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RESILIENT DAIRY ALLIANCE
RDA

SECURING THE FUTURE

EMBEDDING RESILIENCE IN THE INDIAN DAIRY SECTOR

September 2026

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List of Abbreviations

BMCs	Bulk Milk Coolers
BRSR	Business Responsibility and Sustainability Reporting
CEEW	Council on Energy, Environment and Water
CSR	Corporate Social Responsibility
CSRD	Corporate Sustainability Reporting Directive
EU	European Union
FGDs	Focus Group Discussions
FPOs	Farmer Producer Organisations
GHG	Green House Gas
ICAR	Indian Council of Agricultural Research
IGFRI	Indian Grassland and Fodder Research Institute
KPIs	Key Performance Indicators
LMS	Learning Management System
MRV	Measurement, Reporting and Verification
NDRI	National Dairy Research Institute
PTI	Press Trust of India
SHGs	Self Help Groups
SEBI	Securities and Exchange Board of India
TMR	Total Mixed Ration

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01. Executive Summary



India's dairy sector is on a strong growth trajectory. Per capita milk consumption has risen sharply over the last five decades and is projected to nearly double again in the next 25 years, moving closer to consumption levels seen in developed economies. Sustaining that growth, however, depends on a steady supply of raw milk and that supply is increasingly exposed to vagaries of climate in form of heat stress, erratic rainfall, and fodder shortages. Milk production growth has already slowed from 6–7% a year to roughly 3.5%, even as demand keeps climbing at the same pace it always has a gap that will only widen if climate risk to the milk supply goes unaddressed.

This is no longer a farm-level problem alone. It is showing up directly in company balance sheets: procurement costs spiking during heatwaves, margins compressing because milk pricing can't absorb higher input costs, and the fat and protein content shifts that come with heat stress threatening the value-added products — cheese, paneer, and curd — that many dairy companies have bet their growth on. A parallel, less visible pressure is building alongside these operational risks: disclosure expectations under frameworks like Business Responsibility and Sustainability Reporting (BRSR) are expanding down supply chains, and export-linked companies are starting to face buyer, and lender demands for emissions and due-diligence data, even without being directly regulated.

Put together, these pressures reframe the question dairy companies face. Climate resilience is no longer a sustainability add-on to weigh against other priorities, it is becoming a precondition for securing milk supply, protecting margins, and keeping premium and export markets open.

This playbook is grounded not only in analysis but in practice — drawing on real, on-ground initiatives from organisations across the dairy value chain: Cornext, Keventer Agro, Milky Mist, CP Milk (Gyan Dairy), Shreeja, ITC Limited, and Kumaraguru Institutions (in partnership with EDF). Their experience anchors the recommendations below in what is already working, not just what should be tried.

For embedding climate resilience in dairy company's day to day operations, this report proposes a phased approach that allows them to identify and prioritise actions based on their current level of preparedness, operational context, and key climate-related vulnerabilities:

> **Climate resilience is becoming essential to secure milk supply, protect margins, sustain dairy growth, strengthen farmer resilience, and maintain access to premium and export markets.**

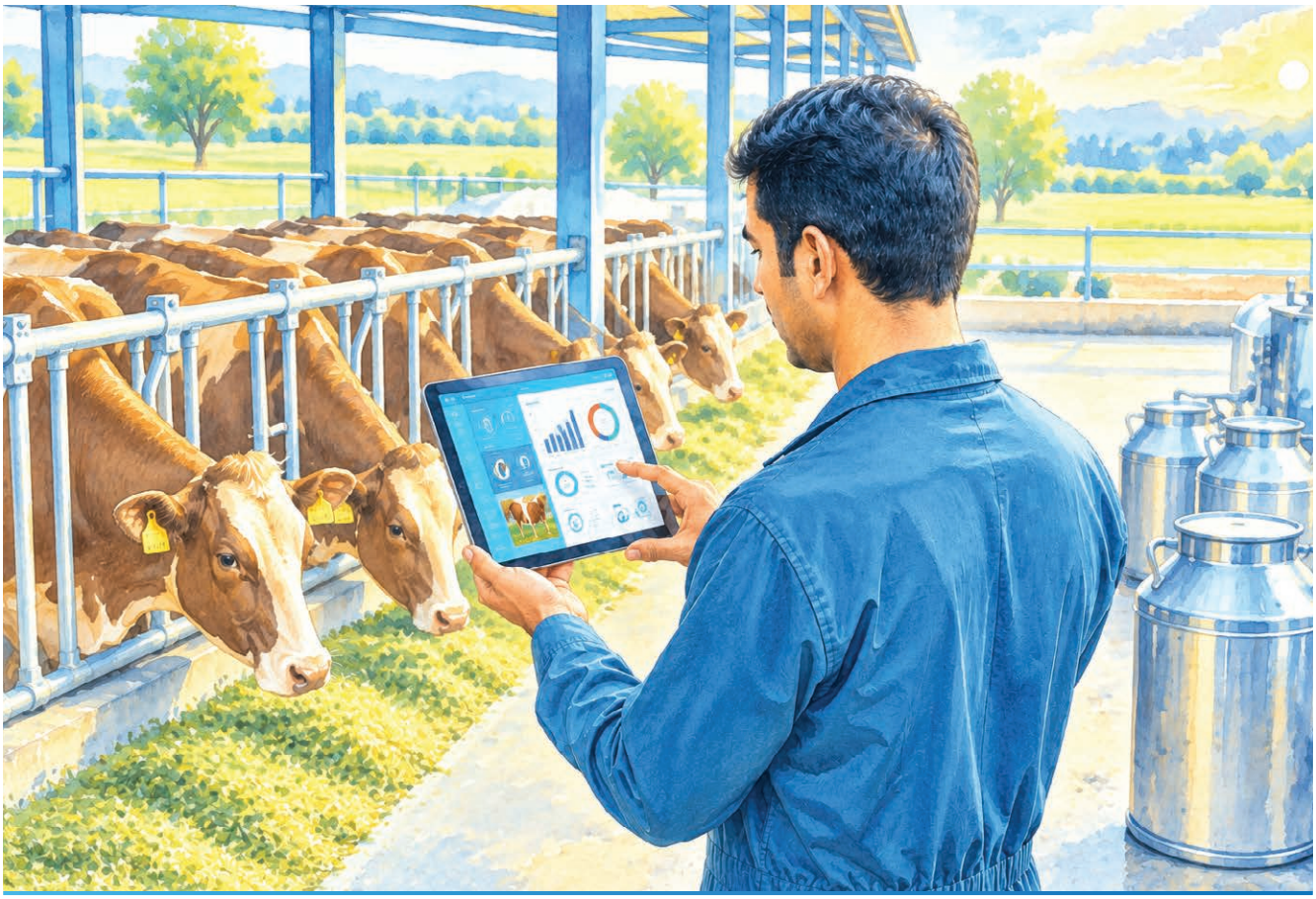
- **Immediate Priorities:** Address the most pressing climate-induced risks to current operations — heat stress management, feed & fodder availability, and closing first-mile cold chain gaps etc. — to stabilise milk availability and quality. Cornext's fodder-entrepreneur network and Keventer Agro's decentralised village-level chilling model (Bulk Milk Coolers) show how these can be built directly into procurement infrastructure.

