

Study the “Pediatric Food Product Market in India
Competitive Insights, Developer Landscape and Potential
Product of The Market”

By

Suraj Sharma

*Dissertation submitted for the partial fulfillment of the
MBA Pharmaceutical Management*

Academic year, 2018-2020



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Acknowledgement

The fulfillment and euphoria that the successful completion of the project would be incomplete without mentioning of the people who made it possible.

I modestly owe the achievement of dissertation work to the omnipotent and my family whose affection and gifts will be with me in every moment of my life.

I might want to extend my sincere gratitude to Mr. Shyamal Sengupta (Vice President) and Mr. Rajesh Sharma (General Manager) RAPTAKOS, BRETT & CO. LTD. For giving me a chance to learn and develop professionally.

I also extend gratitude to my project guide Dr. Abhishek Dadhich (Associate Professor, IIHMR University, Jaipur) for his valuable suggestions, support and keen interest throughout the study that helped me in completing this work. I thank for the thought, expression and trust which was greatly bestowed upon me.

I might want to thank each one of the individuals who directly or indirectly helped me to complete this project work.

Finally, yet not the least, most significant I am grateful to the god who is the maker and chief of such starting and last modes to arrive at the predetermination.

Suraj Sharma

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About Organization Profile:



Raptakos, Brett & Co. Ltd.
PIONEERS IN NUTRACEUTICALS, SINCE 1930

Raptakos, Brett & Co. Ltd has been serving the medical profession globally, with a wide range of high-quality healthcare products for nearly 8 decades now.

Raptakos, Brett & Co. Ltd. was established in 1930 by two great visionaries – Mr. A. Raptakos & Mr. W.H. Brett, with the mission of serving the nutritional needs of people.

Over the past eight decades, the company has shown consistent growth and acquired a well-earned reputation for serving the medical profession and patients alike with a portfolio of innovative products.

Even today, this remains the guiding principle that propels us to innovate and excel in the field of pharmaceutical and nutraceutical formulations.

Manufacturing facilities complying WHO GMP Certifications along with other international standards are located at Thane, Roha, Karad, Chennai and Dahej. Our newest plant Dahej is a state-of-the-art facility dedicated for the manufacturing of vital range of nutritional products. It has completely automated system of operations. We ensure stringent quality control, quality assurance and well-regulated production practices.

The company also has a plant at Alwar for manufacturing intermediate products required in various formulations

All the company's products have been developed through intensive in-house R & D efforts. Our Research and Development laboratories have won recognition for their work from the Department of Science and Technology, Government of India.

Raptakos, Brett & Co. Ltd. has many firsts to its credit in terms of technology, products and innovations.

Research is focused primarily in the areas of nutrition and dietetics, APIs, pharmaceutical dosage forms and analytical methods.

Raptakos, Brett & Co. Ltd has been successful in developing an innovative and unique drug delivery system called the Diffusion Rate Controlling Membrane technology or DRCM technology.

This technology enables a single dose of a drug to be made available to the body over a 24-hour period in the required therapeutic concentration. The company has several products incorporating this technology.

Other pharmaceutical products cover several therapeutic groups such as Vitamin and Mineral supplements, Hematinic, gastrointestinal, digestive enzymes, NSAIDs and various other therapeutic categories.

The company has a wide range of nutraceutical products ranging from specialized infant foods for low birth weight as well as term infants and for lactose intolerant infants, supplements for pregnant women and lactating mothers, growing children, geriatrics and critically ill patients.

In the segment of Nutraceuticals – projected to grow dynamically, both internationally as well as in India – the company has established itself as a force to reckon with.

The company has an extensive distribution network comprising 24 branches spread all over India as well as branch offices in various countries.

Over 1000 field personnel serve the medical professionals throughout the country.

By focusing on this area and by launching products which are well accepted, the company is poised for quantum growth in the coming years.

Products

INFANT RANGE
Easifud
Lactodex HMF
Lactodex LBW
Lactodex NMW 1
Lactodex NMW 2
Lactodex 3
Lactodex Follow-Up Formula
Lactodex Starter Formula
Veelac
Zerolac

Table 1 Pediatric Product Range of RB

Services

Raptakos Brett Test laboratories are engaged in providing analytical services and solutions to various industries in the area of

1 chemical and instrumental analysis.

