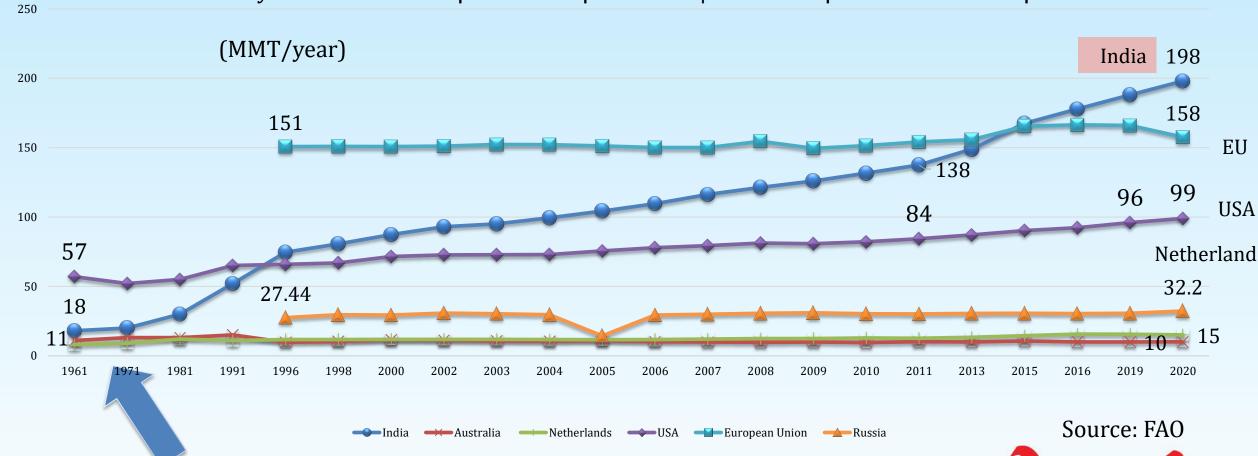


#### Milk production status since last 60 years

CAGR of last 15 years: India: 4.9% | USA: 2.3% | EU: 1.3% | AUS: 0.5% | Netherland: 2.7% | world: 1.9%



Milk production of India, Australia and Netherlands was almost similar

## Amul ensures that 80% - 86% of consumer's rupee goes back to its dairy farmers

#### India

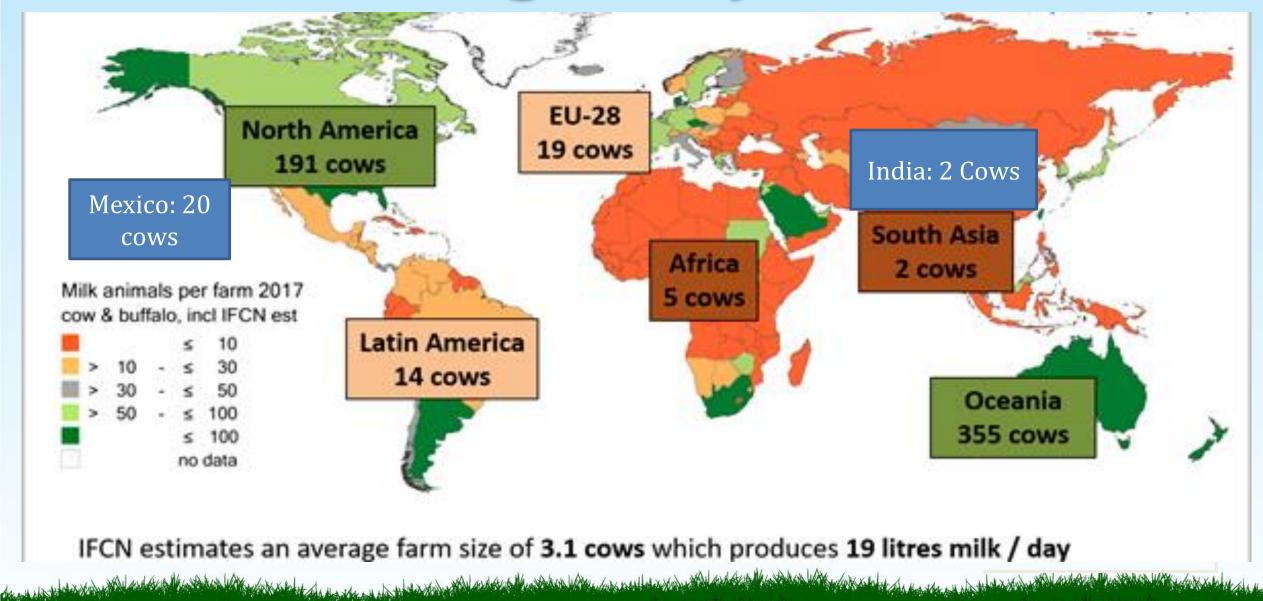
Indian dairy cooperatives ensure that their farmers get 80%-86% of Consumers Rupee spent on Milk & Milk Products