- **Medium-Term Priorities:** Progressively strengthen supplier systems, productivity, and resilience - breed improvement, farmer training, and extension services embedded into procurement itself, and strengthening the data systems needed to monitor yield, cost, and quality over time. Milky Mist's contract dairy farming model, CP Milk (Gyan Dairy)'s feed-and-nutrition training, and the EDF-Kumaraguru Climate-Smart Dairy Entrepreneurship Programme - which has trained 112 entrepreneurs reaching over 10,000 smallholders through Rural Marts - illustrate how training and productivity investment can be run as procurement strategy rather than as one-off outreach. Shreeja's women-led governance and ownership model and ITC's phygital doorstep veterinary services point to what deeper, structural partnership with farmers can look like.

- **Long-Term Priorities:** This is where the dairy sector's climate resilience journey is headed next - where we expect to see innovation and activation happening over the coming years, as companies build on the foundational

interventions, inspired by the depicted case studies. While practices at this horizon are still in their early stages of building and adoption, the direction is already visible: embedding sustainability into core business processes and long-term strategy - expanding into value-added and export markets, deepening farmer partnerships, and reducing structural exposure to future climate shocks - while sustaining the progress made through earlier phases

The starting point and pace of implementation may vary across companies depending on their current level of preparedness and sustainability maturity. However, across all three horizons, the report's central argument holds: climate resilience works best when it is built into procurement and supplier strategy directly. Companies already practicing this are demonstrating that resilience investments and commercial performance move together, not against each other. The sector's future will be determined less by how much milk companies can sell, and more by how reliably they can secure it. This report sets out what that requires.



02. The Stakes-Why This Moment Demands a Different Lens



India's dairy sector is growing fast, but the ground beneath it is shifting. As per the Indian Dairy Association, per capita milk consumption has risen from 110 to 460 grams a day over the last five decades and is projected to reach 850 grams within 25 years, close to levels seen in developed countries (Indian Dairy Association, 2026). Meeting this demand means more than adding processing capacity. It means a steady supply of raw milk from farms, and that supply is now under growing climate pressure. Recent studies from India indicate that climate variability, frequent heat waves, and unpredictable rainfall are becoming major challenges for livestock productivity and animal welfare, particularly in tropical and subtropical production systems (Gayari et al., 2024; Gujar et al., 2025).



The Farm-Level Impact

The following connected pressures are converging at the farm level:

- **Feed & Fodder Challenges:**
  - Rising temperatures and erratic rainfall reduce both the availability and nutritional quality of fodder. Higher temperatures decrease efficiency of photosynthesis and reduce the life cycle of the fodder crops, leading to decrease in biomass accumulation (Yadav et al., 2026; Rai et al., 2014).
  - Drought stress increases fibre fractions (Neutral Detergent Fibre and Acid Detergent Fibre), lowering digestibility and overall nutritive value (Yadav et al., 2026); in lucerne, it also causes a decrease in crude protein, crude fibre content, and other quality markers alongside a straight yield loss (Varol et al., 2024).
  - Lower soil moisture impacts nitrogen fixation and nutrient uptake in leguminous fodder plants - in cowpea, root nodule number and weight start dropping off sharply once soil moisture dips below 60% of water holding capacity, which chokes off nitrogen accumulation and cuts into biomass production, a bigger problem in arid and semi-arid rainfed areas (Melo et al., 2025).
  - Rainfall variability also has an indirect but important effect on dairy productivity through its influence on fodder availability, water resources, pasture growth and farm sanitation (Herbut et al., 2018; Singh 2021).
- **Animal Health:**
  - Heat stress is one of the most significant climate impacts on livestock — raising body temperature, respiration, heart rate, and diverting energy away from milk production (ICAR-NDRI, 2023).
  - Studies indicate heat stress can reduce fertility by 20–30%, and milk production and reproductive performance by 58.3% and 63.3% respectively, in the most severe cases. Crossbred cattle are most susceptible, followed by buffaloes and indigenous cattle (ICAR-NDRI, 2023) - a particular concern given buffalo account for a large and rising share of India's milk supply.
  - Heavy or erratic pre-monsoon rainfall, combined with high humidity, waterlogging, and unhygienic farm conditions, can lead to higher incidences of mastitis and parasitic infections (Kharwar et al 2026).
- **Milk Production**
  - A recent study by the Council on Energy, Environment and Water (CEEW) found that 12–14% of dairy farmers are already experiencing reduced milk production due to rising temperatures. More than half of buffalo and crossbred cattle owners reported experiencing climate-related impacts on dairy production, indicating that climate risks are already affecting milk supply (CEEW, 2026).
  - Heat stress has been shown to reduce milk fat, protein, and short-chain fatty acid content, while increasing long-chain fatty acids (Kadzere et al., 2002). Similarly, Van Laer et al. (2015) found that rising heat stress lowers lactose, protein, and fat levels in milk. Supporting this, Bernabucci et al. (2015), studying a dairy farm of 600 Italian Holstein cows near Brescia, Italy, reported a marked drop in milk fat content during

summer (3.20 g/100 g) compared to winter (3.80 g/100 g) and spring (3.61 g/100 g).