2 Microbiology and sterility testing.

SERVICES OFFERED

- Drugs and Cosmetics
- Foods and Beverages
- Veterinary Products
- Chemicals and Fertilizers
- Metals and Minerals
- Bulk Drugs and Elemental Analysis
- Dyes and Dye Intermediates
- Oils and Fats
- Soaps and Detergents
- Packaging Testing
- Water Testing
- Nutritional Supplements
- Bakery and Confectionery Products
- Milk and Milk Products

STATE OF THE ART INSTRUMENTS

- Liquid Chromatography – Spectra physics / Jasco (with UV Visible and RI Detectors)
- Gas Chromatography – Netel. (with Head Space Analyser)
- UV Visible Spectrophotometer – Shimadzu-UV-1700 (Band width less than 1 nm)
- Atomic Absorption Spectrophotometer- GBC-632B
- Infra-Red Spectrophotometer – Buck Scientific
- Dissolution Apparatus – Veego
- Potentiometric Titrator – Veego
- Karl Fischer Titrator – Veego
- Viscometer – Brookfield
- Flame Photometer

INTRODUCTION

Pediatric food is any delicate, effortlessly expended food other than breastmilk or newborn child equation that is made explicitly for human children somewhere in the range of four and a half year and two years of age. The food comes in numerous assortments and flavors that are bought instant from makers. Or on the other hand it might be table food eaten by the family that has been squashed or in any case separated.

The key players profiled in this report incorporates Nestle, Danone, and Abbott the primary chiefs in the Indian market.

As a worldwide general wellbeing proposal, the World Health Organization suggests that babies ought to be only breastfed for the initial a half year of life to accomplish ideal development, advancement and wellbeing. Most half year old newborn children are physiologically and formatively prepared for new nourishments, surfaces and methods of taking care of. Specialists prompting the World Health Assembly have given proof that presenting solids sooner than a half year builds infants' odds of disease, without improving development.

One of the wellbeing concerns related with the presentation of strong nourishments before a half year is iron inadequacy. The early presentation of corresponding nourishments may fulfill the appetite of the newborn child, bringing about less successive breastfeeding and at last less milk creation in the mother. Since iron ingestion from human milk is discouraged when the milk is in contact with different nourishments in the proximal little entrail, early utilization of integral food sources may expand the danger of iron consumption and weakness.

In Canada sodium content in newborn child food is controlled; stressed organic product, natural product juice, natural product drink, and grain can't be sold if sodium has been included (barring stressed pastries). Nourishments normally containing sodium are constrained to 0.05 - 0.25 grams per 100 grams of food, contingent upon the kind of newborn child food.

On the off chance that there is a family ancestry of hypersensitivities, one may wish to present just a single new food at once, leaving a couple of days in the middle of to see any responses that

would show a food sensitivity or affectability. Along these lines, if the youngster cannot endure a specific food, it very well may be resolved which food is causing the response.

Meeting the wholesome needs of newborn children as they develop is fundamental for their sound turn of events. Taking care of newborn children improperly or inadequately can cause significant sicknesses and influence their physical and mental turn of events. Instructive crusades that share data on when to present strong nourishments, fitting sorts of nourishments to take care of a newborn child, and cleanliness rehearses are successful at improving these taking care of practices.

Babies need an eating regimen of breastmilk or newborn child recipe. About 40% of the food vitality in these milks originates from starches, generally from a basic sugar called lactose.

As appeared in the 2008 Feeding Infants and Toddlers study, the general eating regimen of children and babies, the essential buyers of Pediatric food, by and large meets or altogether surpasses the suggested number of macronutrients.

As indicated by India Pediatric Food Market Overview, the Indian Pediatric food advertise is foreseen to speak to a CAGR of over 15% during estimate period. This report covers a point by point knowledge of the Pediatric food items showcase in the Indian market. The report covers the Indian Pediatric food advertise in a point by point segmental examination with the worth investigation. The report additionally covers the main organizations that are engaged with the assembling of the different Pediatric food items. The various brands and organizations engaged with the sorted out Pediatric food showcase in India are likewise broke down in this report.

