

‘Nandini’ Sweets – Will it be ‘Sweet’ for KMF?

KMF – An Introduction

Karnataka Cooperative Milk Producers’ Federation Limited, in short Karnataka Milk Federation (KMF), has its origin in 1974 with the setting up of Karnataka Dairy Development Corporation. KMF was established in 1984 as the apex body representing co-operatives of dairy farmers in Karnataka. KMF is the second largest co-operative dairy in the country. In milk procurement and sales, KMF is the largest in south India. The objectives of KMF are ¹:

- To provide assured and remunerative market for the milk produced by the farmer members.
- To provide quality milk to consumers.
- To build village level institutions in co-operative sectors to manage the dairy activities.
- To ensure provision of milk production inputs, processing facilities and dissemination of know-how.
- To facilitate rural development by providing opportunities for self-employment at village level, preventing migration to urban areas, introducing cash economy and opportunity for steady income.

KMF has 13 Milk Unions (constituent co-operatives – refer annexure 1 for list of milk unions and their jurisdictional districts) across the State



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¹http://www.kmfnandini.coop/index.php?option=com_content&view=article&id=54&Itemid=62

that procure milk from primary Dairy Cooperative Societies (DCS) and after appropriate treatment and packaging distribute the milk and milk products to the consumers. Coordination of activities among the Unions and developing market for Milk and Milk products is the responsibility of KMF. Marketing Milk in the respective jurisdiction is organized by the respective Milk Unions. Surplus/deficit of liquid milk among the member Milk Unions is monitored by the Federation. Starting from the first dairy in Kodagu district of Karnataka in 1955, the cooperative milk movement and KMF has grown from strength to strength and is today in an enviable position of being the market leader in milk and milk related products in South India.

The top 3 milk and milk products organizations in India are as below:

Name of the Company	Sales Turnover 2014-15
Amul (Gujarat Cooperative Milk Marketing Federation)	Rs.20,733 Crores
Karnaataka Milk Federation	Rs.10698 Crores
Mother Dairy (National Dairy Development Board)	Rs.7000 Crores (estd)

KMF has a long and chequered history. The key milestones of KMF are in annexure 1. The snapshot of KMF for FY 2014-15 is below:

Dairy Co-operatives	14444 Registered 12928 Functioning
Membership	23.00 Lakhs dairy farmers
Average Milk Procurement	58.60 Lakhs Litres per Day
Milk Sales	35.74 Lakhs Litres per Day
Total Turnover (KMF & constituent Unions)	Rs.10698 Crores

Brand Nandini

While the marketing of all the milk products is organized by KMF, both within and outside the state, all the products are sold under a

common brand name - **NANDINI**. Brand “Nandini” was introduced in 1983 as a corporate brand. Today, the brand “Nandini” is a well-recognized household brand in Karnataka, known for pure and fresh milk and milk products. The brand “Nandini” reflects the motto of KMF “Quality Excellence from Cow to Consumer”. i.e., To offer better-quality milk and milk products through their value chain from procurement to processing to marketing. KMF claims that the milk and milk products, under “Nandini” brand name, are unmatched in quality and are made available to consumers at most competitive prices. KMF further asserts that Nandini milk and milk products are “spreading wealth of health”. Nandini is the second largest milk brand in India, next to Amul.

Talking about Brand Nandini, Brand Consultant Harish Bijoor says ² “There are milk offerings from other players, but the reach and brand value of Nandini is very strong. People commit to this brand because it is a product from a unique cooperative effort, so the quality is maintained and the price regulated.” Nandini has 65% market share ³ of milk in Karnataka, the largest by a cooperative brand in any state. Nandini brand of milk is also the top choice in institutional market in Karnataka. Café Coffee Day is one such organization that sources all its milk only from KMF.

KMF looks up at GCMMF (Gujarat Cooperative Milk Marketing Federation – owners of brand AMUL) and would like to emulate their success with “Nandini” brand. Similar to Amul, KMF uses Nandini as an umbrella brand and has extended the brand to all its product lines.