- Rainfall affects milk production mainly by influencing fodder availability, water supply, farm hygiene, and the spread of diseases, rather than through a direct effect on the animal's body (Kharwar et al 2026).



The Business Impact

These farm-level pressures translate into a distinct set of commercial risks for dairy companies - separate from, though caused by, the impacts on the farm itself:

- Rising procurement costs: A constrained milk supply drives up the cost of sourcing raw milk. In 2025, Mother Dairy officials reported that procurement costs had risen by Rs 4-5 per litre, during February & March, attributing the increase to an early onset of summer and heatwaves (PTI, 2025). This isn't an isolated spike: heatwave frequency across India is projected to rise four-to-tenfold in coming decades (Singh & Mall; 2023).

- Margin compression: Passing these higher costs on to consumers is difficult. Milk pricing is highly sensitive to price increases, an analysis by Subramanian et al. (2019) found that even small price increases can cause demand to drop noticeably for liquid milk, milk powder, and curd. Input costs (feed, energy, logistics, labour) are rising faster than companies can recover through pricing, producing a real and visible margin squeeze.

- Constraints on value-added product's growth: Several large private dairies have strategically reduced or exited the low-margin fluid milk business to focus exclusively on products such as cheese, curd, paneer, desserts, and flavoured beverages. However, as climate change was observed to alter the milk fat protein and fat content, this will pose a challenge for the businesses to continue.

Beyond these business impacts, dairy companies also face a less visible but fast-approaching risk: regulatory and market-access exposure tied to climate and sustainability performance. In India, disclosure requirements under Securities and Exchange Board of India's (SEBI) Business Responsibility and Sustainability Reporting (BRSR) framework are steadily expanding in scope and are increasingly extending value-chain expectations down to suppliers, not just listed companies themselves (CEEW, 2024).

The BRSR framework also gives Indian companies a useful foundation for aligning with global standards such as the European Union's (EU) Corporate Sustainability Reporting Directive (CSRD), since both call for structured disclosure on governance, environmental performance, and value-chain conduct. However, CSRD's direct legal scope remains narrow, limited largely to entities with substantial EU turnover, EU subsidiaries or branches, or EU-listed securities, so it does not apply directly to most Indian dairy companies. Its relevance is instead indirect: dairy companies exporting to or supplying EU value chains may still face pressure from EU customers or lenders for emissions data, labour policies, and due-diligence evidence, even without being direct CSRD reporters. Strong BRSR compliance thus helps dairy companies respond more readily to such requests, acting as a bridge rather than a substitute for CSRD-aligned reporting (Keslio, 2026).

Companies that integrate sustainability into their operations and build strong measurement, reporting and verification (MRV) and traceability systems can unlock wider business benefits beyond meeting future requirements, by able to comply to national and global sustainability regulations. These efforts can contribute to lower cost of capital, enhanced investor confidence, better operational efficiency, and stronger trust among stakeholders, while also strengthening the company's readiness to respond to evolving market and regulatory expectations.

The central question for dairy companies is therefore no longer whether to respond to climate change, but how to embed climate resilience into core business strategy to secure future milk supplies, strengthen competitiveness, and sustain long-term growth.

To answer this question, we have developed an actionable playbook. This playbook draws on primary research-including structured consultations with dairy companies-alongside a review of the secondary evidence. It features a curated set of real initiatives that companies are already undertaking to build resilience across their supply chains, translating these into a practical, replicable set of recommendations for the sector at large.

03. From Strategy to Action: Prioritising Climate Action for Resilient Growth



The business case for embedding climate resilience into dairy operations is clear. However, strengthening supply chain resilience requires a phased approach that balances immediate operational needs with longer-term strategic priorities. Rather than attempting to address every challenge simultaneously, companies can sequence climate actions based on business risk, operational feasibility, and their potential to strengthen productivity and procurement resilience.



Guiding Principles for Action

While the specific actions adopted will vary across companies, three guiding principles can help shape an effective approach.

First, prioritise interventions that can help reduce variability in milk production and quality, limiting volatility in procurement costs, as these are likely to deliver the greatest operational and business value in the near term.

Second, integrate climate resilience into core procurement and supplier engagement strategies rather than treating it as a stand-alone sustainability or CSR initiative confined to separate programmes or budgets. This means building climate and resilience criteria directly into how milk is sourced, how suppliers are selected and supported, and how long-term procurement relationships are structured. Strengthening farmer productivity and resilience ultimately strengthens business resilience.

Finally, businesses would need close collaboration and engagement with farmers, suppliers, and other stakeholders across the value chain to build the resilience needed for long-term viability. This could be best achieved through low-cost, community-based solutions rather than high-cost individual investments, given that most small farmers operate with limited capital and prefer low-risk options, working through existing local systems such as state dairy federations, cooperatives, SHGs, FPOs, and village institutions rather than creating parallel structures. Success can be measured through a mix of environmental and socio-economic indicators, including greenhouse gas emissions alongside procurement reliability, productivity improvements, milk quality, farmer retention, margin stability, and reduced exposure to climate-related disruptions.

