

Indian cheese industry

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Market Analysis: The Indian Cheese Industry| September 18 2010 | This Report gives a market study of the Indian cheese industry, key players and their market shares and strategies. It contains a study about the scope for growth in this sector and a SWOT analysis of the same. | Indian Cheese Industry| INDEX Sr. No| Topic| Page No. | 1. | Overview| 1| 2. | Market Size and Growth| 1| 3. | Key Players| 1| 4. | Analysis of Individual Players4. 1. Gujarat Cooperative Milk Marketing Federation (GCMMF) 4. 2. Britannia New Zealand Foods Private Ltd. Industries Limited (BNZF)4. . Dabon International Private Limited4. 4. Imported Cheese Market4. 5. Regional Players| 33781011| 5. | SWOT Analysis of the Indian cheese industry5. 1. Strengths5. 2. Weaknesses5. 3. Opportunities5. 4. Threats| 1212131314| 6. | Market Segmentation| 14| 7. | Trends in the Indian cheese market| 15| 8. | Observations| 15| 9. | Summary| 16| 10. | Key Government Contacts| 17| 11. | References| 18| The Indian cheese Industry 1. Overview Except for the popular Indian variety of cottage cheese-Paneer, India is not traditionally a 'cheese nation'.

But, with the growing saturation of cheese consumption in the West and encouraging successes in other 'non-cheese' Asian countries like Japan and China; overseas cheese producers are eyeing the Indian market for its huge promise. The organised cheese industry in India is at best in its nascent stage, accounting for less than 1% of total dairy production and largely limited to urban consumption. Though cheese was first marketed in India under the brand name 'Amul', from the popular Amul butter stable in the late 1970s, it attained an identity of its own only as late as 1990s. 2.

Market Size and Growth rate The organized cheese industry in the country as of 2006, is valued at Rs 250 crore (US\$ 50 million), with a volume of more than 8000 tonnes. The industry growth rate is estimated at about 10%-12% per year in terms of volume and 16%-17% per year in value terms. Current household cheese penetration is 5%, with about 50% of consumption being limited to cities. Mumbai and Delhi together capture half of the cheese market. Within cheese products, around 60% of the market is dominated by processed cheese, 30% by cheese spreads and the remaining 10% by flavoured and specialty cheese. .

Key players The Indian cheese market is dominated by Gujarat Cooperative Milk Marketing Federation that uses the brand name Amul and Britannia New Zealand Foods Pvt. Limited, using the brand name 'Britannia MilkMan'. Amul is way ahead of competition and owns about 60% of the market. Britannia has about a 25% share. Other players are Dabon International Private Limited, a wholly owned subsidiary of the French dairy company Bongrain S. A and other regional brands like Mother Dairy and Vijaya. These companies have a 10% market share.

The remainder 5% of the market is taken by imported cheese brands, retailed in specialty stores.

Table 1: The Indian Cheese Market Key players

Brand(s)	Estimated Share of Market (%)
Amul	60
Britannia MilkMan	25
Le Bon, Regional brands e. g. Mother Dairy, Vijaya	10
Imported brands e. g. Kraft, Laughing Cow	5

Fig 1: Pie chart showing % market share of the major players

4. Analysis of individual players:

4. 1. Gujarat Cooperative Milk Marketing Federation (GCMMF)

4. 1. 1. Company Profile: Amul is the leading

brand name for products produced and marketed by the Gujarat Cooperative Milk Marketing Federation (GCMMF).

GCMMF is an apex body of milk co-operatives in Gujarat and heralded the 'white revolution' in India that turned the country from having a milk-deficit to the largest milk producer in the world. GCMMF also markets milk powder and dairy whiteners under the Amulya and Sagar brand names. Amul is the oldest and the most established dairy brand in the country, with its first product, Amul butter, being marketed since 1946. Today, the company has its roots deep in the dairy market and is increasingly focusing on the value added segment that includes health drinks, cheese and dairy based desserts.

Turnover in 2005-2006 was US\$ 850 million with a year-on-year growth of 29%. 4. 1. 2. Cheese Perspective: Amul brands and markets itself as the largest vegetarian cheese producer in the world since all its cheese varieties are made from microbial rather than animal rennet. This immediately makes the brand's' cheese products favourable in a country with the most vegetarians in the world. Also, it sources its cheese from buffalo milk, which is popular in India. 4. 1. 3: Products The various products produced by Amul are shown in the table below.