KMF and Brand “Nandini” – A Marketing Mix Overview

Product

KMF has 5 product lines – milk, milk derivatives, sweets, ice-creams and frozen desserts and mixes/ other products as shown in the figure 1 below. The details of the products in all these product lines are in annexures 3-7. All the products across product lines are marketed under one brand – “Nandini”..

² The Cup Runneth Over, Business Today, April 1, 2012

³[http://www.kmfnandini.coop/index.php?option=com_content &view= article &id=103&Itemid=113](http://www.kmfnandini.coop/index.php?option=com_content&view=article&id=103&Itemid=113)

Liquid Milk	Milk Derivatives	Sweets	Ice-creams & Frozen desserts	Mixes/ Other products
<ul style="list-style-type: none"> • Toned Milk • UHT Milk • etc. 	<ul style="list-style-type: none"> • Curd • Butter-milk • Butter • Ghee • Cheese • etc. 	<ul style="list-style-type: none"> • Milk Peda • Mysorepak • Jamoon • Burfi • etc. 	<ul style="list-style-type: none"> • Different variants in cones/ cups/ tubs/ family packs 	<ul style="list-style-type: none"> • Dairy Whitener • Khova • Gulab Jamoon Mix • etc.

Figure 1 : Product Lines of KMF

Distribution

KMF distributes its products through a distribution network of over 3000 retailers across Karnataka. Milk is sold by these retailers who are appointed by the respective Milk Unions (annexure 1). Fresh milk that is processed at night, will be distributed to the retailers before 5 am every day. While milk and core milk derivatives are distributed by the constituent milk unions directly in the districts, milk products, sweets and ice-creams are distributed by KMF through wholesale dealers, bulk buyers and retailers. The distribution network is as shown in the figure 2.

The bulk buyers include institutions, marriage halls, hotels and companies like Café Coffee Day who are directly supplied by the company. KMF has also forayed into the on-line space, with selected products available through BigBasket.com.

KMF has also entered into other states in the South, especially in Kerala and Tamilnadu. In July they have forayed into Telengana with the products being launched in Hyderabad. KMF is also likely to set up a processing plant at an investment of Rs.300 Crores in partnership with Vijaya Dairy, its counterpart in Telengana⁴.

⁴http://articles.economictimes.indiatimes.com/2015-07-16/news/64495144_1_telangana-karnataka-milk-federation-hyderabad

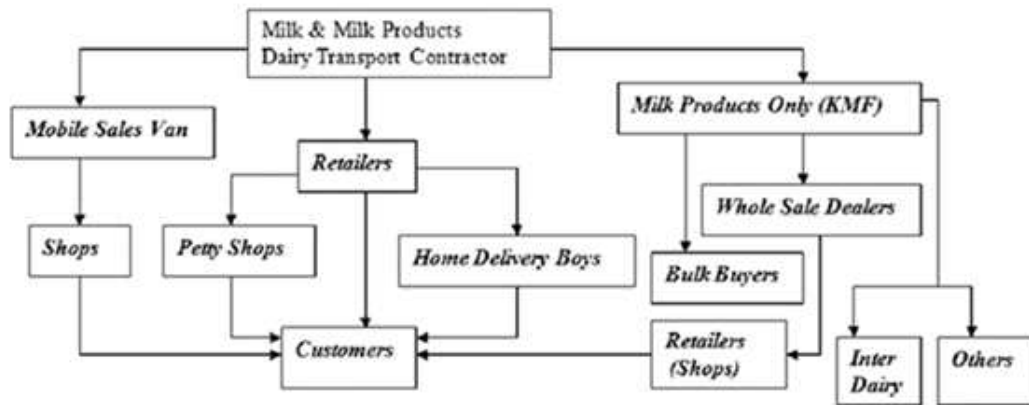


Figure 2 : Distribution Framework of KMF⁵

Price

Nandini products are priced very competitively. Milk which is the flagship product is priced in such a way as to reach out to the common man across the state. While, milk and core milk derivatives like curd and butter milk are priced lower than the private companies, butter, ghee and panneer are priced similar to the private sector. In markets other than Karnataka, the milk is priced very competitively, for ex. In Telengana 1 litre of KMF's Nandini milk costs Rs.34, while milk from other companies are available at Rs.40 – Rs.44 ⁶. But still they are able to gain market share, thanks to the quality and freshness being maintained. The sweets and ice-creams are priced similar to competition. The prices of select products are as per annexure 8.