Using these guiding principles, businesses can identify and prioritise actions based on their current level of preparedness, operational context and key climate-related vulnerabilities, and build their sustainability roadmap in a phased manner. While the priorities have been grouped into Immediate, Medium-Term and Long-Term actions, the starting point and pace of implementation may differ across businesses.

> **Build climate resilience into procurement through collaborative, phased actions that strengthen supply-chain and business resilience.**

- **Immediate Priorities:** Actions that businesses need to prioritise now to address immediate climate-induced risks and vulnerabilities and strengthen the resilience of current operations.
- **Medium-Term Priorities:** Actions that businesses can progressively take up to strengthen systems, improve productivity and resilience, and scale sustainability practices across their operations.
- **Long-Term Priorities:** : Actions that enable businesses to embed sustainability into core business processes, decision-making and long-term strategy, while sustaining and deepening the progress made through earlier phases.

The section below gives the overview of these priorities

Immediate Priorities: Address Immediate Supply Risks

The first priority should be reducing the most immediate climate-related risks that directly affect milk production and procurement. Actions at this stage should focus on improving animal welfare during periods of heat stress, reducing seasonal feed shortages, and minimizing avoidable milk losses and maintaining milk quality, across the supply chain.

Priority areas include strengthening heat stress management through improved, affordable climate resilient shelter, water availability and management, and seasonal animal health protocols; improving feed and fodder availability through local sourcing partnerships, fodder aggregation, and silage where appropriate; and addressing first-mile cold chain gaps that contribute to quality deterioration and milk losses.

These actions can deliver relatively quick improvements in milk availability, milk quality, and procurement stability while helping farmers adapt to increasingly variable climatic conditions.



Case Study

Solving Climate Change-Driven Fodder Shortages: How Cornext Built a Distributed Fodder-Entrepreneur Network for Year-Round Silage Availability.

Priority Area: Reducing seasonal feed and fodder shortages - improving availability through local sourcing partnerships and fodder aggregation



Empowering local entrepreneurs to build year-round fodder supply.

The Challenge

Dairy farms depend on a consistent, year-round supply of high-quality fodder to sustain healthy livestock and optimal milk yield — but seasonal fodder shortages and inconsistent quality remain a persistent constraint for many localities. ICAR- Indian Grassland and Fodder Research Institute (IGFRI) Jhansi has estimated that there is a deficit of 11.24-32% and 23 % for green and dry fodder respectively in the country (Choudhary et al; 2024).

What Did They Do?

Cornext built a franchise-style network of local "fodder entrepreneurs" individuals who invest in Cornext's baling technology to produce silage bales for their own locality, creating a fodder bank that ensures year-round availability while also generating local employment.

How Did They Do It?

Cornext built a network of rural fodder entrepreneurs by decentralizing green fodder preservation through patented, low-cost mini silage baler machines. They trained local operators to produce, pack, and sell compact 50-kg fermented silage bales, turning micro-entrepreneurs into localized supply chain hubs for dairy farmers.

What Other Players Can Learn?

- The entrepreneur-led model offers a useful pattern for closing localized input-access gaps, without requiring the company to own last-mile distribution directly
- The guaranteed buyback of fodder output is likely the key factor making the entrepreneur economics work This buyback mechanism could serve as a replicable design principle for other agri-input gaps beyond fodder

Case Study

How Did Keventer Agro Limited Decentralise Milk Chilling to Strengthen Milk Quality and Reduce Transportation Costs?

Priority Area: Closing first-mile cold chain gaps - preventing quality deterioration and milk losses at the point of collection



Bulk Milk Coolers

The Challenge

As climate variability and the frequency of heat-related challenges increase, maintaining milk quality between village-level collection and the main chilling centre is becoming increasingly important. In the existing model, milk is collected from villages located across a wide geographical area, with milk sometimes travelling up to 40–50 km to reach a chilling centre. Longer transportation distances and delays in chilling can increase the risk of quality deterioration, particularly during hot weather. This creates both a milk-quality risk and an additional transportation cost for the dairy procurement operation.

What Did They Do?

Keventer Agro Limited is developing a decentralised milk chilling model by strategically installing small 1 kL Bulk Milk Coolers (BMCs) at selected village-level collection points. These BMCs will serve as local chilling hubs, allowing milk collected during both morning and evening collection cycles to be chilled close to the point of procurement. At the end of the day, the chilled milk can then be consolidated and transported to the main chilling centre through tankers.

How Did They Do It?

The proposed model brings chilling capacity closer to milk producers instead of depending entirely on a central chilling centre. Selected villages within the procurement network can be equipped with 1 kL BMCs based on milk availability, collection volume and geographical suitability. Morning and evening milk collections can be received and chilled locally, reducing the time between milk collection and effective chilling.

At the end of the day's collection, the chilled milk from these decentralised points can be transported by tanker to the main chilling centre. This approach can help maintain milk quality by reducing the distance and time milk remains unchilled, while also allowing transportation to be consolidated rather than making frequent long-distance movements from individual villages.

What Other Players Can Learn?

- Decentralised chilling can reduce climate-related quality risks by bringing cooling infrastructure closer to milk collection points.
- Small-capacity BMCs can be strategically deployed in areas where milk procurement is geographically dispersed, and transportation distances are high.
- Combining morning and evening collection with local chilling can improve operational flexibility and reduce the risk of prolonged milk exposure before chilling.
- Chilled milk consolidation through tankers can potentially reduce unnecessary transportation movement and associated costs.
- Climate resilience can be integrated directly into milk procurement and supply-chain planning, rather than being treated as a separate sustainability activity.



Bulk Milk Coolers

Medium-Term Priorities: Strengthen Productivity and Supply Chain Resilience

While immediate climate-related vulnerabilities are addressed, companies can progressively shift their focus towards strengthening the productivity and resilience of their supplier base. This phase moves beyond responding to immediate risks to building the systems, capabilities and farmer relationships needed to sustain milk supply over time. These actions are not only sustainability measures but also form an important part of a company's procurement strategy. By supporting productivity, animal health and farmer capabilities today, companies can strengthen the quality, reliability and resilience of the milk supply they will depend on in the future.