#### NZ, AUS and EU

In NZ, producers get 30 % of consumers' money spent on Milk and Milk products while in the Australia and in EU, producers get only 27% and 40% respectively.



### Average dairy farms



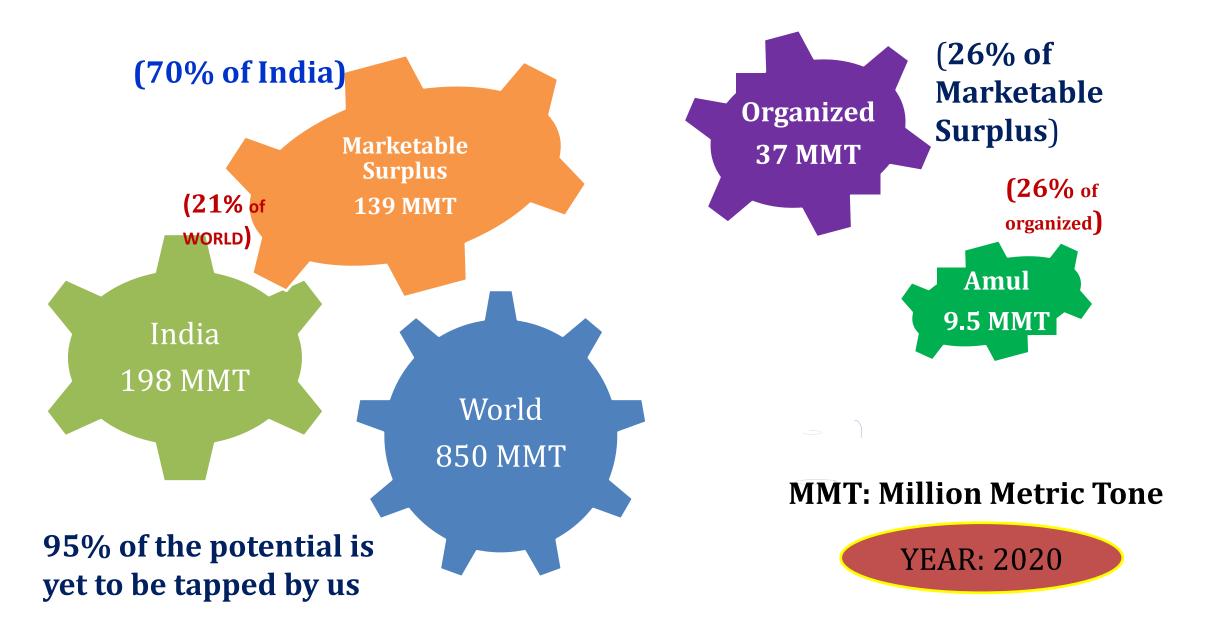
Indian dairy
Scenario...



28 State **GCMMF** in MARKET Model Amul Fedns. in Gujarat India **SALES SALES REVENUE REVENUE** STATE MILK FEDERATION MILK MILK **PRODUCTS** 250 District 18 District Addl. **Rural Health Bonus Unions in Cattle Feed Unions** in **Price Schemes** India Gujarat Diff. Dividend on **DISTRICT MILK UNIONS Shares** Vet. & AH MONEY MILK MONEY 18,565 VDCS in Services 1,90,000 VDCS **Gujarat** in India **VILLAGE DAIRY COOPERATIVE SOCIETIES** 3.6 million in 17.1 million in Gujarat India AND WAR WAR WAR AND THE REAL PROPERTY OF THE PARTY OF THE Comment of the second of the s **PRODUCERS** 