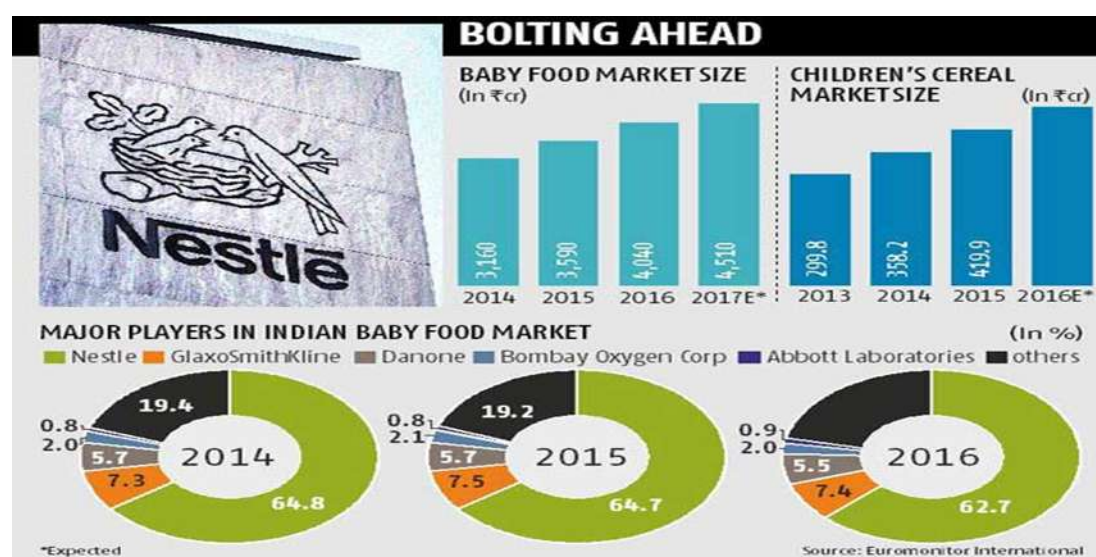
Furthermore, the report gives a thought on the item variation and evaluating investigation of every one of the items accessible in the Pediatric food showcase. Pediatric food is one of the quickest developing classifications in Pediatric consideration and generally FMCG industry of India. Pediatric food advertise is fragmented principally into newborn child milk equation, Pediatric grains, follow-up recipe. Every one of these items have seen huge development in the previous scarcely any years.

By and large, Pediatric food advertise is little when contrasted with other creating nations across Asia. In India, the market is to a great extent chaotic and non-natural Pediatric food is an

enormous section. The market is ruled by Nestle India which is working with its 6 Pediatric food marks in India. There has been seen exceptionally low entrance in natural Pediatric food class because of fewer players.

Nonetheless, the classification is required to develop with a quick stage attributable to expanding concerns regarding wellbeing fixings. As far as geology, south and north India establishing for bigger offer in Pediatric food advertise across India, though entrances levels in East India is the least.

Figure 1 Major Players in Indian baby food market



Goldstein Research expert predict that the India Pediatricfood showcase is set to reach almost USD 48.1 billion by 2024, developing at a CAGR of 6.3% over the predicted time frame (2017-2025).

Based on item type, grains based Pediatricfood fragment ruled the market with a portion of about 35.1% and it is firmly trailed by the milk equation section advertise that is relied upon to develop at a CAGR of 6.9% over the conjecture time frame. The pediatric Milk formula was the highest revenue segment accounting for \$25800 million in 2018 and is required to reach \$26000 million up to 2025, growing at a CAGR of 0.1% during the forecasted period. However prepared food segment would witness highest CAGR of 7.5 during the forecasted period to reach by \$28300 million 2020.

Literature Review

Infant formula crisis in china: a cohort study in sichuan province.

Tang L, Binns CW, Lee AH.