In the near term, sustainability gains are largely productivity gains - driven by getting the basics of dairy operations right: feed quality, animal nutrition, and animal health. Strengthening these fundamentals is what makes long-term resilience achievable, rather than aspirational. Priority areas include supporting breed improvement and productivity enhancement; strengthening farmer training on climate-resilient dairy management, animal nutrition, and animal health; and integrating extension services with procurement teams to provide continuous technical support to milk producers.

Businesses here also can work to strengthen the participation of women in dairy production and decision-making. Women play a significant role in day-to-day livestock management in many smallholder households, and their engagement in training, extension, animal health, nutrition and climate-resilient practices can improve the uptake and sustained application of these interventions. Companies can therefore design extension and capacity-building programmes to ensure women farmers and women involved in dairy operations are actively reached, trained and represented in producer-level engagement and decision-making processes.

At the same time, companies can also begin building systems to monitor farm-level productivity, seasonal yield variability, input costs, milk quality, and procurement reliability. Developing these capabilities will enable evidence- based decision-making, support targeted interventions, and lay the foundation for MRV systems.

Case Study

How Did Milky Mist De-Risk Procurement Against Climate-Driven Fodder Shortages?

Priority Area: Procurement-linked extension support



The Challenge

India's milk production growth has slowed sharply, from 6–7% annually until 2022 to around 3.5–3.78% now, even as demand keeps rising at 6–7% a year. At the farm level, fodder shortages and rainfall deficits have pushed up costs by 35–40% for marginal farmers, making dairy farming less attractive to them (Mandal, 2026). This volatility is compounded by broader climate and trade-related shocks. For Milky Mist - a value-added dairy manufacturer requiring 5–7 litres of milk per kilogram of finished product — this creates a direct threat to its high-margin paneer and mozzarella business, since a fall in milk procurement hits value-added output first (Mandal, 2026).

What Did They Do?

Milky Mist moved to a contract dairy farming model, helping establish 500 farms with 15–25 cows each across Tamil Nadu in the last year and a half. This approach has improved surpluses for farmers, allowing them to invest more in enhancing milk output

How Did They Do It ?

Milky Mist supported farmers in securing bank loans to invest in cattle and pushed a shift from dry fodder (paddy or wheat residue), which cattle don't fully digest, toward green fodder, silage, and Total Mixed Ration (TMR), a balanced compounded feed. This improved both milk yield and quality and gave farmers a steadier income through the year rather than one tied to seasonal fodder availability. Contract farmers are paid the same base rate as other suppliers but earn an additional 50 paise per litre as a quality incentive. In India's context, where 60% of milk is produced by small farmers owning just 2 to 3 cattle, even a modest incentive like this has enormous power to shift behaviour. Importantly, Milky Mist continued procuring from its existing farmer base alongside the new contract farm network, running a dual-track sourcing model.

What Other Players Can Learn?

- Contract farming can help de-risk supply without displacing the smallholder base that procurement has traditionally relied on. A blended model, layering contract farming alongside existing farmer relationships, can build a more resilient supply base while keeping those relationships intact.
- Even small, quality-linked incentives, like the 50 paise per litre premium offered here, can shift farmer behaviour without requiring a fundamentally different payment structure. By helping farmers access credit for cattle investment, companies can deepen supply security without taking on the capital cost directly themselves.

Case Study

How Did CP Milk & Food Products (Gyan Dairy) Improve Animal Health and Milk Yield Through Type 1 Feed Adoption?

Priority Area: Strengthening farmer awareness and training on animal nutrition



Quality feed, healthy herd, greater yield—Women's power, a greener field.

The Challenge

Milk producers were habituated to feeding Chunni-Choker and other home-available rations, which often provided inadequate and imbalanced nutrition. This contributed to low milk yields and reproductive health issues, even in otherwise productive animals. At the same time, rising temperatures and increasing heat-stress conditions were placing additional pressure on dairy animals, reducing feed intake, productivity and reproductive performance. Animals receiving inadequate nutrition were consequently more vulnerable to these climate-related stresses and less able to sustain milk production during periods of heat stress.

Gyan Dairy's cattle feed sales stood at 16,900 MT in 2018–19, with Type 1 Feed accounting for only around 3% of total feed sales, signalling the limited adoption of nutritionally optimised feed among farmers. This highlighted the need to improve access to balanced nutrition as both a productivity intervention and a means of strengthening animal resilience to climate-related stresses.

What Did They Do ?

Gyan Dairy made a conscious push to shift farmers toward high-nutritive Type 1 Feed, positioning it as a way to compensate for green fodder scarcity by supplementing body-maintenance needs through better feed rather than relying on traditional home rations. The company built out its feed portfolio in step with this push - expanding from a single variant (Gyandhara Gold Pro) to include Gyandhara Bhains Special for buffaloes and Gyandhara Diamond Pro for very high-yielding cows.

How Did They Do It ?

Awareness was driven primarily through Gyan Chaupal, the company's farmer engagement platform, using focus group discussions (FGDs) with visual aids and verbal communication to explain the benefits of Type 1 Feed. This was reinforced with cattle feed plant visits, so farmers could see the manufacturing process and raw materials firsthand, and aggressive on-ground education through wall paintings in villages.

What Other Players Can Learn?

- Sustained farmer engagement and education can shift feed behaviour at scale: cattle feed sales rose from 16,900 MT in 2018-19 to 66,771 MT in 2025-26, with Type 1 Feed's share of total feed sales growing from roughly 3% to 30% over the same period
- Milk procurement rose by 80% over the last seven years, and the farmer base grew from 80,000 to more than 3 lakh, pointing to strengthened farmer loyalty alongside the yield gains
- Investing in high-nutrient feed and the education needed to drive its adoption can lift both farmer incomes (through better yields) and company economics (through higher procurement and lower cost per litre), a mutually reinforcing loop worth replicating.