Promotion

Promotion in marketing refers to the methods and modes used for increasing awareness of a brand or product, presenting product information to customers, differentiating and positioning a product/ brand, increasing demand, generating sales and ensuring brand loyalty. Conventionally, promotion comprises of advertising, sales promotion, personal selling, direct marketing and publicity/ public relations.

⁵ <http://tumul.coop/marketing>

⁶ <http://www.thehansindia.com/posts/index/2015-07-17/Nandini-milk-turns-aggressive-in-TS-163916>

Promotions can be classified as 'Above the Line (ATL)' or 'Below the Line (BTL)'. In ATL advertising, brands are promoted through mass media which includes television, radio advertising, print and internet advertising. BTL advertising is directed more to individuals and smaller groups and includes distribution of flyers, pamphlets, point of sale promotions, sponsorships, merchandising, product displays, demos and samplings in malls, residential colonies and market places etc.

KMF does both above the line and below the line promotions, though the accent is more on below the line promotions. In ATL, KMF advertises regularly and exclusively in vernacular media – both TV and print. It has also roped in Kannada film star Puneeth Rajkumar as a brand ambassador for endorsing its products. KMF uses below the line promotions to extensively promote Brand Nandini. Some of the BTL activities include consumer education by permitting school and college students to visit the processing plants, advertisement through wall paintings, point of sale materials like display boards, door-to-door campaigns etc.

Issues and Challenges – Nandini Sweets

Nandini Sweets – The Beginning

Nandini is the market leader in fresh milk and core milk products in Karnataka with a market share of over 65% ⁷, which is the highest by any cooperative or private dairy firms in any state. With one of the lowest milk procurement costs coupled with the planned penetration to other neighbouring states in South, Nandini is poised to gain market share in other states as well. This will help in growing the market share of Nandini milk in the country.

KMF had launched Nandini sweets way back in 1995. The sweets were launched as a forward integration since all the sweets had milk as one of the ingredients. The management realized that the margins in value added products like processed milk and sweets are much higher than fresh milk. This is imperative for the growth of the organization since fresh milk is a high volume, low profitability business. For every rupee

⁷[http://www.kmfnandini.coop/index.php?option=com_content &view=article&id=103&Itemid=113](http://www.kmfnandini.coop/index.php?option=com_content&view=article&id=103&Itemid=113)

earned in milk, 87 paise goes to the farmers. The net margin in fresh milk is less than 2%. However in processed milk products, the margins can go upto 30%. Hence, to support the growth of the milk business, the non fresh-milk businesses, especially value added products like sweets need to register high growth.

The first product to be launched was barfis. Subsequently, at regular intervals, new products have been added to this product line of sweets. All the products carry Nandini brand. Currently, the sweets product line includes over 15 products that includes barfis (of different flavours), rosgolla, gulab jamun, mysore pak etc.

An understanding of the Indian sweets market will help in appreciating the challenges faced by Nandini sweets,

Sweets Market in India

The market size of Indian food sector is expected to grow to Rs.882,000 Crores in 2015-16⁸ as shown in figure 3 below:



Figure 3: Food processing sector is classified into two categories

- **Commodity-Based Processing** - processing of commodities like rice, wheat, spices, sugar etc.

⁸ India's Food Sector: Cashing in on Forthcoming Opportunities, January 2014, Report by Technopak Advisors

- **Value-Added Processing** - processing of milk and milk products, bakery items, ready to cook and ready to eat items etc.

Value-added processing though low in terms of the overall contribution to the food processing sector is growing at a healthy CAGR of 10%, the high growth sectors being health foods, dairy, ready to eat, fruit juices, convenience foods etc.