Table 2: Cheese Products by Amuls

Cheese Product	Description	Maximum Retail Price
Amul Pasteurised Processed Cheese	A cheddar cheese	400g: Rs 86 1 kg: Rs 163
Amul Cheese Spreads (in three flavours)	Combination of Cheddar and soft cheese.	200g: Rs 32
Amul Emmental Cheese	Specialty Swiss cheese which is sweet, dry and has a hazelnut aroma	400g: Rs120
Amul Pizza Mozzarella Cheese	For use in pizzas	200g: Rs 43
Gouda Cheese	Specialty Dutch cheese. Manufactured under a Swiss technical	

collaboration in the North Eastern Himalayan state of Sikkim. | Amul chiplets| Individually packed single serve cheese cubes| 200g: Rs 50| Amul Malai Paneer| Indian cottage cheese| 100g: Rs14200g: Rs 26 1kg: Rs 115| Amul cheese slices| For sandwiched and burgers| 100g: Rs27 200g: Rs52| Amul Pizza| Frozen pizzas| Rs 30| Its cheese business grew at 18% in 2005-2006. GCMF exports cheese to the tune of 600 tons, making it the largest cheese exporter in the country. The export market includes the Middle East, Singapore, Hong Kong, and the United States of America; countries that have a large Indian population, and the neighbouring countries of Sri Lanka, Bhutan and Nepal.

A very rewarding strategy for Amul has been to also enter the cheese dependent food product category. It produces over 300, 000 frozen pizzas (using mozzarella cheese), priced at a mere Rs 30 apiece. This has provided strong competition to international brands in the market which traditionally only sell pizzas at their retail outlets and at much higher prices. 4. 1. 4. Strategy: As its product lists, GCMF has capitalized on the value added segment with a wide range of Amul cheeses. The Amul brand represents 'value for money' to the Indian consumer and its cheese portfolio is competitively priced and of assured quality.

The company has been aggressively marketing its cheese products, to the extent of even moving away from its umbrella brand strategy and introducing a new mascot, the Amul Cheese Boy. When low cost pizzas were introduced, GCMF adopted an innovative and successful strategy of increasing sales of an elitist product (cheese) by reducing the price of another elitist product (pizzas). Especially since 2005, the company has

focused on expanding its already strong distribution network to smaller cities as cheese demand has rapidly expanded beyond the large metros. . 2. Britannia New Zealand Foods Private Ltd. Industries Limited (BNZF) 4. 2. 1. Company Profile: BNZF is a joint venture company founded in 2002 by Britannia Industries Limited (BIL) and Fonterra Co-operative Group of New Zealand. The company focuses entirely on the dairy business, with cheese being its flagship product. The other products it sells are dairy whiteners, butter, ghee (Indian clarified butter) and a malt drink- Anlene. All products are marketed under the 'Britannia MilkMan' brand.

BIL (known as Britannia Biscuit company until 1979) has essentially been a 'biscuit company', that had humble beginnings in Calcutta in 1892. Its big break came during World War II when the Indian Government contracted it to supply biscuits to the armed forces and since then it became a market leader in the biscuit segment. In 1954, the company also began producing and selling bread and it was as late as 1997, that it entered the dairy industry. In 2002, Forbes Global rated BIL as one of the top 200 small companies of the world and as a strong and trusted brand in India.

The Wadia Group of India along with Groupe Danone of France are equal shareholders in ABIL, UK which is a major shareholder in Britannia Industries Limited. Fonterra Cooperative Group is New Zealand's largest company and amongst the ten largest dairy companies in the world. The dairy expertise and global experience for the Joint Venture comes from Fonterra Cooperative while Britannia's contribution is its brand name, large distribution network and the understanding of the Indian market. Like BIL, BNZF also comes under the umbrella of the Wadia Group of companies.

Its turnover in 2005-2006 is US\$ 24 million with about 50% coming from processed cheese, 30% from the dairy whitener and the remaining 20% from butter and ghee sales.

4. 2. 2. Cheese Perspective: BNZF only sells in the processed cheese segment and has five variations of processed cheese in the market, besides a cheese dip product. Over half of the company's revenues come from the processed cheese segment. BNZF cheese is priced at a premium in the market; one reason being that the cheese is sourced from cow's milk (unlike Amul that sources its cheese from buffalo milk).

