Packaging:  Glass Bottle |
|  | ● No synthetic growth hormones  ● No preservatives and adulterants  ● Holstein cows  ● Fodder and well-being of cattle monitored by trained vets  ● Cows and sheds washed multiple times  ● Milking is automated and untouched by hands. | | | | ● Samples are regularly checked and passed by FSSAI-accredited labs.  ● The milk is chilled to 2 degrees Celsius in bulk milk coolers.  ● Cool milk is delivered in tamper-proof bottles.  ● A daily milk purity meter is posted on the website. | | | | |

EXHIBIT 3: (Continued)

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Company** | **Wow Cow** | | | | | | | |
| Year Established: 2016 | Farm: Alwar (Rajasthan) | Milk: Cow | Areas Supplied: South Delhi | Litres Produced per Day: 350 | Price per Litre: ₹72 | Delivery of Milk: Within 12 Hours of Milking | Nature of Milk: Pasteurized | Packaging:  PET Bottle |
| Unique Selling Propositions | ● Swiss Holstein and Friesian cows  ● Entire process untouched by hand  ● Low bacterial count of milk  ● No preservatives  ● Fully automated process  ● Tamper-proof bottle  ● Chemical-free milk  ● Cows fed organic fodder from local produce | | | | ● Cows are pampered with music and showers.  ● Cattle and sheds are washed multiple times during the day to ensure they grow in a safe healthy environment.  ● Milk is chilled to 2 degrees Celsius in special bulk milk coolers.  ● Chilled milk is packed in tamper-proof bottles to maintain the right temperature for a longer duration. ● The bottles are sealed well at the farm before any transfer.  ● Milk is delivered by refrigerated trucks. | | | |
| **Brands** | **Whyte Farms** | | | | | | | |
| Year Established: 2016 | Farm: Alwar (Rajasthan) | Milk: Cow | Areas Supplied: | Litres Produced per Day: | Price per Litre: ₹75 | Delivery of Milk: Within 8–12 Hours of Milking | Nature of Milk: Pasteurized | Packaging:  Glass Bottle |
| Other Products Offered | Ghee, curd | | | | | | | |
| Unique Selling Propositions | ● Luxurious barns with large fans and high roofs to keep the cows cool during summer  ● Imported sand to keep cows comfortable  ● Special cow mattresses for when the cows want to lie inside the shed  ● Total meal ration method used for feeding cows that combines all forages, grains, protein feeds, minerals, vitamins, and additives to create right formulation for a single-feed mix | | | | ● The imported state-of-the-art machine ensures that the cows get the most nutritious diet to keep them fit and active.  ● The farm is equipped with the most advanced milking machine—the 2 × 6 herringbone parlour.  ● The machine can milk 12 cows in seven minutes.  ● The cows walk into the parlour and are milked automatically by the machines.  ● Fresh milk is passed through the PHE pipelines and chilled to 4 degrees Celsius immediately.  ● Customers can book a farm visit. | | | |

Note: PET= polyethylene terephthalate; UP = Uttar Pradesh (State in India); NCR = National Capital Region; FSSAI = Food Safety and Standards Authority of India; PHE = Plate Heat Exchanger; ₹ = INR = Indian rupee; ₹1 = US$0.0158 on January 1, 2015

Source: Created by the case authors with information from Whyte Farms, “How Are We Different,” accessed May 3, 2019, www.whytefarms.com/index.html; O’leche, “O’leche Cow Milk Is Worth Drinking!,” accessed May 1, 2019, www.oleche.org; Wow Cow Milk, “Why Wow Cow,” accessed May 2, 2019, www.wowcowmilk.com; Binsar Farms, “Binsar Quality Standards,” accessed May 3, 2019, www.binsarfarms.com/binsar-quality-standards; iOrganic, `“iOrganic Farm Fresh Cow Milk,” accessed May 1, 2019, https://iorganicmilk.com; Pride of Cows, “Why Pride of Cows,” accessed May 1, 2019, www.prideofcows.com; Country Delight, “Why Choose Us?,” accessed April 30, 2019, https://countrydelight.in; Farmery, “Farmery Cow Milk,” accessed April 29, 2019, www.farmery.in; Sharad Kohli and Shubhra Pant, “These Doodhwalas Aim at a New ‘White Revolution,’” *Times of India*, November 4, 2018, accessed May 1, 2019, https://timesofindia.indiatimes.com/city/gurgaon/these-doodhwalas-aim-at-a-new-white-revolution/articleshow/66493777.cms.

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