Changing demographic patterns – like increased urbanization, growing middle class and disposable incomes, emergence of dual income households and nuclear families, emergence of high income working women – and changing food habits and lifestyles have led to the exploding growth of convenience food and this sector is expected to grow at a CAGR of 12%⁹ in the next five years. The convenience food break up is as shown in the figure 4 below:

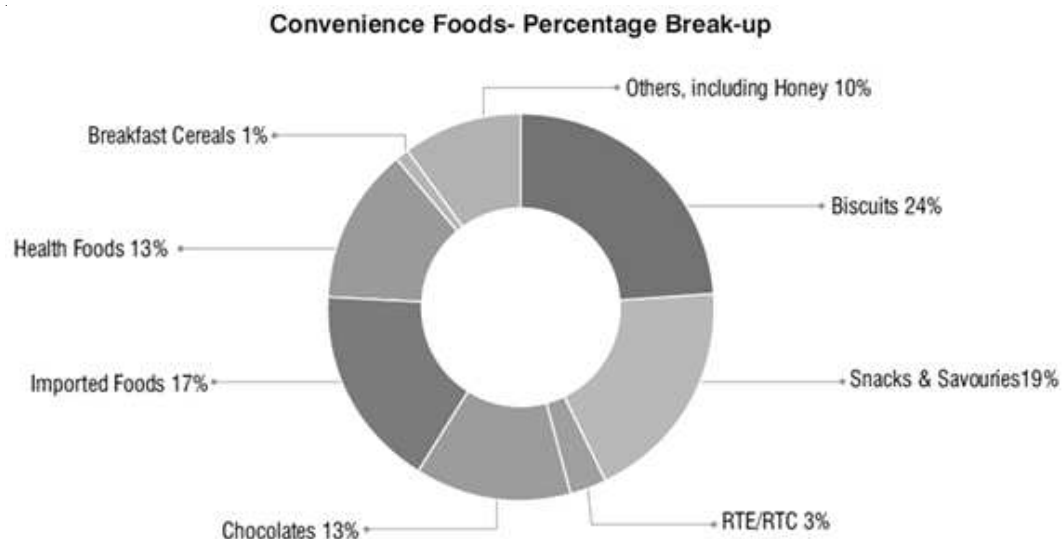


Figure 4¹⁰ :

As shown in the figure 4, the market for Snack & Savouries and chocolates together contribute to 32% of the overall convenience food market in India and these sectors are expected to grow at a CAGR of 8% and 15% respectively¹¹

⁹ India's Food Sector: Cashing in on Forthcoming Opportunities, January 2014, Report by Technopak Advisors

¹⁰ Ibid

¹¹ Ibid

In the snacks and savouries market, Indian sweets that include a variety of milk based sweets like rosgollas, gulab jamuns, pedas, barfis etc are a big category and have huge market in India. The market for Indian sweets and snacks is estimated at Rs.45,000 crore¹². This market is highly unorganized and is dominated by regional and local companies.

Nandini as a brand, is present in this category and is keen on growing this category. Though the competition for this category mostly comes from unorganized players in different geographies, there are quite a few organized players in the Indian market, the prominent ones being Haldiram's, Bikanerwala, Chhappan Bhog, Mongini's, Sri Krishna Sweets etc. The market for traditional Indian milk-based sweets alone is estimated at \$500 million¹³.

The biggest emerging competition for Indian sweets is from chocolates. A report by leading market research agency Datamonitor¹⁴ revealed that the growing demand for chocolates and treats from large FMCG brands are fast replacing traditional sweets during Indian festivals. Multinational companies like Mondelez (owners of Cadbury and Toblerone brands) and Nestle are aggressively wooing the customers and weaning them away from traditional Indian sweets to chocolates. In addition to being an indulgent, impulsive and aspirational choice, chocolates are being increasingly positioned as a sweet for special occasions. With distinctive advertisements, slick marketing and glossy packaging, FMCG companies are pushing the consumers from Indian sweets to chocolates. The longer shelf life of chocolates also help in reaching out to the nook and corner of the country. People getting more health conscious amid growing lifestyle diseases has further added to the woes of the Indian sweets industry and are fuelling the growth of chocolates.