2. 3. Products: Cheese cubes, Cheese singles (regular and Slim variants), Britannia Milkman Malai Chaska- a soft, fresh and creamy 'dairy spread,' which has a mild, tangy taste, Britannia cheese spread in different flavours like Masala Herbs, Spicy Cilantro, Peppy Pepper etc. , and Pizza cheese.

4. 2. 4. Strategy: Rather than focusing on competitive pricing, BNZF has adopted a 'three-pronged strategy' of: Freshness (lower pipeline stock), Availability (improve distribution network) and Visibility (more shelf space at modern trade).

At present, cheese products, contribute to around 50 % of the Rs 120 crore turnover of the dairy product company (which markets its products under the brand name Britannia Milkman) while its Dairy whitener contributes to 30% and butter and ghee together account for 20 %.

4. 3. Dabon International Private Limited

4. 3. 1. Company profile: Dabon International Private Limited is wholly owned by the French dairy major Bongrain SA. The company began as a joint venture with Dabur India in 1996, but in June 2005, Dabur exited from the business.

The company said that they had decided to exit because cheese and milk products were a 'non-core' business for them. Dabon is the only international cheese company to produce and sell cheese in the country, using the brand name Le Bon. It has a state of the art facility in Noida, near Delhi. Despite having made losses, the company has been in an expansion mode, offering a selection of processed cheese products. Adapting to Indian tastes, it has also recently introduced in Delhi and Mumbai, Indian cottage cheese with the brand name 'Le Paneer'. Dabon markets its cheese to both the retail and institutional sector. . 3. 2. Cheese Perspective: Dabon focuses on the processed cheese segment, catering to both the retail and institutional markets. In the former, it has been targeting families and children (like the other brands) and in the latter category, it has standard and customized products for fast food chains, hotels, flight caterers and restaurants. Some of its institutional clients include Domino Pizza, Papa John's Pizza, Oberoi Flight Services and the Ambassador.

Besides drawing on the international cheese portfolio of its parent Bongrain SA, Dabon has realized that to compete, it has to cater to ethnic tastes. Le Paneer', the Indian cottage cheese variety was recently introduced as a brand in Delhi and Mumbai. 4. 3. 3. Products Table 3: Dabon Products for the Retail Sector

Cheese Product	Description	Maximum Retail Price
Le Bon Creamy n Sancky Cheese Portions	A ready to eat snack, targeted at children.	6 portion pack - 114g - Rs 36 Single portion - 19g - Rs 6
Le Bon creamy Cheese spread (Bottled spread in two flavours: Plain and Black pepper)	Marketed as a low fat butter substitute, with 60% less fat than butter.	Both flavours: 200g-Rs 45
Le Bon Tasty Cheese Slices (Two flavours:		

Plain and Black pepper)| A ready to eat snack, targeted at children| Plain: 170g- Rs 57 Black Pepper: 170g- Rs 59| Le Bon Grate n Garnish Cheese| A mild processed cheese for grating and garnishing. | Comes in 4 different pack sizes: 100g - Rs 24, 200g - Rs 46, 400g - Rs 86, 1Kg - Rs 185| Le Bon Paneer| Indian Cottage cheese| 200g: Rs 26 400g: Rs 50| Table 4: Dabon Products for the Institutional Sector Cheese Product| Description| Creamy n Sancky Cheese Portions| Suitable for in-flight meals, mini-bars and breakfast buffets.

Available in 19g portions| Creamy Cheese spread (Two flavours: Plain and Black pepper)| Suitable for Italian food, baked dishes and dips| Individually wrapped cheese Slices (Two flavours: Plain and Black pepper)| For burgers and sandwiches. Available in 17g portions| Grate n Garnish Cheese| An all-purpose mild processed cheese for grating and garnishing. Available in 1kg blocks| Cheddar Processed Cheese| All-purpose cheddar processed cheese. Available in 1kg blocks| Le Bon Paneer| Indian Cottage cheese. Available in 200g and 400g packets| 4. 3. 6. Strategy:

Dabon has played it safe in the Indian market so far, confining production and sales to the popular processed cheese and Paneer segment. It capitalizes on the fact that it uses international world class production techniques with a focus on quality and hygiene. Bongrain SA obviously believes in the potential for cheese in India, increasing its investment in the country despite having its joint venture partner Dabur pull out. 4. 4. 1. Imported cheese Market When the Indian government removed quantitative restrictions on consumer products in 2001, it was expected that imported products would flood the market and pose a threat to local brands.