MEMBER

#### Milk production and processing scenario



#### Amul's Scale



25 Million Litres Milk
Procurement/ Day
from 3.6 Million
Farmers



8<sup>th</sup> Largest Dairy Company in the World

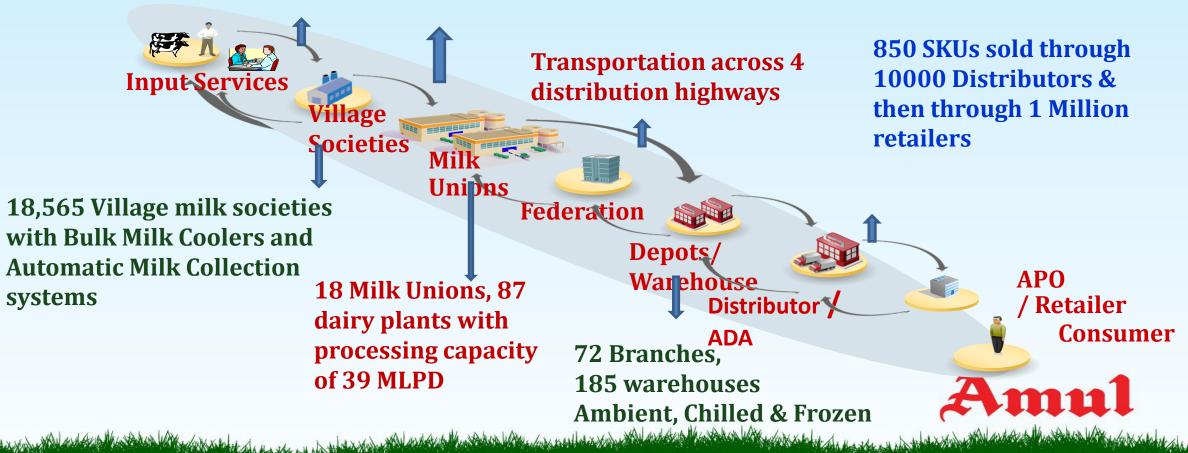


Rs 53,000 crore (USD 7.2 billion) brand turnover, India's largest food brand

7.2 Million transactions per day for milk procurement

Transportation of 26 million litres of milk per day, from 18,565 societies to 87 dairy plants twice every day

# Amul's Supply chain management & use of Information Technology

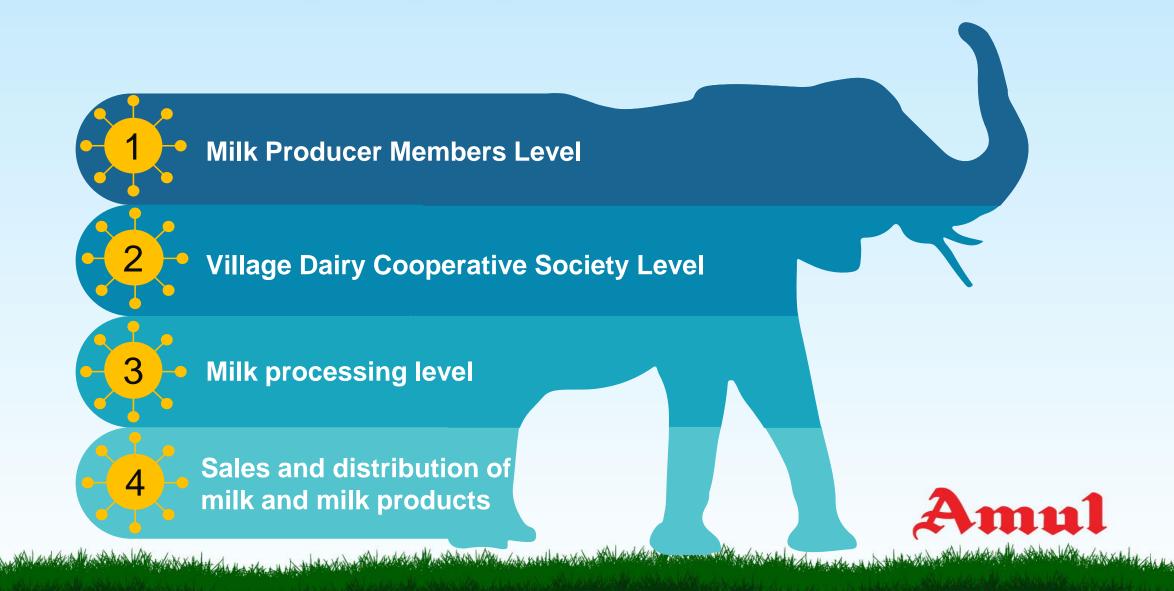




Initiatives taken during Pandemic to maintain supply chain



#### Amul: Initiatives by dairy cooperative value chain during lockdown





#### Milk Producer and Milk Procurement Level





#### ખેડા જિલ્લા સહકારી દૂધ ઉત્પાદક સંઘ લિ.

નં.એમડી / વહીવટ / જ.નં. પઝ

dl. 28/03/2020

મેનેજિંગ કાર્રકટર 24

પ્રતિશ્રી, ચેરમેન / સેક્રેટરી સંઘ સંયોજીત સઘળી દૂધ મંદળીઓ જોગ.