China has become the biggest market of baby recipe on the planet. A forthcoming partner study (n=695) was embraced in 2011 in Sichuan area of China two years after the melamine embarrassment. Newborn child taking care of practices and moms' conclusions on baby recipe use were reported in detail. An aggregate of 674 moms (97%) had started breastfeeding by release. Of the 21 moms who didn't start breastfeeding, 13 settled on choice to only take care of their children with newborn child recipe in light of hepatitis B infection disease. Almost 70% of babies got newborn child equation as their first feed, and the pervasiveness expanded to 88% inside one month. Having lacking breastmilk was seen by the lion's share (77%) of moms as the purpose for baby recipe taking care of. About half (46%) of the moms concurred with or were conflicted that baby equation taking care of doesn't decrease their breastmilk creation. More than 33% (38%) of ladies felt that detailed newborn children rest longer around evening time than the individuals who are breastfed. Taking everything into account, moms' suppositions seem to impact the utilization of baby recipe in China. There is a requirement for additional training on breastfeeding and newborn child taking care of alternatives to keep up and improve breastfeeding results in China.

Commercial 'ready-to-feed' infant foods in the UK: macro-nutrient content and composition: Zand N¹, Chowdhry BZ, Pollard LV, Pullen FS, Snowden MJ, Zotor FB. Quantitative examinations of the macronutrient substance of eight famous business 'prepared to-take care of' Pediatric suppers for 6-9-month old newborn children in the UK showcase have been attempted so as to find out their nourishing appropriateness comparable to the all-out day by day dietary admission just as wholesome profiling of the items. The substance investigations led included Kjeld Hal for protein, corrosive hydrolysis and extraction for fat, phenol Sulphur corrosive for starch and Association of Official Analytical Chemists 985.29 for fiber. The main contrast found between various assortments (meat-and vegetable-based) was regarding the protein content (P=0.04) per 100 g of food. The all out every day admission of fat (27.0 g every

day) - in light of the menu created from business correlative food - is proposed to surpass the day by day suggested values for fat (31%), if the admission of tidbits and pastries are fused. These discoveries suggest that the plan of plans, in light of a standard business menu, is a significant thought comparable to the nourishing nature of the eating routine of newborn children.

Perchlorate in dairy milk and milk-based powdered infant formula in South Korea: Her N, Kim J, Yoon Y-Perchlorate has been distinguished in dairy milk and milk-based powdered baby recipe tests from a wide range of territories of South Korea. An aggregate of 37 dairy milk tests from 12 distinct brands and 26 milk-based powdered newborn child equation tests from four unique brands were tried for the nearness of perchlorate. The perchlorate fixation in all the examples was over the LOQ. The perchlorate identification information is given as follows: 1.99-6.41 $\mu\text{g L}^{-1}$ ($n = 37$, mean fixation = $4.59 \pm 0.17 \mu\text{g L}^{-1}$) for dairy milk and 1.49-33.3 $\mu\text{g kg}^{-1}$ ($n = 26$, mean focus = $7.83 \pm 0.22 \mu\text{g kg}^{-1}$) for milk-based baby recipe. This examination gives expanding proof that perchlorate normally happens in dairy items, probably as the aftereffect of perchlorate admission by dairy steers from water and feed.

Research Objective

- To Study the “Pediatric food product market in India, competitive insights, developer landscape and potential product of the market.
- Market Segmentation, Competitor landscape of pediatric market equivalent to Raptakos.

Research Methodology

Study Design

Analysis of secondary data and desk review of relevant documents.

Study Selection

The selection of sample is through world for Pediatric market, but focus is restricted to Indian market.

Data Collection

All the data was collected from various secondary sources. This includes the reports and project documents at each sector.

1. Clinical Trail.gov
2. Adige Insights
3. Company websites
4. SEC filing and presentations
5. Published articles, associations
6. Journals, Review articles, clinical studies
7. Pub med

Time Period

Data was collected and interpreted between 3rd February 2020 to 3rd May 2020.

Research Instruments(Tool & techniques)

Research Instruments was Excel Consisting of model and impact analysis based on attributes. The information was collected through secondary sources and referred sources like clinical trial.gov. Adis Insights, company websites etc.