Case Study

What Made Shreeja's Women-Led Dairy Network Effective in Addressing Heat Stress?

Priority Area: Advancing women's leadership in dairy production while building climate-resilient management practices.



Producer awareness programme.

The Challenge

Dairy farmers in Chittoor, a drought-prone district in Andhra Pradesh, are facing a sharp rise in heat-related stress on their cattle. Rising temperatures - intensified by El Niño and shifting weather patterns - are pushing milk yields down significantly during summer months, while green fodder and water grow scarce. Climate change is compounding an already water-stressed region's vulnerability: erratic rainfall and worsening drought cycles are eroding both fodder availability and animal health, threatening farmer incomes and, in some cases, pushing families out of dairy farming altogether. Women, who do much of the day-to-day work of animal care in these households, bear a disproportionate share of this burden, yet have historically had limited voice or ownership in how dairy supply chains are run.

What Did They Do?

Shreeja Mahila Milk Producer Company Limited built a women-owned and women-managed dairy company that now spans over a lakh member across twelve districts. Rather than treating heat stress as a side issue, Shreeja embedded climate-coping support directly into its farmer services - fair milk pricing, subsidised fodder seed, and on-call veterinary access - while placing ownership and governance of the company in the hands of its women members.

How Did They Do It?

Shreeja combined structural and technical interventions. Structurally, it created a two-tier governance model of village-level contact groups and member relations groups, giving women a direct channel to raise concerns and shape decisions, alongside shareholding that ties farmer income to company performance. On the technical side, Shreeja ran regular health camps to sensitise farmers to the effects of heat stress on cattle, and its Model Farms in Chittoor and Anantapur delivered hands-on training in balanced feed formulation, breeding, silage-making, fodder cultivation, and broader farm management, building the skills members needed to keep animals productive through worsening summers. It also distributed free fodder seed during shortage periods and ran around 200 farmer-education sessions a month on hot-season cattle management.

What Other Players Can Learn?

- Pairing gender-inclusive governance with practical, farm-level training is central to making this model work
- Women aren't just recipients of a service, they own it and shape it, which builds the trust needed for training to actually change behaviour on the ground
- The model also shows the value of routinised, high-frequency farmer education (monthly sessions, standing veterinary access) over one-off interventions, particularly for climate-linked risks like heat stress that recur seasonally and demand consistent management rather than a single fix.

Case Study

Phygital Model of Animal Health Care Services: How ITC Executing the Doorstep Veterinary Service to Dairy Animals

Priority Area: Strengthening animal health, nutrition, and climate-resilient dairy management.



Animal Treatment



Health Camps/Preventive



Breeding Services



Training/Awareness

The Challenge

India's dairy sector loses an estimated ₹1.4 trillion annually due to poor animal health, driven by low disease awareness, delayed treatment, weak veterinary infrastructure, and limited access to qualified professionals. With nearly 80% of veterinarians based in urban areas, rural smallholder farmers face a major service gap and often depend on untrained local paravets, whose services are costly, inconsistent, and prone to misdiagnosis. At ₹1,000–₹1,500 per visit, such care increases treatment costs while putting milk productivity, farmer income, and dairy supply chain stability at risk.

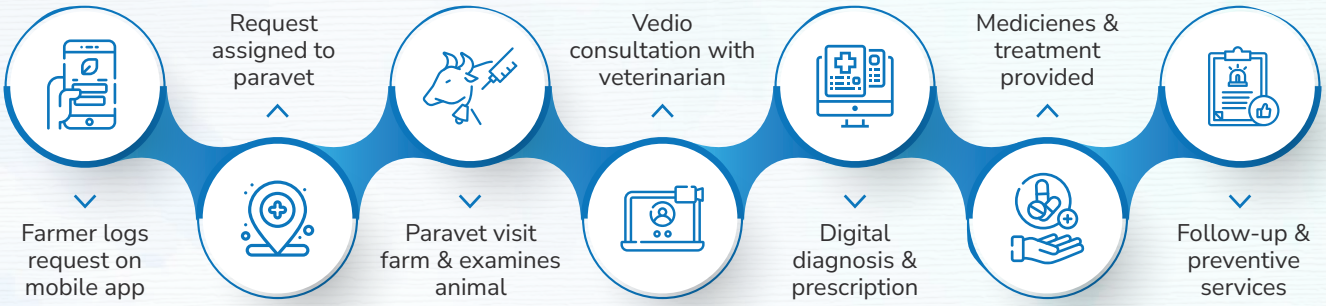
What Did They Do?

ITC has designed a phygital, hybrid service model to address the limited availability of qualified veterinarians in rural areas and reduce service delivery costs, combining village-level physical support with remote expert consultation. The model builds a hub-and-spoke service network, placing trained paravets at the village level and qualified veterinarians at a central hub, and enables doorstep animal care through paravets who visit farmers, collect basic health details, provide medicines, and support follow-up services. Digital tools support diagnosis and treatment guidance, connecting paravets, farmers, and animals with central veterinarians through video consultation,

digital prescriptions, and a tech-enabled mobile application. Together, these elements deliver preventive and productivity-linked services, including health monitoring, nutrition advisory, breeding support, and timely medicine availability, to improve animal health outcomes.

How Did They Do It?

ITC operates this model by assigning one trained paravet to a cluster of 30–40 villages and enabling farmers to raise treatment requests through a digital application when an animal falls sick. The request is routed to the nearest paravet, who visits the farm, examines the animal, and connects with a centrally located qualified veterinarian through video consultation. Based on field observations and symptom inputs, the veterinarian diagnoses the case and issues digital advice or a prescription. Medicines are provided immediately, injectable treatments are administered by the paravet when required, and follow-up consultations are scheduled based on the animal's condition. The service costs around ₹200–₹250 per animal, including medicines. The same infrastructure also supports preventive healthcare, vaccination, deworming, animal breeding services, and advisory support on best animal husbandry practices.