વિષય : કોરોના વાઈરસ અંતર્ગત સરકારશ્રીની માર્ગદર્શન મુજબ દૂધ મંડળીના કલેકશન બાબત.

સવિનય ઉપરોક્ત વિષય અન્વયે સંઘ સંયોજીત સઘળી દૂધ મંકળીઓના તમામ પ્રતિનિધિઓને જણાવવાનું કે હાલમાં "વૈશ્વિક સ્તરે" કોરોના (COVID-19) વાઈરસની મહામારી કેલાયેલ છે જે અંતર્ગત સરકારથી ઘ્વારા તકેદારીઓ રાખવા માટે વિવિધ પરિપત્રો, જાહેરાત, પ્રેસનોટો ઘ્વારા અવાર–નવાર માહિતી પુરી પાકવામાં આવતી હોય છે. જે અંતર્ગત દ્વારા સરકારથી ઘ્વારા નિયત ESSENTIAL COMMODITIES માં આવતું હોય દૂધ મંદળીઓ ઘ્વારા દૂધ કલેકશન તેમજ સપ્લાય એકમાં સાવચેતી સાથે ચાલુ રાખવતું અત્રેથી જણાવવામાં આવે છે તેથી કોઈપન્ન અક્વાઓથી ગેરમાર્ગે દોરાવું નહી. આ ઉપરાંત તમામ દૂધ મંદળીઓએ નીચે મુજબની બાબતોનું ખાસ ઘ્યાન રાખવું જેથી કોરોના વાઈરસને કેલાતો અટકાવી શકાય.

- મંડળીમાં દૂધ ભરવા આવતા તમામ દૂધ ઉત્પાદકોને દૂધ ભરી તુરંતજ પોતાના ઘરે પહોંચી જવા માટે જણાવવું તેમજ મંડળી સ્થળે વધુ દૂધ ઉત્પાદકો એકઠા થાય નહી તેની તકેદારી રાખવી તેમજ શકય હોય તો દૂધ ઉત્પાદકોને એકી સાથે દૂધ ભરવા ન બોલાવતા અલગ અલગ સમયાંતરે બોલાવવા.
- ૨. કોઈપણ દૂધ ઉત્પાદકને ખાંસી અથવા શરદી હોય તો મો ઉપર રૂમાલ કે માસ્ક પહેરવાનું સૂચન કરવું.
- મંકળી ઉપર હાથ ધોવા માટે કેટોલ સાબુ, સેનીટાઈઝરની વ્યવસ્થા કરવાની રહેશે તેમજ મંકળીના કર્મચારીઓએ દૂધ કલેકશન સમયે ટોપી, માસ્ક પહેરવા.
- કોઈપણ વ્યક્તિને તાવ અને ખાંસીના લક્ષણ હોય તો તેનાથી સુરક્ષિત અંતર ઓછામાં ઓછું ૧ મીટર અંતર રાખવા જણાવવં.
- પ. મંડળીઓના તમામ સાધનો એસ.ય.૩૨૧ તેમજ રોજ કલીન પાણીથી ધોવાની કાળજી રાખવી.
- ૬. મંકળીઓ કે દૂધ ઉત્પાદકોને દૂધ સંઘનું કોઈપણ કામ હોય તેવા સમયે જો જરૂરીયાત ન હોય તો ચિલિંગ સેન્ટર તેમજ ઓફીસ પર આવવું નહી કોન મારફત જ કામ ચલાવવાનો આગ્રહ રાખવો.
- ૭. દૂધ મંકળીએ અનિવાર્ય સંજોગો જેવાકે મિલ્કો ટેસ્ટીંગ મશીન રીપેરીંગ, બેંકીંગ કામ વગેરે અર્થે સંઘ, ચિલિંગ સેન્ટર કે બેંકની મુલાકાત લેવાના સંજોગોમાં જવું પઢે તેમ હોય તો દૂધ મંકળીએ પોતાના લેટરપેક ઉપર જે તે કારણ લખીને જવું જેથી રસ્તામાં જે તે અધિકારીને કામ અર્થેનો યોગ્ય ખુલાસો આપી શકાય.
- ૮. દૂધ મંડળીઓ આઈ.એસ.ઓ.ના ધારાધોરણ મુજબ કામ કરતી હોય તમામ દૂધ મંડળીઓએ ટોપી, માસ્ક, એપ્રોન, સેનેટાઈઝરનો કરજીયાત ઉપયોગ કરવા ભલામણ છે. ટોપી–માસ્ક, એપ્રોન કે સેનેટાઈઝર સંઘના સ્ટોર વિભાગમાંથી સ્ટોક આવેથી આપ ખરીદી શકશો.