India's chocolate industry is currently valued at around Rs 5,000 crores in 2014 and is expected to cross Rs 7,500 crores¹⁵ by 2016. Mondelez

¹²<http://www.livemint.com/Companies/HAh1d396KdeWBp7cKWuA0I/Streamlining-the-sweet-shop.html>

¹³<http://www.indianretailer.com/article/sector-watch/food-and-grocery/Unlocking-the-Sweet-Industry.a311/>

¹⁴<http://www.thenational.ae/business/retail/battle-for-indias-sweet-tooth#full>

¹⁵ <http://timesofindia.indiatimes.com/life-style/food/food-reviews/Its-ladoos-over-chocolates-for-Indians/articleshow/44855126.cms>

(Cadbury) is leading the pack with about 70 percent market share followed by Nestle and Amul.

Though the chocolates are eating away the market share of Indian sweets, it is the unorganized sector that will be greatly impacted. The organised sector with its distribution and marketing reach is expected grow on the back of strong economic growth and growing wealth. Further Indian sweets like laddoos and gulab jamuns will always have an emotional bond with Indians as compared to chocolates as they are a part of Indian culture. The factor that goes in Nandini's favour is brand 'Nandini' is also into chocolates, which is part of the sweets category.

Nandini Sweets – SWOT Analysis

Nandini is a market leader in fresh milk in Karnataka. However, when it comes to other product categories like sweets and ice-creams, Nandini languishes at the bottom. Of the total turnover of KMF, milk and milk products contributed on an average 88.73% ¹⁶ during the period 2008-12, with just around 11% coming from other products. This is in spite of the fact that, KMF has over five other product lines and over 60 other products. The biggest challenge that is facing KMF today is 'how to grow brand Nandini' beyond fresh milk. Specifically, how to grow 'Brand Nandini' in the category of sweets. The SWOT analysis for Nandini sweets is shown in figure 5



Figure 5 : SWOT Analysis : Nandini Sweets

¹⁶ <https://www.indiaratings.co.in/upload/sectors/ratingReports/2013/4/2/fitch02Milk.pdf>

With milk market getting saturated in Karnataka, KMF is reaching out to other neighbouring states for growth. However, the much needed surplus and profit can be generated only if KMF aggressively grows its non- fresh milk products. For example, in case of GCMMF(Amul), milk was contributing to 80-90% of the company's top-line five years ago. Now in 2014-15, it is estimated that 35-40% of its top-line is contributed by value added products¹⁷. It is this model that Nandini wants to follow. Now the question that management of KMF is pondering is what they should do to grow the non-fresh milk business, especially Nandini brand of sweets.

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¹⁷ http://www.amul.com/files/pdf/4-5-2015_Amul_owner_tastes_Rs_20k.pdf

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The Cup Runneth Over, Business Today, April 1, 2012

Annexure 1**List of Cooperative Milk Unions under KMF**

Sl. No.	Name of the Milk Union	Districts Covered
1.	Bangalore Milk Union	Bangalore Urban, Ramanagaram and Chickaballapur
2.	Belagavi Milk Union	Belagavi
3.	Ballari Milk Union	Raichur, Ballari & Koppal
4.	Bijapur Milk Union	Bijapur & Bagalkot
5.	Dakshina Kannada Milk Union	Dakshina Kannada
6.	Dharwar Milk Union	Dharwad, Haveri, Gadag and Uttara Kannada
7.	Kalaburgi Milk Union	Kalaburgi and Bidar
8.	Hassan Milk Union	Hassan & Chickmagalur
9.	Kolar Milk Union	Kolar
10.	Mandya Milk Union	Mandya
11.	Mysore Milk Union	Mysore & Chamrajnagar
12.	Shivamogga Milk Union	Shivamogga, Davanagere and Chitradurga.
13.	Tumkur Milk Union	Tumkur

