

Chart 1: Product positionings, added ingredients and health benefit platforms used by kids' nutritional dairy brands covered in this report.

	'All natural' positioning	'Organic' positioning	Free from' positioning	Added calcium	Added probiotic	Added omega-3	Calcium for bone health	Probiotics for gut health/immunity	Omega-3 for brain development	Multiple health benefits
Case Study 1 - St Ivel Advance Omega-3 milk stumbles					•			•		
Case Study 2 - Yoplait Petits Filous: Successful little rascals	•		•	•	•		•			
Case Study 3 - The Nestlé Munch Bunch Chronicles			•	•	•	•	•			•
Case Study 4 - Nestlé Nesquik – a better-for-you makeover in progress				•						
Case Study 5 - Orangic Valley Family of Farms	•	•	•							
Case Study 6 - Stonyfield Farm harvests bumper sales of kids' yoghurts	•	•	•	•	•	•				
Case Study 7 - PepsiCo freezes out Quaker Milk Chillers				•						
Case Study 8 - Fonterra redefines kids' dairy with 'expert' calcium brand	•		•	•			•			
Case Study 9 - Danone Danonino – Danone chooses omega-3 for brain development			•		•	•		•	•	•
Case Study 10 - Danone takes the No.1 slot in kids' dairy	•		•		•	•		•	•	•