Data Analysis

The gathered data was entered a form presentation. Impact analysis based on different attributes was calculated on the Excel based model and interpretation are entered in final report.

Disease Overview

Acute Gastroenteritis (Infantile Diarrhea) Specifically for zerolac

- Infectious diarrhea is a condition that causes inflammation of the gastrointestinal tract
- The infection is built up in the stomach and small intestine area.
- Characterized by frequent loose stools
- Diarrheal disease in infants is frequently complicated by lactose intolerance.

Cause and Symptoms

- Diarrhea can be caused due to infectious acquired through feco-oral route or by ingestion of debased food or water.
- Bacterial or parasitic infection, which is a rare cause in developed countries.
- Antibiotics

Symptoms

- Bloody stools
- Chills
- Fever
- Loss of control of bowel movements
- Nausea or vomiting
- Pain or cramping in the abdomen

Treatment

- Eat more foods containing starch fiber and that are easy to digest.
- Consume more food that contains nucleotides to improve gut mucosal defense, growth and repair of GI cells, that helps in increasing intestinal villi,
- Products like zerolac helps in building immunity by IgA levels that helps in defending diarrhea.
- Consumption of food supplements that has zero sucrose zero lactose and zero milk protein.

Market Segmentation of Pediatric Product

Pediatric Food Market Segments:

"The market is segmented based on product type, and distribution channel."



Marketed by distribution Channel

- Super Market
- Hyper Market
- Small grocery retailers
- Health and beauty retailers

Figure 2 India & china Pediatric food market segment



The above chart describes the India and china pediatric food segment in view of product type, distribution channel and topography. Supermarket, hypermarket, little basic food item retailers and excellence and health retailers are some of the key circulation channels operating in the pediatric food industry. Supermarket is the most favored dispersion channel among customers.

Product Basket Analysis of Various Companies equivalent to Raptakos

Marketed Products

Products	Company	Weight (gm.)	Price (Rs.)
Similac	Abbott	400	345
Dexolac	Danone Nutricia	400	515
Lactogen	Nestle	400	325
Pre nan HMF	Nestle	400	520
Pre nan LBW	Nestle	400	520
Similac neasure	Abbott	400	525
Dexolac Special Care	Danone Nutricia	500	498
Isomil	Abbott	400	495
Simyl MCT	FDC	425	425
Nan Lo lac	Nestle	200	470
Cerelac	Nestle	300	185
Nestum	Nestle	300	140

Table 2 Marketed Product of competitors

The above table shows various product of various companies and their price range present in the Indian market.

Competitive Landscape of Marketed Product

Lactodex Starter

Products	Company	Weight (gm.)	Price (Rs.)	Nutritional content
Lactodex Starter	Raptakos	450	480	Inositol, Whey: casin 40:60
Similac	Abbott	400	345	Inositol Absent, Whey: casin 20:80
Dexolac	Danone Nutricia	400	515	Inositol Absent
Lactogen	Nestle	400	325	Inositol Absent

Table 3Competitive Landscape of Lactodex starter

Competitor Product Price comparison chat:

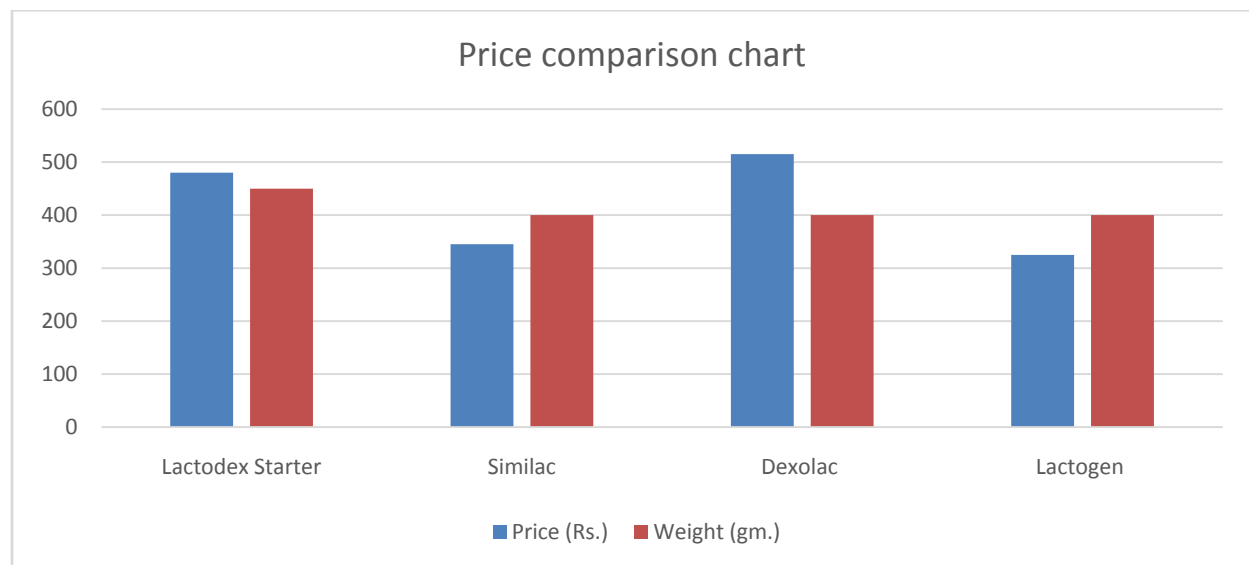


Figure 3 Lactodex range Price comparison

The given bar chart reflects that Lactodex Starter one of the most leading Pediatric product of raptakos as compared to other competitor products like similac, Dexolac and Lactogen in comparison of product price and weight ranging in between 400 and 500 fits best and is most recommendable and preferred brand of Raptakos.

Lactodex HMF

Products	Company	Weight (gm.)	Price (Rs.)	Nutritional content
Lactodex HMF	Raptakos	400	524	Does not contain binder or additives
Pre nan HMF	Nestle	400	520	contain binder obtained from non-veg source