Annexure 2

Key Product/ Marketing Related Mile Stones of KMF

- 1955** First Dairy in Karnataka set up at Kudige, Kodagu Dist.
- 1965** Biggest Dairy in Karnataka with 1.5 lakh ltrs. per day liquid milk processing facility \set up at Bangalore
- 1974** World Bank aided Karnataka Dairy Development project implemented.
- 1974** Karnataka Dairy Development Corporation (KDDC) is born.
- 1975** First registration of Milk Producers' Co-operative Society.
- 1975** Government dairies transferred to KDDC.
- 1976** First registration of Union.
- 1980** Karnataka Milk Products Limited established.
- 1983** Corporate brand name 'Nandini' born
- 1984** Karnataka Milk Federation is born.
- 1984** KDDC transformed into KMF.
- 1987** Dairies at Hassan, Tumkur & Mysore transferred to district milk unions.
- 1988** Dairies at Bangalore, Gejjalagere, Dharwad, Belgaum and Mangalore transferred to district milk unions.
- 1991** Chilling & Processing plants at Bijapur, Gulbarga, Bellary, Shimoga and Kolar transferred to District Milk Union.
- 1994** Liquid Milk Sale Crosses Million Litres/day.
- 1994** Starting of Sales Depot at Bangalore.
- 1995** Varieties of New Nandini Products viz. Nandini Paneer, Burfi, Khova & Sweet curds launched.

- 1997** Inauguration of Ice-cream manufacturing unit at Mother Dairy Premises, B'lore
- 1998** Launching of New Products
 - a) Jamoon Mix
 - b) Mysore Pak
 - c) Tetra Fino Packaged Nandini "Goodlife"milk
- 1999** Starting of Sales Depot at Tirupathi.
- 2000** Launching of New Products
 - a) Badam Powder
 - b) Good life High fat milk
- 2002** Launching of New Products
 - a) Nandini Goodlife Slim
 - b) Goodlife Tetrapak
- 2003** Launching of New Product - Kunda
- 2004** Launching of New Products
 - a) Yoghurt A
 - b) Besan laddoo
- 2005** Launching of ' Nandini Set Curd'.
- 2005** Karnataka stands 2nd in milk Proc.
- 2006** Depos opened at Kerala (Kannur & Ernakulam).
- 2006** Launch of new generation Drinks -Tetra Pack variants of Flavored milk & Buttermilk.

- 2007** Release of Nandini Homogenized cow milk(3.5%Fat / 8.5%SNF) in Bangalore.
- 2008** Launch of New products & new stunning packs (Sundae, Crazy Cone ice cream/Lite Skimmed Milk/ Cool Milcafe/Choco Milk Shake/Dairy Whitener/ different variants of ice-creams/ different variants of flavoured milk.
- 2008** Launch of Kesar & Elachi Pedas, Nandini Magic - dessert
- 2009** Nandini won “The Most Valuable Brand in Karnataka Award” in the ‘Sunday Indian & IIPM Regional Excellence Awards 2009’
- 2009** Launch of Good Life variants in Cuttack, Orissa, Tiruchi (Tamilnadu), release of Sampoorana Goodlife Variant, Mini Chocobar, Nutty chocobar, Mutka-culfi etc.
- 2010** - Signing of MOU between KMF and IOCL to make available Nandini milk & milk products at IOCL petrol bunk outlets in Bangalore city and Karnataka
- 2011** - The two Co-Operative giants KMF & CAMPCO entered into an agreement by signing MOU for production of CHOCOLATES
- 2011** - The Grand Launch of Brand New 10 milk products by popular Kannada cinestars – powerstar Mr. Punith Rajkumar & Ms. Ragini Dwivedi.
- Nandini enters sweet world of Chocolate Nandini Creamy Bite, Goodlife, Chit Chat & Eclairs.
- KMF launches e-commerce/e-sale for selling the delicious Nandini products through internet facility.
- 2013** Sales Depot has started at Vijayawada on 03.10.2013
- 2014** Nandini Milk Sales started in Chennai
- 2014** Golden Jubilee celebration of Bangalore Dairy