International cheese companies have established agents to market their products and enter the Indian market. The three main importers are: Bel Fromageries which introduced its Laughing Cow brand in 2001 and more recently, Kiri cream cheese. Kraft cheese is presently available only in specialty imported goods stores. However, the company is planning to enter the Indian market and its strategy is to have an extensive reach into small retail outlets in the country. The company also aims at a presence by introducing 'affordable products with the right attributes that meet local consumer needs'.

Boursin a large French cheese maker announced its entry as an importer of cheese into the Indian market in November 2006. Boursin will be traded in the country by RRO, which has a tie up with Unilever for marketing and distribution. RRO is an established importer of international branded consumer food items. Boursin is a 100% Vegetarian Cheese since it is made without animal rennet. The product is available in four varieties in the country: Boursin Plain, Bourisn Garlic and Fine herbs, Boursin Pepper, and Boursin Shallot and Chives.

Boursin Cheese is available at several leading food outlets in the country. 4. 5. 1. Regional Players: Encouraged by the success of Amul, many state dairy cooperatives have entered the cheese segment. These cooperatives have capitalized on their existing brand strengths to capture a sizeable market share in their region. Prominent regional players are: Table 5: Regional Players in the Indian Cheese Market Company| Brand ; amp; Regions| Cheese Products| Other Products|

Mother Dairy India Limited (wholly owned by National Dairy Development Board)| Mother Dairy (North India, Mumbai and Calcutta| Individually wrapped slices, Cheese spread, Cheese cubes and Paneer| Liquid Milk, Yogurt, Ice creams, Dairy Whiteners, Butter, Frozen vegetables, Fresh fruits and vegetables, Vegetable oils and Fruit juices| Milkfed (Punjab State Cooperative Milk Producers Federation)| Verka (North India, Mumbai and Calcutta)| Cheese spread, Processed cheddar cheese, Natural cheddar cheese, Cheese singles and Paneer| Flavoured milk, Lassi, Yogurt, Butter, Ghee, Milk powders, Malted drink, Ice-creams, Milk based Indian sweets| Andhra Pradesh Dairy Development Cooperation Federation (APDDCF)| Vijaya (Predominantly South India based)| Processed cheese| Sterilized Flavoured Milk, Paneer, Indian sweets and Buttermilk| Of the above listed players, Mother Dairy is the largest, with aggressive growth plans in the cheese business.

The company's strategy is to focus on the large children's segment, with two successful marketing campaigns in 2006 - aimed at the child consumer, and to have a better relationship with retailers. As part of its strategy to increase its national presence, Mother Dairy also plans to improve its distribution network and increase the shelf life of its cheese - so as to increase its reach in the country. Mother Dairy's sales for cheese are increasing at about 30-40% a year. Two other state cooperatives that produce and market cheese are the southern states of Karnataka (Nandini brand) and Tamil Nadu (Aavin brand). These two brands though, essentially maintain a state presence rather than a regional one.

5. SWOT Analysis of Indian cheese industry

For developing a sound strategic plan for the cheese industry and mainly for the marketing and brand recognition, first a detailed analysis is required to be done. For this reason, a SWOT analysis of the same is done as shown below:

5. 1. Strengths: The Demand for cheese is ever increasing with change in the consumption pattern of consumers. In the mass consumption category, Indian consumers are more ready to buy off the shelf. Paneer, which all the major cheese producers are marketing as a branded product, was traditionally homemade. Secondly, with greater international exposure, rising incomes and brand affiliation; the demand for niche cheese products has increased.

Amul was an early mover in capitalizing on the demand for specialized cheeses like Gouda and Emmental. The profit margins for companies are quite reasonable since competition is not very fierce like in the Indian telecom sector. The availability of raw material is abundant since India is the world's largest milk producer, accounting for more than 13% of world's total milk production. India has abundant technical manpower which can be professionally-trained; a technical human resource pool is available.

5. 2. Weaknesses: One of the biggest problems in the marketing of cheese is the lack of existing infrastructure, especially cold chains from the producer to the consumer.

Existing players, especially Amul that also uses such facilities for its other dairy products like milk, already has a fairly well established national network. However, new entrants, including importers need to make extra infrastructural investments. This can be quite daunting for companies that are making a market entry into the dairy and cheese industry, particularly

with limited existing knowledge of current distribution issues. The lack of cold storage facilities cause the biggest problems to regional players who are trying to gain a national presence. They neither have existing infrastructure nor the financial muscle of international companies. To improve logistical issues, some regional players, like Mother Dairy are positioning their plants in different geographical regions.