ઉપર મુજબ જણાવેલ બાબતોનો અમલ કરીને કોરોના વાઈરસને વ્યક્તિગત ફેલાતો અટકાવવામાં મદદરૂપ થવા ખાસ ભલામણ છે. વધુમાં દૂધ એ માનવ જીવન જરૂરીયાતની વસ્તુ હોય આપ સર્વેનો દેશની સેવામાં જે સેવા પ્રદ્યાન કરેલ છે તેની નોંધ ગર્વ પૂર્ણ લીધેલ છે.

''જાતે રહો સુરક્ષિત, બીજાને પણ રાખો સુરક્ષિત''

આણંદ ૩૮૮૦૦૧ • ફોનઃ ૦૨૬૯૨-૨૫૬૧૨૪ • ફેક્સઃ ૨૪૦૨૨૫

Necessary advise and instructions for milk producer members and Village Dairy Cooperative Society was circulated.



તાં, મેઘરજ, જી. અસ્વલ્લી

#### **Posters display**

(Highlighting precautions need to take against COVID – 19 pandemic was put up at various locations in village cooperative societies)











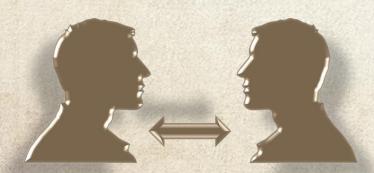


## VDCS had distributed Face mask, Hand sanitizers, hand gloves etc.

Regular thermal scanning of milk producer

Started following social distancing rules during operation

Milk producer member were allocated different time slot for pouring milk at Village Dairy **Cooperative Societies to** avoid crowd and maintain social distancing.







Installation of sanitization tunnel at VDCS to sanitize milk producers





Educated farmers regarding use of Tulsi, Brahmi, Fudina and other medicinal plants and arranged for distribution of immunity booster herbal mix to combat COVID – 19 outbreak



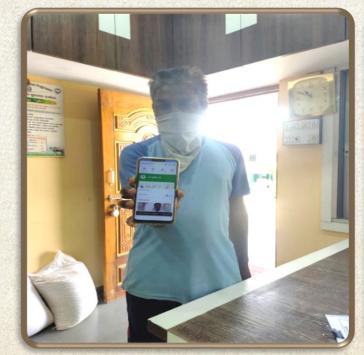


Milk producer member were informed and suggested to download Aarogya setu mobile application of GoI to track corona positive case nearby them and also fill-up their symptoms details.











## Staff of village Dairy Cooperative societies were provided with PPE kit





## Veterinarians were using PPE kit for providing doorstep veterinary services to milk producers







#### Milk processing level



Sanitization and Thermal screening of every individual enters in the dairy premises











## Installation of sanitization tunnel at dairy plant









## Arrangement of Lunch / Dinner / refreshments for drivers/contractual employees.







## Disinfection of all the vehicles entering and leaving the dairy premises







Obtained necessary permission from respective state Government authorities and displaying the same on each vehicle engaged in supply chain.





## Sales and distribution of milk and milk products



#### Short video released to avoid panic buying of milk

appealed to all the consumers to avoid panic buying of milk and milk products and assured abundant availability and supply of milk.

Video was shared in Amul YouTube Channel, Amul Facebook, Twitter and Instagram in order to reach to the maximum consumers.