Annexure 3

Products of KMF

Milk



Pasteurised Toned
Milk



Shubham Milk



Nandini Double
Toned Milk



Sampoorna
Standardised Milk



Smart Double Toned
Milk



Goodlife UHT Long
Life Milk



Sampoorna
Standardised Milk



Smart Double Toned
Milk



Goodlife UHT Long
Life Milk



Special Toned Milk



Slim



Good Life

Annexure 4
Products of KMF
Milk Derivatives



Yoghurt



Mango Lassi



Real Thick Curd



Curd



Butter Milk



Sweet Lassi



Ghee in Standby
Pouches



Butter Salted &
Unsalted



Paneer



Process Cheese
Spread



Cheddar Cheese



Diced Paneer



Flavoured Milk Pista



Flavoured Milk
Spiced Butter Milk



Flavoured Milk
Strawberry

Annexure 5

Products of KMF

Sweets



Mysore Pak



Khova Jamoon



Dry Fruits Burfi



Rasgulla



Assorted sweets gift
box



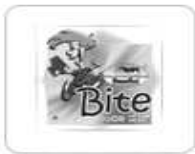
Coconut Burfi



Vermicelli Payasa
Mix (Kheer)



Chocolate Burfi



Nandini Bite



Premium Badam burfi



Premium Besan
Ladoo



Premium Cashew
Burfi



Pure Milk Elachi and
Kesar Peda



Pure Milk Peda



Dhanwad Peda

Annexure 6

Products of KMF

Ice-Creams & Frozen Desserts



Crazy Cone Ice
Cream Butter Scotch
Chocolate



Nandini Magic
Strawberry



Pista Kulfi



Chocobar



Ice Cream
Delightfully Tasty
Anjir



Ice Cream
Delightfully Tasty
Chocolate



Ice Cream
Delightfully Tasty
Vanilla and
Strawberry



Ice Cream
Delightfully Tasty
Kaju Draksh



Ice Cream
Delightfully Tasty
Mango



Ice Cream
Delightfully Tasty
Kesar Pista



Ice Cream
Delightfully Tasty
Black Currant



Casatta Ice Cream



Nandini Sugar Free
Pro Biotic Frozen
Food



Matka Kulfi



Ice Cream
Delightfully Tasty
Butter Scotch



Ice Cream
Delightfully Tasty
Pineapple



Dolly Stick Ice
Cream Raspberry &
Orange



Ice Candy Mango



Sundae Ice Cream
Strawberry



Sundae Ice Cream
Butter Scotch



Ball Ice Cream
Vanilla Strawberry

Annexure 7
Products of KMF
Mixes/ Other Products



Dairy Whitener



Skimmed Milk
Powder



Badam Milk Mix



Gulab Jamoon Mix



Khova



Nandini Magic
Strawberry



Kunda

Annexure 8**Prices of Select Nandini Products**

Nandini Toned Milk	Rs.15 for 500 ml & Rs.30 for 1 litre
Nandini Homogenized Toned Milk	Rs.9 and Rs.15 for 250 ml and 500 ml respectively
Nandini Homogenized cow Milk	Rs. 17 for 500 ml
Nandini Curds	250 grams & 500 grams pack. Prices are Rs.10 & Rs.19 respectively.
Nandini Spiced Buttermilk	Rs. 6 for 200ml
Nandini Sweet Lassi	Rs. 8 for 200 ml
Nandini Ghee	Rs.78, Rs.192, Rs.380, and Rs.6000 respectively for 200ML, 500ML, 1 litre packs & 15kg tins
Nandini Peda	Rs.9, Rs.30, and Rs.70 respectively for 25gms, 100gms, 250gms pack. Kesar peda Rs. 80 for 250gms pack
Nandini Mysore Pak	Rs.10, Rs.38, and Rs.85 respectively for 25gms, 100gms and 250gms pack
Nandini Cashew Burfy	Rs.56 and Rs.130 respectively for 100gms & 250gms pack.
Nandini Panner	Rs.55 & Rs.220 for 200gms and 1kg respectively
Nandini Khova	200gms pack & 5kg bulk pack priced at Rs.52 and Rs.260 respectively.
Nandini Bite	Rs.8 per piece of 25gms
T salted Butter	Rs.34 & Rs.182 for 100gms & 500gms respectively
Nandini Milk Powder	Rs.64, Rs.160 & Rs.300 respectively for 200gms, 500gms and 1kg
Flavour Milk	200ml at Rs.20
Nandini Slim Milk	Rs. 20 for 500ml
Nandini Good life Milk	Rs. 20 for 500ml
Nandini Mango Lassi	Rs. 10 for 180ml