Table 4Competitive Landscape of Lactodex HMF

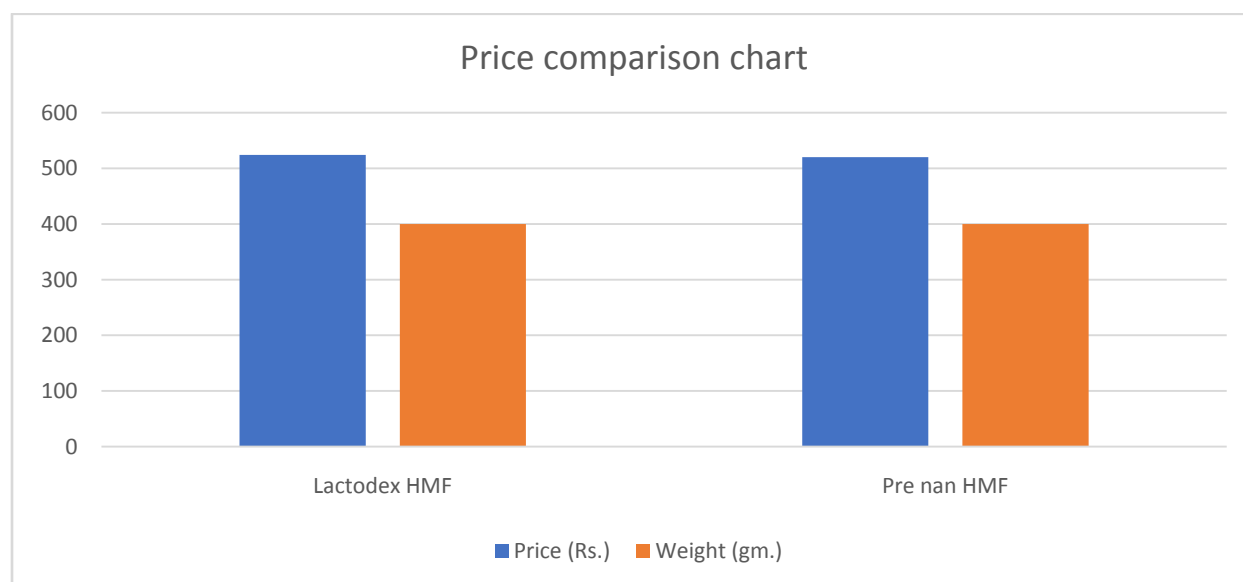


Figure 4 Lactodex range Price comparison

The above graph shows the price comparison of the pediatric products of Raptakos and nestle which shows that the price is relatively same. But the per feed cost of Pre nan is Rs. 40 and individual sachet is not available while per feed cost of lactodex HMF is Rs. 22.50 only also can be given in individual sachet for convenience and meeting the needs. Which make it preferable and more recommended brand.

Lactodex LBW

Products	Company	Weight (gm.)	Price (Rs.)	Nutritional content
Lactodex LBW	Raptakos	400	552	Alpha lactalbumin 1.4gm, Inositol Present
Pre nan LBW	Nestle	400	520	Alpha lactalbumin absent, Inositol absent
Similac neosure	Abbott	400	525	Alpha lactalbumin absent
Dexolac Special Care	Danone Nutricia	500	498	Alpha lactalbumin absent, Inositol absent

Table 5Competitive Landscape of lactodex LBW



Figure 5 Lactodex range Price comparison

The above graph shows that the price of lactodex LBW as compared to other competitors is comparatively high the reason behind this is Raptakos provides a high-quality product with Alpha lactalbumin and inositol which is not served by the competitive brands.

Zerolac

Products	Company	Weight (gm.)	Price (Rs.)	Nutritional content
Zerolac	Raptakos	400	520	7.9 mg Nucleotides, Zero sucrose and lactose ,40% fat as MCT
Isomil	Abbott	400	495	Nucleotides absent, Sucrose Present, MCT absent
Simyl MCT	FDC	425	425	Nucleotides absent, MCT absent
Nan Lo lac	Nestle	200	470	Contains lactose