What Other Players Can Learn?

- ITC's phygital veterinary model demonstrates that building a scalable, high-impact rural service delivery network does not require physically placing doctors in every village.
- Tech can be leveraged to amplify the expert reach. A small group of centralized veterinarians can oversee large rural regions when supported by trained field facilitators.
- Using the same last-mile infrastructure for deworming, vaccination, and breeding advice maximizes asset utilization and deepens farmer trust.
- Reducing visit expenses from ₹1,000+ to under ₹250 makes professional veterinary care accessible to smallholders, safeguarding their primary asset.
- Digital call logging, e-prescriptions, and inventory tracking ensure transparency, quality control, and data-driven livestock management.

Case Study

How Did Environmental Defense Fund (EDF), in Partnership with Kumaraguru Institutions, build a Climate-Smart Dairy Entrepreneur Network to Extend Last-Mile Support to Smallholder Farmers?

Priority Area: Advancing extension services, animal health, and climate-resilient dairy management



Pariyur Rural Mart operated by Pariyur FPO



Awareness for Small holder Dairy farmers on Climate Smart practices

The Challenge

Smallholder dairy farmers frequently lack consistent, locally available technical and enterprise support on animal nutrition, breeding, housing, health, fodder management, and milk or dung value addition. Although farmers may receive information or support through periodic trainings, demonstrations, campaigns, or project-based interventions, these one-time engagements are often insufficient to enable sustained adoption of climate-smart dairy practices.

Reaching last-mile smallholder farmers consistently and at scale remains a significant challenge, particularly where access to reliable advisory, quality inputs, animal-health services, market information, and follow-up support is limited. Climate pressures-including heat stress, fodder scarcity, water constraints, and disease risks-make these gaps more consequential by reducing productivity, increasing costs, and creating greater uncertainty in dairy-based livelihoods.

Sustained behaviour change and practice adoption require repeated engagement, context-specific problem-solving, and trusted local support that farmers can access when needed. However, externally delivered programmes and short-duration interventions may not always be able to provide this continuous presence at the village level. Environmental Defense Fund (EDF), in partnership with Kumaraguru Institutions, therefore identified the need to build a decentralised, locally rooted ecosystem of dairy entrepreneurs who could translate climate-smart knowledge into accessible services and maintain ongoing engagement with farmers.

What Did They Do?

EDF, in partnership with Kumaraguru Institutions, established the Climate-Smart Dairy Entrepreneurship Programme in Tamil Nadu to develop technically capable and business-oriented rural dairy entrepreneurs. The first cohort comprised 112 entrepreneurs, trained in breeding, animal nutrition, housing, animal health, and milk value addition, alongside entrepreneurship and enterprise-management capabilities. The entrepreneurs are being supported through field mentoring to reach more than 10,000 smallholder dairy farmers across Tamil Nadu.

A second cohort is planned for training by the end of 2026, progressively expanding the local entrepreneur network and its farmer reach. The programme is also supporting the development of Rural Marts as one-stop service centres for dairy farmers, enabling local entrepreneurs to provide essential dairy and agricultural inputs, services, market linkages, and climate-smart advisory closer to farmer communities. Ten Rural Marts have been established to date, across five districts in Western Tamil Nadu.

How Did They Do It?

The programme combines technical dairy training with entrepreneurship development, mentoring, and applied field exposure. Training includes balanced feeding, forage and fodder options, productivity management, animal health, branding, market positioning, GST basics, sales, and the use of digital tools for business growth. More than 40 entrepreneurs also participated in the Dairy Entrepreneurship Yatra, a cross-regional learning experience covering dairy enterprises, research institutions, and climate-smart models across five Indian states.

An learning management system (LMS) is currently being developed to enable structured, repeatable learning, improve resource access, and sustain entrepreneur engagement beyond face-to-face training. Performance indicators are also being developed to track entrepreneur performance, service delivery, enterprise growth, farmer outreach, and adoption of climate-smart dairy practices.

What Other Players Can Learn?

- Local dairy entrepreneurs can act as an effective last-mile bridge between technical institutions, markets, service providers, and smallholder farmers, making climate-smart advisory and services more accessible.
- Rural Marts can function as one-stop centres for dairy farmers, integrating access to quality dairy and agricultural inputs, basic services, climate-smart advisory, and market linkages through a locally rooted entrepreneur.
- Such centres can reduce the time, travel, and transaction costs farmers face in obtaining reliable inputs and services, while also creating a viable rural enterprise opportunity.
- Combining technical dairy knowledge with entrepreneurship and business-management skills can enable advisory, input, and service delivery to evolve into locally viable enterprises rather than remain time-bound training interventions.
- A phased cohort model allows programmes to expand entrepreneur networks gradually, while adapting the curriculum, mentoring, and support systems based on early implementation experience.

- An LMS can standardise course delivery, enable continued access to learning resources, and sustain engagement after face-to-face capacity building.
- Developing entrepreneur-performance indicators from the outset helps track enterprise viability, farmer outreach, service quality, and climate-smart practice adoption, generating evidence for targeted support and scale-up.
- Partnerships that combine EDF's climate-smart dairy expertise with Kumaraguru Institutions' training and entrepreneurship platform can strengthen the scale and sustainability of rural dairy-service ecosystems.



Long Term Priorities: Embed Climate Resilience into Business Strategy

Over time, companies can move from individual climate resilience interventions towards embedding sustainability and climate resilience into their core business strategy and operating models. This involves institutionalising the practices, systems and partnerships developed in the earlier phases and integrating climate considerations into procurement, supplier engagement, business planning and decision-making.

