

Safal[®]

honey

100% Natural



Mother Dairy Fruit & Vegetable Private Limited

Corporate Office: A3 ,Sector 1, Noida – 201301

www.motherdairy.com

How relevant is honey(bees) to Mother Dairy?





Tulsi- honey

Mustard growers –
Mono-flora Honey



Milk & honey



Apple growers pay
for keeping bees
boxes- pollination

Lemon & honey



Any body can make soap, but we know how to sale soap- HUL



Honey is made naturally by bees but selling honey is difficult.

There are more technology available on adulteration then honey making.



Therefore, our focus is on PURITY.

Past history of honey at SAFAL booth

SAFAL sold “Jeevan Amrit Honey” in the booths between 2011 to 2014 with sales ranging from 2- 5MT volume & 4-10L /annum.



We did not had great understanding on honey then & never had marketing activities around it

- Mother Dairy is committed to farmers welfare and in providing Quality products to consumers. One of the mandate in this regard given to us was to launch honey which is **Natural & pure** and benefits both **Farmers & Consumers**
- **Safal Launched 100% Natural Honey in Record 1 Month Time!!!**

Mid- Sep
2016

- Got Mandate to launch honey

- Safal Team met **Dr. B. L. Saraswat** (Executive Director, NBB) to get inputs on the honey launch
- With Inputs from Dr. Saraswat , Safal created USP of Safal Honey “100% Natural Honey Extracted from sealed Honey Combs”

- **National Bee Board** helped us with the list of Honey Beekeepers groups/manufacturers who have expertise in honey sourcing
- Creative Agency Briefed on Safal USP to create packaging

- Manufacturing Plant visit and approval
- Packaging Material developed

Oct 2016

- Safal 100% Natural Honey Launched at Safal F&V Booths on **29th October**

Dec
2016

- Subsequent launched in Milk Booths & GT channel
- Consumer Feedback

/10/2017



Safal 100% Natural Honey

USP :

- Extracted from Sealed Honey Combs
- Qualifies FSSAI, CODEX & European Union Standard





"Safal 100% Natural Honey tastes better than Patanjali & Dabur"
- @Krackerjack Carnival

- "Consumer perception is Honey= Dabur."**
-@F&V Booth

"Consumers normally purchase honey in bulk i.e 1 kg pack for kids. After tasting Safal Honey they told next time they will opt for Safal Honey."
@ Krackerjack Carnival

"Safal Honey tastes better than the other brand available in the fair.(Organic Honey is very sweet)."
@ Krackerjack Carnival

"Prices are high as compared to Patanjali and Dabur"
- @F&V Booth

Booth Concessionaire Speak:

"People prefer Patanjali and Dabur more than Safal as they are cheaper and well known honey brand. However, consumers who have bought Safal Honey have returned with positive feedback and repurchased it. **The taste of Safal Honey is good**"





Smooth Flavor, Right amount of sweetness & Flavor. It's Thick

Takes longer to melt than Patanjali. I think it's more pure

It's not so sweet, so it may be pure

Competition Size & Share

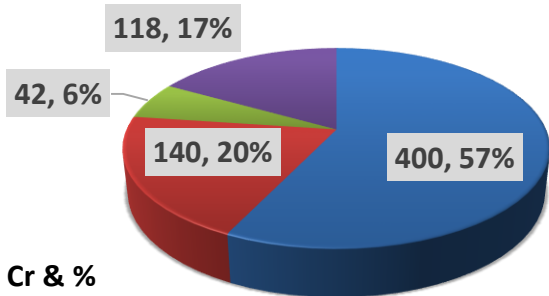


Fig in Rs Cr & %

■ Dabur ■ Patanjali ■ Lion ■ Others(69 brands)

Region wise MRF sale(Rs Cr)