Many regional cheese brands are currently not able to retail nationwide because of the limited shelf life of their cheese products. For example, Mother Dairy, a subsidiary of the National Dairy Development Board and a hugely successful retailer has confined most of its sales to the northern belt. Its reason- the shelf life of most of its dairy products including cheese is only about 10 days. . India being the second largest country in the world and a land of distances, most regional producers do not have the advanced packaging, processing and distribution technology for geographical expansion

5. 3. Opportunities: The increasing incomes of the people due to a strong growth in the GDP allow huge potential for growth. The cheese industry is growing at almost 20% per year.

The explosion of retailing in India will probably have a significant impact on the cheese industry; it will provide the cheese manufacturing companies with better distribution networks which will result in an increase in sales. There is a phenomenal scope for innovations in product development, packaging and presentation. I. e. Indianization of cheese by coming up with various different flavours suited to Indian tastes. E. g. Dabon, in acknowledgement of customer preferences for indigenous cheese, has customized their portfolio to include paneer. Efforts to exploit export

potential are already on. Amul is exporting to Bangladesh, Sri Lanka, Nigeria, and the Middle East. Following the new GATT treaty, opportunities will increase tremendously for the export of agro-products in general and dairy products in particular for the local players.

There is scope for improvement in Food Technology to increase the shelf life of cheese and thus increase the nationwide presence of cheese products.

5. 4. Threats: Importing cheese, especially for mass consumption faces two main stumbling blocks: i) High costs: Added to the high cost of importing cheese, importers often also have to invest substantially in a distribution network due to the lack of cold chains. Indian consumers are price sensitive and importers find it difficult competing against local, better priced brands, which are also in synch with the local palate. ii) Inordinate time lag in supplies: Due to logistics and the duration of the import process, replenishing stock takes at least a couple of months, making it difficult for importers to cater rapidly to demand variations.

Competition among Sellers: The two pronged strategy that sellers will follow in the next few years is i) To increase the size of the market through greater awareness, and ii) To increase availability of cheese products to the expanded market. The Amul and Britannia brands have the strongest national dairy brand identity. To compete with these established brands and gain national presence, other cheese retailers will resort to heavy marketing. Cheese advertising budgets alone are likely to be around 2%-4% of total revenues. Advertising strategies could include, for e. g. cross selling with complementary food products and offering free cheese tasting sessions. In

the past couple of years, for example, Mother Dairy has already been pursuing aggressive advertising strategies.

One successful promotion in Delhi and Mumbai was the "Cheese khao superhero ban jao" (Eat Cheese to become a Superhero) event, where kids buying cheese at retail outlets were invited for a photo-op - dressed as superheroes with a framed photograph presented to them. Another helped the company bond better with its retailers. In November 2005, retailers in Delhi displayed banners proclaiming, "Cheese ke saath bees ki cheez" (Buy Cheese and get Rs. 20 worth of freebies), a proposal where, if a consumer bought Mother Dairy cheese, the retailer would offer her free purchases worth Rs 20 from the store. Both these innovative campaigns were hugely successful in brand awareness and sales.

Conclusion: The study of this SWOT analysis shows that the 'strengths' and 'opportunities' far outweigh 'weaknesses' and 'threats'. Strengths and opportunities are fundamental and weaknesses and threats are transitory. Any investment idea can do well only when you have three essential ingredients: entrepreneurship (the ability to take risks), innovative approach (in product lines and marketing) and values (of quality/ethics). 5. Market Segmentation: In terms of market segmentation, all the Indian cheese brands cater primarily to the retail sector. On the other hand, Dabon International Private Limited and Bel Fromageries have a retail and institutional client focus.

The institutional sector, comprising fast food chains, restaurants, in-flight caterers and hotels also source their cheese from private dairy companies like Dynamix Dairy. Geographically, cheese is produced and marketed for <https://assignbuster.com/indian-cheese-industry/>

domestic consumption. Amul Malai Paneer is only cheese product exported to the Middle East, Singapore and North America. Paneer is targeted at the large Non Resident Indian (NRI) population in these countries.

6. Trends in the Indian cheese market

7. 1. Production patterns

The state cooperatives that market cheese like Amul, Mother Dairy and Verka have their own production plants and source milk from their cooperatives. Among international cheese companies, only Dabon Private Limited also produces cheese in the country, having its own plant in Noida, near Delhi.