This is where the dairy sector's climate resilience journey is headed next and also where we expect to see the innovation and activation happening over the coming years, as companies build on the foundational interventions as depicted by the case studies in the previous sections. While practices in this space are still in their early stages of building and adoption, resilience practitioners are already signalling what the long-term embedding could look like:

Procurement and supplier engagement

Integrating climate risks into procurement strategies, for e.g, preferential sourcing and contracting terms for climate-compliant farmer groups and input suppliers' adhering to sustainable practices, so that resilience becomes a criterion embedded in everyday sourcing decisions.

Long -term farmer engagement and incentive mechanisms

Moving beyond one-off training or pilots, towards multi-year engagement models- such a longer-term procurement contacts tied to climate resilient/sustainable practice adoption, or premium pricing linked to verified resilience outcomes, that give farmers the confidence to invest in adaptation over multiple seasons.

Institutionalising sustainability and climate performance indicators

Embedding climate- related KPIs into core business reporting, rather than keeping them part of sustainability disclosures. For example, board level tracking of on farm emission intensity, climate risk exposure or supply chain climate vulnerability, integrated into existing business performance review.

Farm-level data, traceability and MRV capabilities

Strengthening the data collection and verification backbone that underpins all of the above suggestions — building on the MRV foundations established earlier in the resilience journey — through farm-level data collection (e.g. sensor- or app-based tracking of milk yield, inputs, and practices) that feeds directly into company-level GHG inventories and traceability systems.

Long term ecosystem partnerships

Developing co-investment and risk- sharing partnerships across dairy value chain- with farmers/cooperatives, input suppliers, financial institutions and government programmes, to address systemic risks (heat stress, rainfall variability, feed availability, extreme weather events) that no single player of the value chain can manage alone.

04. Looking Ahead



India's dairy sector is at an important inflection point. While demand for milk continues to grow, climate change is increasing risks to milk production, procurement, and supply chain resilience. These challenges are no longer confined to farms, they are becoming critical business risks that directly influence operational efficiency, profitability, and future growth.

The evidence presented in this report suggests that companies embedding climate resilience into procurement strategies, farmer engagement, and productivity programmes will be better positioned to secure reliable milk supplies, manage business risks, and unlock future growth opportunities. Beyond shielding businesses from climate-related disruption, this shift also positions companies to compete globally by aligning with international sustainability standards and buyer expectations and strengthening their edge in export and global value chains.

What a Resilient Dairy Value Chain Looks Like

What would it mean for a company to get this right? A resilient dairy value chain is the one where milk production holds steady despite climate variability, farmers within it remain profitable, supported by feed systems that can absorb shocks milk quality stays consistently high because the chilling, handling, and payment systems around it are reliable, and young farmers stay engaged rather than exiting the sector, because dairy farming remains a viable livelihood.

Climate action is often initiated to address immediate production and supply risks. However, when embedded within core business operations, it also creates the conditions necessary for sustained business growth. A productive and resilient supplier base strengthens procurement security, improves milk quality, and provides the foundation for expanding into higher-value dairy markets.

Companies that embed climate resilience into their business strategy today will be better positioned to:

- Expand value-added dairy product portfolios.
- Enter premium domestic and export-oriented markets.
- Secure consistent access to high-quality raw milk throughout the year.
- Reduce exposure to future climate and market-related disruptions.
- Build stronger, long-term partnerships with milk producers and customers.

Viewed from this perspective, climate resilience is not simply an environmental or sustainability objective—it is a strategic business enabler that strengthens competitiveness and supports long-term growth.



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A global nonprofit with staff in over 30 countries, Environmental Defense Fund (EDF) creates transformational solutions to the most serious environmental problems. To do so, EDF links science, economics, and innovative private-sector partnerships to turn solutions into action.

EDF's approach to support an Indian pathway to shared, sustainable prosperity is well aligned with India's ambition. For more than a decade, EDF has supported India's low carbon development objectives by cultivating strategic partnerships, developing and implementing innovative solutions that address India's priorities. EDF works closely with the government (at national, state, and municipal levels) and Indian industry, academia and thinktanks.

EDF's work in India advances sustainable livelihoods for farmers and fishers, supports the Indian carbon market, drives industrial decarbonization, promotes sustainable business practices, and fosters science and innovation.

Confederation of Indian Industry

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering Industry, Government and civil society through advisory and consultative processes.

For more than 130 years, CII has been engaged in shaping India's development journey and works proactively on transforming Indian Industry's engagement in national development. With its extensive network across the country and the world, CII serves as a reference point for Indian industry and the international business community.

In the journey of India's economic resurgence, CII facilitates the multifaceted contributions of the Indian Industry, charting a path towards a prosperous and sustainable future. With this backdrop, CII has identified "Accelerating Competitiveness: Growth, Resilience, Inclusion, Sustainability, Trust" as its theme for 2026-27, prioritising five key pillars. During the year, CII will align its policy advocacy, institutional initiatives, partnerships, and outreach to support Indian industry in strengthening these five interconnected pillars of competitiveness.

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FACE is CII's Centre of Excellence dedicated to building efficiencies across the agricultural value chain from farm to fork. FACE is charged with the mission of improving competitiveness of India' agriculture and food sector by catalyzing innovation, building capacity and enhancing productivity across the value chain. FACE works with farmers, companies, development institutions and the government to

- Improve on and off-farm productivity through the dissemination of best practices and technological innovation
- Invest in capacity building initiatives and skill development for supply chain participants across the value chain
- Strengthen linkages across the value chain through market access initiatives, thereby reducing losses and increasing farmer incomes

FACE's service portfolio comprises commodity specific value chain assessments and supply chain advisory services for food and agri businesses, training and consulting services in the area of food safety, and sectoral research across different market segments. FACE also works on projects in PPP mode, to develop business models that are scalable and replicable across geographies.

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