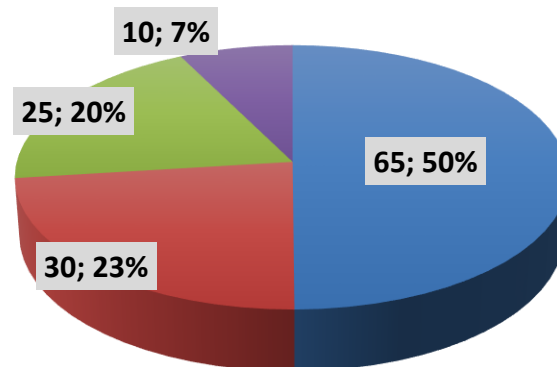


Fig in Rs Cr & %

■ South Zone ■ West Zone ■ North Zone ■ East Zone

Year 2016 (MAT Sept)	MT	Rs Cr	% Share
Total Honey Market	20,198	700	100%
MRF	3751	130	19%
GT	16,447	570	81%

- Total Honey Market is Rs 700 Cr, growing by 10%
- 3 Brands (Dabur, Patanjali & Lion) contribute 80% of the total sale...Dabur Honey leading with 57% Share.
- Zandu, which has become active in recent times is Rs 2.5 Cr in size (0.42 Cr in MRF)
- South region is the major contributor (50% of the total sale)

Markets

Initially focus in Delhi NCR & Bangalore



Delhi

Reason for Selection

- North & South → 70% of the Honey Market
- Strong Safal Brand Name
- Good Distribution



Bangalore

- 70% of the Honey Market comes from South & North (South 50% & North 20% share)
- Safal has strong brand name in North(Delhi) & South(Bangalore) , hence want to focus these Markets in phase 1 (Launch phase)

SKU / Mix	wt (g)	MRP (Rs)	Rs/ g		wt (g)	MRP (Rs)	Rs/ g
Dabur	250	122	0.49		500	199	0.40
Patanjali	250	70	0.28		500	135	0.27
Safal	250	100	0.40		500	175	0.35



Dabur honey is darker in color whereas Safal Honey looks vibrant.

Competitive Scenario:

- Dabur is giving extra grammage offer (outside pack) [e.g. with 250g SKU, 50g SKU is free]
- Heavy advertisement by Dabur & Patanjali in the market (Details in next slide)

Patanjali spends 36% of it's Honey turnover (140 Cr on Media).
Dabur spends 5% of it's turnover (400 Cr)

- The category spends has gone up by 4 times v/s LY
- Print is approx. 70% of the spends
- Patanjali, Emami & Dabur the key advertisers – Rs50Cr, Rs24Cr and Rs19Cr respectively of the total Rs96Cr media spends

- **Safal intends to spend Rs 5 Cr on Honey advertising in Print, Radio & TV media. The majority to be in Print**

YD 2 Feb 2017				
SKUs	Vol (MT)	Val (Rs L)	Mix%	Outlet Nos
250g	11	38	58%	1100
500g	9	27	42%	711
Grand Total	20	65	100%	1100

Safal VAP Launched 100% Natural Honey on 29th Oct 2016 from F&V Booths. Later it was launched in Milk Booths as well.

We have started placement in general trade market too.

Total Placement : 1100 Outlets

- Total Honey Market size is 700 Cr growing at 10% YOY
- Ambition:
Be a significant brand by aiming for 1.5% market share in 17-18 and 5% market share by FY 19-20

FY	Vol (MT)	Val (Rs Cr)	Market size(Rs Cr)	Safal Honey M.Share%
2016-17 (5 Months)	50	1.0	700	-
2017-18	503	10	750	1.3%
2018-19	1238	25	825	3.0%
2019-20	2269	45	908	5.0%

Visibility & Placements



**Honey BTL
Activation at
Krackerjack Carnival**



Large Danglers



Booth Placements

Print Media Campaign



Visibility tools



Large Dangler



Banner



Table Top Dispenser

Safal Honey Way Forward

Aggressively Drive GT through trade incentive schemes

Create Awareness about Safal USP through

- Radio Campaign
- Social Media Campaign
- Print Media

Increase trial through

- Sampling at stores

Launch new SKUs

- Honey Squeezy pack
- Honey Sachet for Institutions
- Safal Honey Bread Spread



Sampling Unit

How we are defending our “Positioning” stand?