## Set up of Stalls/Delivery points at various Housing complexes











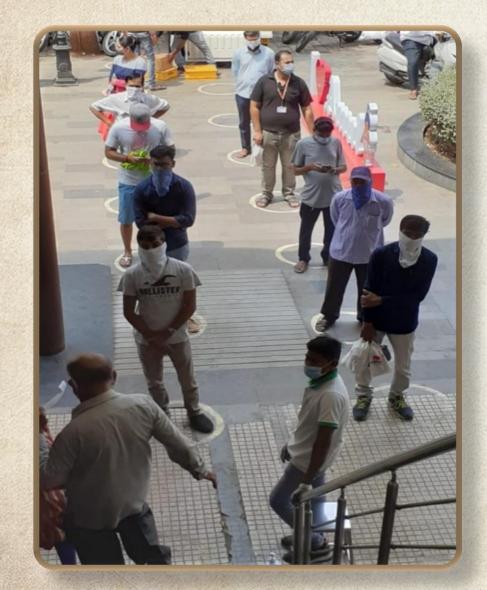


#### **Delivery of Milk at door step**





## Social distancing at Amul Parlour





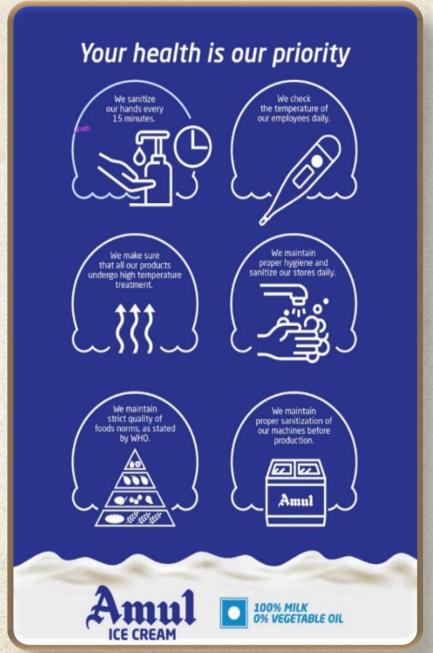






Displayed poster regarding precautionary measures to be followed at Amul Parlours







#### Mass awareness about COVID 19 - Message on pouch milk film





PASTEURISED FULL CREAM MILK

#### Net Content:

#### 500 mL

NUTRITIONAL INFORMATION per tillig (approx. values)			
Energy, kcal	86.4	Total Carbohydrate, g	50
Total fat, g	6.0	Added Super, g	50
Saturated Fat, g	3.9	Protein, ş	31
Trans Fat, g	0	Calcium, mg	1980

Keep Under Refrigeration

Lic. No. 10012021000071

FOR BEST RESULTS, STORE a CONTINUOUSLY UNDER REFRIGERATION BELOW 8°C UNTIL "USE-BY DATE"

For Batch No. [B] / MRP (incl. of all taxes) & Use By Date, see printing on front panel / near the address panel





Packaging Film Plant - Gendhinager GPC8 Reg. No. GPC8/PWR/GNR/14/2011

Annul The Tisse of India

**₹3131€4.** The Taste of India



SHIP The lines of India Amul The Taste of India

The Tiste of India SHEET The Laste of India

Amul The Taste of India The laste of India

34465 The Taste of India Amul The Tasse of India

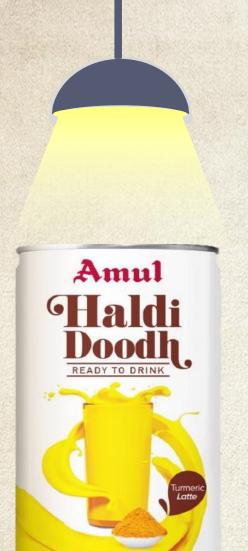
CHIEF The Tests of India 344(25 The liste of India Amul The Taste of India **2013(C)** The Tisse of India

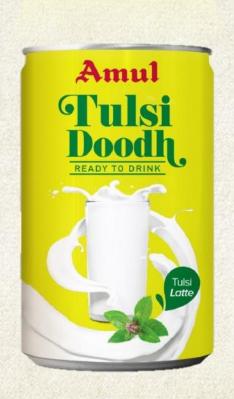


To identify the manufacturing unit address, read the first two characters of the Batch No. and see below:

- AA AHNEDABAD DISTRICT CO-OPERATIVE WILK PRODUCERS' UNION LTD., AHMEDABAD - 380 021 Lic. No. 10012021000049
- AN AHMEDABAD DISTRICT CO-OPERATIVE MILK. PRODUCERS' UNION LTD., NAUAPURA, AHMEDABAD - 382 210 Lic. No. 1001802100304
- BA BANASKINTHA DISTRICT CO-OPERATIVE MILK PRODUCERS' UNION LTD., BANAS DARRY. PALAMPUR - 385 001 Lic. No. 10012021000268
- CA BHAVAGAR DISTRICT CO-OPERATIVE MILK PRODUCERS UNION LTD., SARVOTTAM DARRY. AT SHIHOR, BHAMAGAR-RAJKOT ROAD, DIST, BHAVNAGAR - 364 240 Lic. No. 10012021000320
- EA SUPENDRAWAGAR DISTRICT CO-OPERATIVE MEXIFFICIDACENS UNION LTD., SURSAGAR DARRY, PLOT NO. 249, GLD.C. PHASE-2, AMBANNOX, WACHMAN - 363 035 Lic. No. 10012021000279
- FA. SHREE SMAU JUNAGACH DISTRICT CO-OPERATIVE MILK PRODUCERS UNION LTD. KOHOKOWARADA, URNITHALL, JUNAGADH - 362 215 Lic. No. 100180210003377
- GA AMJUFED DARRY (A UNIT OF GOMMF LTD.), PREVIOUSLY KNOWN AS MOTHER DARRY. GANCHINAGAR), BHAT - 382 408, DIST, GANDH Lic. No. 10012021000251
- PRODUCERS UNION LTD., BHARUCH 382 982 Lic. No. 10012021890274
- HS MAHAGIT AGRO PVT. LTD., LAMBOLA, TIKLUKA SHAHADA, NANEKIRBAR (MRHARASHTRA) - 425 439 Lic. No. 11518030000571 FOR BHARUCH DISTRICT CO-OPERATIVE MILK PRODUCERS' UNION LTD., BHARUCH - 362 952 Lic. No. 10012021000274
- PORSANDAR DISTRICT CO-OPERATIVE MILK PRODUCERS' LINION LTD.; SURVEY NO. 43/PZ. 43°P4, 43°P5; OPP, SWAMPARASIA MAKER DEVDANAKA, KUTTHANA; PORBANDAR - 362 650 Lic. No. 10018021003272
- PRODUCERS UNION LTD., AMR DARY AT AMPELI DHARI ROAD, AMPELI - 365 601 Lic. No. 10012021000503

- 1800 258 3333 (Toll free) I5 AM 9 PM
- GCMMF Ltd., Anand 388 001







**New Product launches (immunity boosters)** 

### New TV Campaigns - Amul UHT Milk - Immunity milk



## Amul: Covid'19 Advertising Strategy

While most advertisers were reducing media investments, we substantially increased Amul's SOV.

Increased presence on high viewership genres News, Movies presence due to the surge in OTT content consumption

Moved from physical Print to digital E-papers And delivered unprecedented media value by leveraging market softness

Lower rates

Upgrades, sponsorships, specials, higher PT skews, higher bonusing /space

Higher ratings with low clutter

# **Amul Topicals released during Covid-19**















# Ramayan and Mahabharat on DD



# SPOTTING CHANGING MOOD, AND OPPORTUNITY TO CONNECT

- Reminiscing better days
- Missing loved ones
- #Throwback

AMUL SPONSORED RAMAYAN & MAHABHARAT
Riding on nostalgia





Increased duration of ads. Telecast '80s ads on Retro Sundays'

The shows went on to deliver record TVRs in Hindi (Urban markets) – 12.5 TVRs – FEMALE

10 times the ratings than of Indian Premium League (IPL) (Cricket tournament) match was recorded everyday on Ramayan and Mahabharat

Since 17<sup>th</sup> April 2021, 3000 Sessions of Facebook Live taking place everyday 2 billion minutes of content viewed in last 530 days and on average 1 Million minutes of content is viewed daily.











Extended support to city Police / cops - FPO had distributed umbrella to Corona Worriers (Police force)