The only significant private player, Britannia, does not make its own cheese but has it produced by the Maharashtra based private dairy company Dynamix Dairy Private Limited (which has a technical collaboration with Schreiber Cheese, USA). Bel Fromageries, the global French company that sells Laughing Cow and Kiri varieties of cheese in India, imports cheese into the country through its agent, Rai and Sons, Delhi.

7. 2. Consumption patterns:

Cheese consumption continues to be an urban phenomenon, with processed cheese and cheese spreads accounting for about 80% of the total cheese consumption. Also, cheese is mostly consumed by children and is yet to be part of the mainstream adult diet on a mass scale.

The product mix and consumption pattern in India is unlikely to change drastically in the next few years. The largest demand will continue to be for processed cheese and cheese spreads. Children will continue to be the largest consumers of cheese. Of the predicted increase in demand, children will contribute to the largest proportion in tier 2 cities while it will be adults in the metros. To cater to this increase, it is also likely that cheese producers introduce new varieties of specialty cheese in the metros.

7. Observations

1.

Increasing and Widespread Demand: Based on a multi-year study of dairy consumption patterns in China, Mckinsey predicts a growth in the demand for Cheese by 40% by 2011.

With India having similar consumer trends- namely, growing incomes, westernization and urbanization - Indian demand is likely to mirror Chinese patterns. Two conspicuous outcomes are: i) There is likely to be a 25%-30% increase in demand in the metros and ii) There is likely to be a 5%-10% growth in demand in tier 2 cities as urbanization and modern consumption patterns extend to these cities. 2. Food technology improvements: In the next 3 years, regional players will be forced to adopt new technologies that enable them to go national to survive. 3. Indianization of processed cheese: The next three years will see new Indian flavours of cheese being introduced in the processed cheese and cheese spread market.

The Indian consumer has unique tastes with variations even across regions. Both Indian and International brands are likely to 'Indianize' their cheese products with Indian flavours to attract a larger customer base. 4. Consolidation of Cheese Plants: The explosion of retailing in India will probably have a significant impact on the cheese industry. Large chains of supermarkets that have entered the country, like Tesco, would follow their global policies of tightening supplier margins that could put small cheese producers out of business. The supplier end will likely be dominated by huge national producers who can achieve sufficient economies of scale to be able to afford low margins.

There will be a few such national cheese factories, supplying to various cheese marketers and retail chains, who in turn brand cheese under their

own labels. There is also a high probability that cheese importers like Kraft and Bel Fromageries begin domestic production to lower prices and increased availability of their products. 8. Summary The organised cheese industry in India is at best in its nascent stage, accounting for less than 1% of total dairy production and largely limited to urban consumption. The organized cheese industry in India as of 2006, is valued at Rs 250 crore (US\$ 50 million), with a volume in excess of 8000 tonnes. The industry growth rate is estimated at about 10%-12% per year in terms of volume and 16%-17% per year in value terms.

Current household cheese penetration is 5%, with about 50% of consumption being limited to cities. Mumbai and Delhi together capture half of the cheese market. Within cheese products, around 60% of the market is dominated by processed cheese, 30% by cheese spreads and the remaining 10% by flavoured and specialty cheese. Amul and Britannia Milk Man are the lead brands. Overseas cheese producers are eyeing the Indian market for its huge promise. The explosion of retailing in India is expected to have its impact on the cheese industry also. This paper looks at the lead national and regional players as well as the consumption, production and marketing trends. 9. Key government contacts:

Government Department| Responsibility| Contact Information| Ministry of Agriculture, Department of Animal husbandry, Dairying and Fisheries (DADF)| The Department is responsible for matters relating to livestock production, preservation, protection from disease and improvement of stocks and dairy development, and also for matters relating to the Delhi Milk Scheme and the National Dairy Development Board. | The Secretary, Telephone:+91 11

23382608 Email:in| National Dairy Development Board (NDDB)| A government organization, NDDB is the apex body of State cooperatives. Also provides training and consulting services. | Head Office: P. B. No. 40 Anand - 388 001 Gujarat, INDIA Telephone: 91-2692-260148/260149/260159/260160 Fax: 91-2692-260159/260165 Email: coop|

Ministry of Food Processing Industries| The main central agency of the Government responsible for developing a strong and vibrant food processing sector; with a view to create increased job opportunities in rural areas, enable farmers to reap benefit from modern technology, create surplus for exports and stimulate demand for processed food| The Joint Secretary, Telephone: Ph. : 011-26492476 Fax: 011-26493228 Email: in| 10.

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