Honey- FSSAI Definition



“Honey is the natural sweet substance produced by honey bees from the nectar of blossoms or from secretions of plants which honey bees collect, transform & store in honey combs for ripening. Honey shall be free from any foreign matter such as mould, dirt, scum, pieces of beeswax, the fragments of bees and other insects and from any other extraneous matter.”



We want to ensure that it remains natural.



Properties of Honey



Antimicrobial Properties

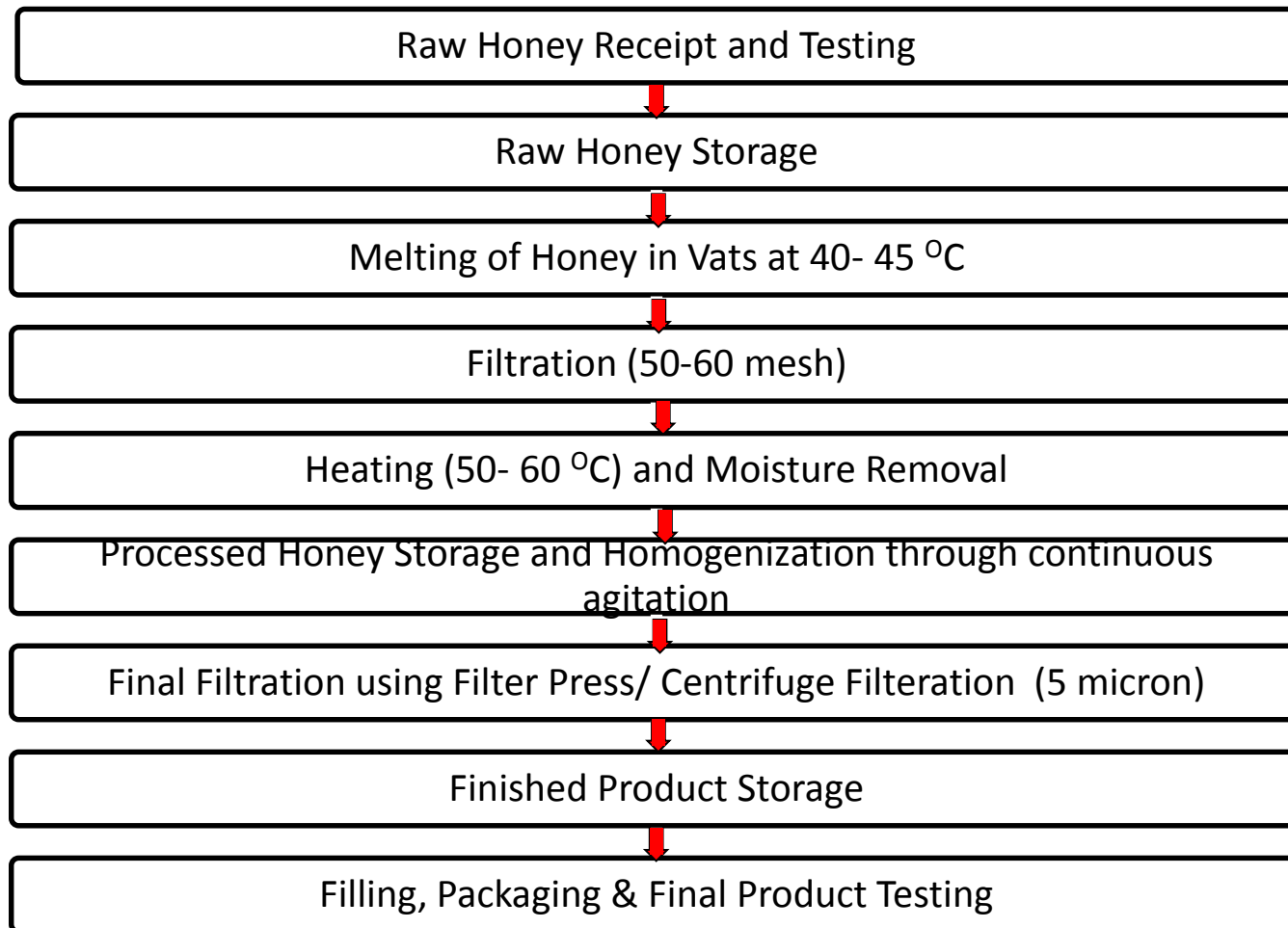
- Natural food preservative
- Reduce enzymatic browning in fruits & vegetables and prevent lipid oxidation in meats
- Flavonoids in honey- caffeic acid and ferulic acid are the contributors for antibacterial activity