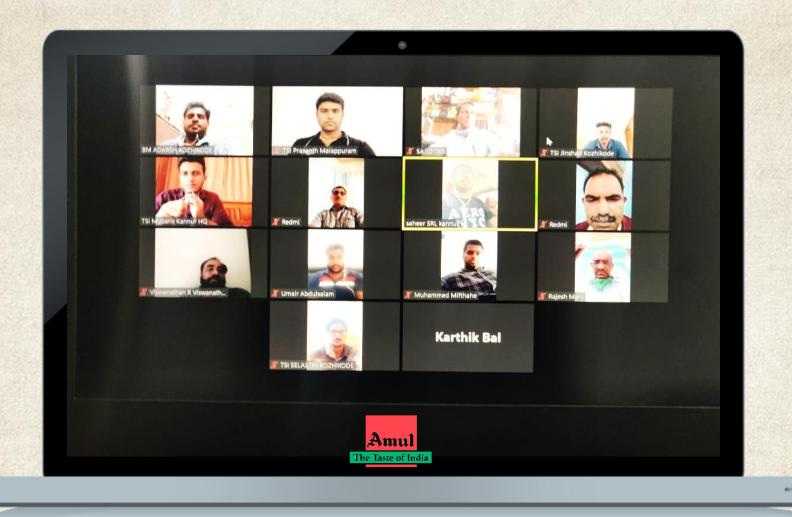






Milk products offered to Police force, security personnel and health workers by Amul distributors and retailers





Regular conduct of video conference meeting with sales team to facilitate smooth supply of milk and milk product.



For First 100 days of pandemic, Amul cooperatives have converted the crisis into an opportunity.

We procured an additional 4.0 million litres of milk per day (17%), which means, we have given around USD 150 million extra to the rural milk producers.

### **Pillars of Sustainable Dairy Value Chain**



**Environment** 



**Customers** 

- Affordable nutrition
- Taste

Livelihood

Milk **Producer Members** 



• Environment protection

• Lesser methane emission

• Food security (Self

**Nutritional security**)

Sufficiency &

Employment

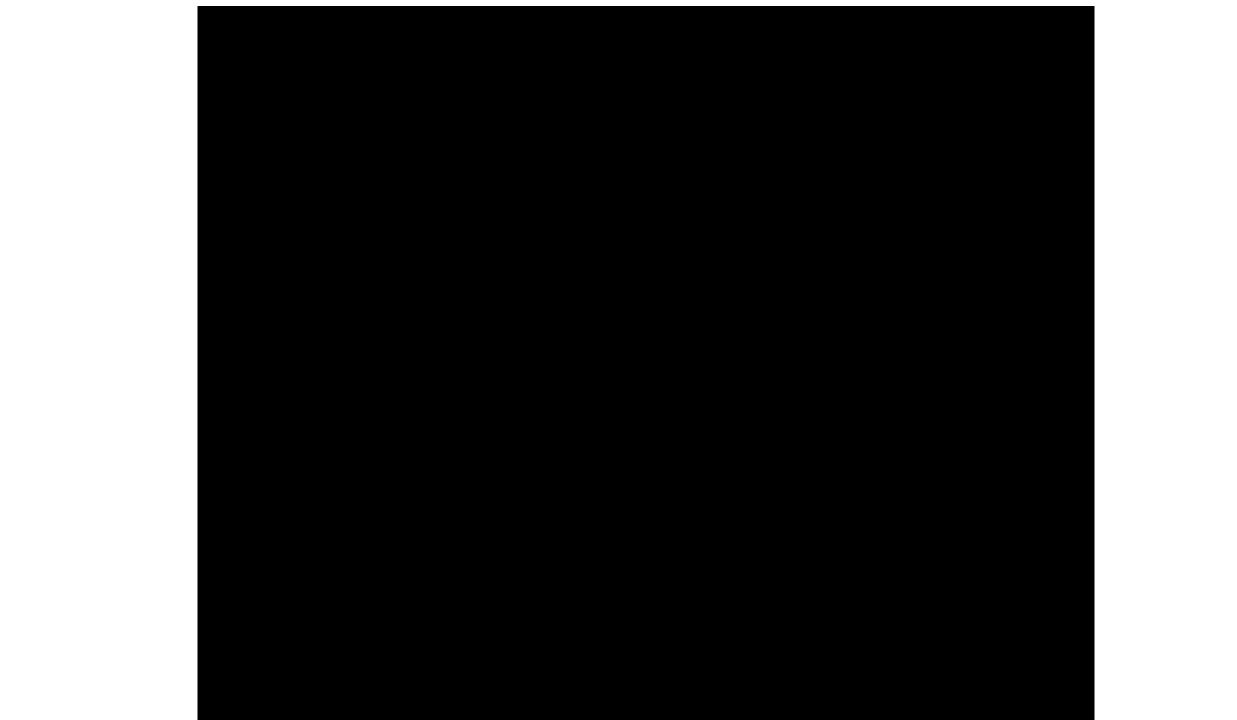
Sustainable Development

- Profit maximization
- Business expansion



**Countries** 

**Industries** 



# THANK YOU sodhi@amul.coop