Table 6Competitive Landscape of zerolac

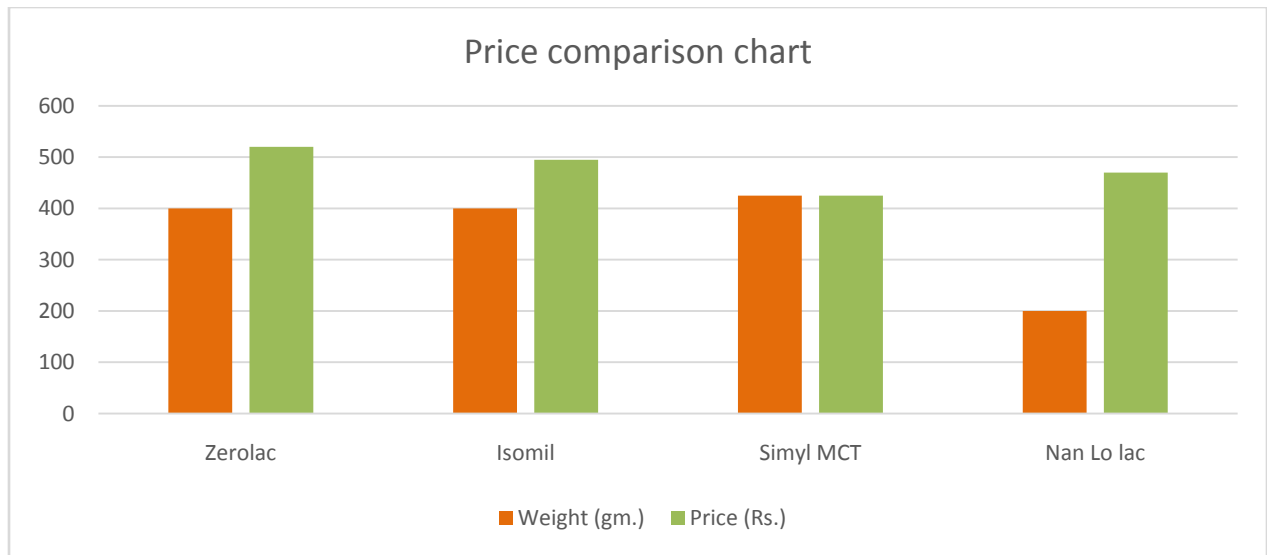


Figure 6 Zerolac Price comparison

The above graph shows that the price of zerolac as compared to other competitors is comparatively high the reason behind this is Raptakos provides a high-quality product zerolac containing nucleotides, sucrose, 40% fat as MCT as a source of energy and 100% maltodextrin for easy digestion which is not served by the competitors brand or either present in very minute quantity. Making it more trusted and recommended brand besides being high in price.

Veelac

Products	Company	Weight (gm.)	Price (Rs.)	Nutritional content
veelac	Raptakos	400	314	Contains Alpha amylase, 10mg/100gm iron content
Cerelac	Nestle	300	185	Contains Alpha absent, only 7.5mg/100gm iron content

Table 7 Competitive Landscape of veelac



Figure 7 Veelac Price comparison

The above graph shows the price comparison of veelac and the only competitor nestle cerelac the revenue breaks up of both the products are relatively same in comparison to the price and weight of the both the products. The knockout points that the veelac contains is that veelac contains Alpha amylase, 10 mg/100gm iron meeting increased iron requirement comes in tin pack ensuring hygiene making it more superior.

Easifud

Products	Company	Weight (gm.)	Price (Rs.)	Nutritional content
Easifud	Raptakos	500	360	100% fat as MCT, 4mg/100gm zinc, 10 mg iron.
Nestum	Nestle	300	140	MCT Absent, 2.5mg/100gm zinc, 8 mg iron.

Table 8 Competitive Landscape of Easifud



Figure 8 Easifud Price comparison

The above graph shows the price comparison of Easifud of Raptakos and nestum of Nestle as the graph shows that the price of both the product in comparison to their weight are relatively same. But esifud have the advantage of containing 100% fat as MCT contains 4mg/100mg zinc and iron which is either absent or present in small quantity in the competitor product.

Discussion & Conclusion

This report consists of the various competitive analysis of the various MNC's in India working in the pediatrics division. There are lots of MNC's in their field among that the competitive analysis of various MNC's shows there is a wide scope of for the pediatric market in India and they are having the wide range of product basket and the Doctors mostly prefer brand of these companies like Nestle, Raptakos Brett & co.ltd., Danone, Abbott and etc. This report consists of all about the competitive analysis, competitor landscape, product basket and about the pricing detail and the product analysis of each of the companies and their prices. This report helps me to understand the pediatric Pediatric food market in India and about developing market of the product .Increasing awareness about nutrition, growing population of women professionals, food safety concern, increasing urban population, declining birth rates, advocating breastfeeding through government activities and home cooking are the elements that limits the development of Pediatric food market. Utilization of cutting-edge innovations, advancements in pediatric food production what's more, overwhelming interests in developing markets would drive the development of the market.

Lack of micro and macro nutrition in the child's diet with small tummy size and high nutrition needs together causes a nutrition gap. It is there for essential to enhance the child diet by including nutrition rich food group such as grains milk formula and other dried food.

Raptakos being established since 1930 is restricted to Indian market only if they focus on some important marketing strategies and if these recommendations are implemented properly there will be a hike of about 80 business.

- **Package Design**

Before customer purchase the product, they are usually attracted by the product design. The out package of the product should have attractive color with clear brand and logo will describing the product features.

- **Promotional Messages and Themes**

Now in this digital era product promotional message regarding health knowledge and proper nutrition through social media, pop-up messages, digital marketing can play a major role in increasing the product revenue by 20 to 30%.

- **Pricing Objective and Strategies**

The pricing strategy also has the objective aiming at business increase. They can include cost driven strategy, competitor driven and customer driven strategy to maximize their business growth.

Limitations

First point of limitation is that the data and data sources where limited.

The company publishing the data may not be reputable

Some of the data and information used may be old

The data used in the project are approximate.

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