Antioxidant Properties

- Honey- A sources of dietary antioxidants due to presence of variety of phytochemicals (organic acids, vitamins, and enzymes)
 - Antioxidant type and amount depends upon the floral source
- Darker honeys shown higher antioxidant content than lighter honeys

**** At >80% Sugar content no microbes can survive in Honey**

Process control in manufacturing



- ❑ Honey being hygroscopic in nature shall be processed as soon as possible after removal from hive

It was critical for Mother Dairy to understand Quality & Food Safety of Honey

- Honey is highly valued & is also prone to spurious & adulteration
- FSSAI & EU and other global standards were studied
- Check for various adulterants were critical

Mother Dairy standards are stringent w.r.t. Global Standards

Parameters	FSSAI	Mother Dairy	CODEX
Color	Light Amber (Light Brownish)	Light Amber (Light Brownish)	Colorless to dark brown
Taste	Sweet, free from objectionable & foreign flavors	Sweet, free from objectionable & foreign flavors	Sweet, free from objectionable matter, flavor, aroma, or taint
Moisture % w/w, Max.	25%	19%	20%
Specific gravity at 27°C, Min.	1.35	1.35	NA
Acidity (Expressed as formic acid) % w/w, Max.	0.2%	0.2%	Free acidity may be not more than 50 mill equivalents acid per 1000g.
Fructose /Glucose Ratio, w/w, Min.	Not less than 0.95 per cent by mass	Not less than 0.95 per cent by mass	Sum of Fructose and Glucose : not less than 60 g/100g
Total Reducing Sugar % w/w, Min.	Not less than 65.0 per cent by mass	Not less than 70 per cent by mass	NA
Ash, % w/w, Max.	0.5	0.5	NA
Fiehe's Test	Negative	Negative	NA
Sucrose, % w/w, Max.	Not more than 5.0 per cent by mass	Not more than 5 g/100 g	Not more than 5 g/100g
Hydroxy Methyl Furfural	Not more than 80	< 60	Honey/ blends from tropical ambient temperature countries: <80 mg/kg.

Test of critical physical & chemical parameters

- ❑ Mother Dairy standards for Moisture Content, Total Reducing Sugar & Hydroxy Methyl Furfural Content are most stringent amongst all Global Standards
- ❑ Parameters like Color, Taste, Specific Gravity, FG Ratio, Ash% & Fiehe's Test are not specified by EU but are covered under Mother Dairy and FSSAI standards
- ❑ Apart from these, parameters like Heavy Metals, Crop Contamination, Antibiotics, Pesticide & Insecticide Residues are also covered in Mother Dairy standards

Adulteration in Honey

The adulteration of pure honey with synthetic honey is prevalent and difficult to identify (particularly with cheap high fructose corn, cane & rice syrup)

New analytical techniques based on IRMS (Isotope Ratio Mass Spectrometry) is developed for the detection of corn, cane & rice sugar adulteration of honey

Authenticity Test Parameters

- ☐ Authenticity Test of Honey is done to check for any kind of adulteration like sugar syrup etc.
- ☐ Authenticity Standard specified only in Mother Dairy Standards as given below, no other standard specifies it

Parameters	Mother Dairy Specs
Authenticity Tests	To test honey for corn and rice sugar syrup adulteration.
a) C3 Test using IRMS	$^{13}\text{C}/^{12}\text{C}$ ratio, -22 to -33 ‰ in honey
b) C4 Test using IRMS	$^{13}\text{C}/^{12}\text{C}$ ratio, -10 to -20 ‰ in honey
c) Deviation accepted between honey and its associated protein extract	-1 ‰ deviation

****Every batch of Mother Dairy Honey passes through the authenticity test**

Thank you!
