Millers for Nutrition

Strengthening the Business Case for Fortification

June 18, 2026

Creating Commercial Incentives for Adoption and Compliance

Food fortification delivers proven public health benefits, but processors make decisions based on commercial realities. Across many staple food categories, fortification increases costs while competing products may not fortify. As a result, technical assistance alone is rarely sufficient to drive sustained adoption or compliance.

Millers for Nutrition (M4N) addresses this challenge by strengthening the business case for fortification through two complementary approaches. In voluntary markets, M4N helps processors create commercial value from fortified products and build sustainable demand. In mandatory markets, M4N helps ensure that companies investing in fortification are rewarded through greater visibility, stronger market access, and recognition for performance. Together, these approaches seek to make fortification not only a nutrition intervention, but a commercially viable business decision.

Voluntary Markets

Progress To Date*

544

Millers recruited

55

Brands launched

182k

MT additional AF volumes produced

2.6m

Additional people reached

Voluntary Markets – Creating Commercial Demand

In voluntary markets, processors are not required to fortify. Adoption therefore depends on whether companies believe investments in fortification can generate commercial returns through stronger brands, increased sales, access to new customers, or market differentiation. This is particularly challenging in staple food categories such as rice, wheat flour, and edible oil, where margins are often thin and consumers remain highly price sensitive.

M4N supports processors by reducing the commercial risks of launching fortified products and helping them access demand channels that can support sustainable growth. This includes product positioning, packaging and labelling support, buyer connections, institutional procurement opportunities, retail and e-commerce market access, and senior leadership engagement.

Spotlight: India – Demonstrating a Commercial Market for Fortified Rice and Wheat Flour

India provides one of the strongest examples of how commercial demand for fortified staples can be developed. While government-supported programmes successfully scaled fortified rice to millions of consumers, translating this success into sustainable commercial markets remains a key opportunity. Similar concerns exist in packaged wheat flour, where companies face intense competition and uncertain consumer demand.

M4N worked with processors to position fortified products as differentiated consumer offerings rather than social assistance products. Support included product development, packaging and labelling, fortified rice kernel sourcing, retail and e-commerce placement, launch publicity, and institutional buyer linkages, including with the Akshaya Patra Foundation.

Results

- 39 fortified rice and wheat flour brands launched
- 8 additional brands in development
- 113,000 MT of incremental commercial sales volume generated between January 2025 and May 2026
- Fortified wheat flour supplied through institutional feeding programmes reaching approximately 500,000 children across 3,400 schools

Key Insight

Commercial adoption accelerates when processors can access new buyers and differentiate their products. Framing fortification as both a business opportunity and a contribution to national development proved particularly effective with a new generation of progressive millers modernising traditional family enterprises.

Spotlight: Bangladesh – Reducing First-Mover Risk

Bangladesh represents an early-stage voluntary market where adoption remains limited and processors face uncertainty regarding consumer demand, pricing, and return on investment.

Recognising that technical readiness alone would not drive adoption, M4N focused on reducing first-mover risk through direct engagement with C-suite leaders and business owners. Through trusted industry relationships and targeted commercial discussions, M4N helped build confidence in the market opportunity and showed how early adopters could establish a competitive advantage.

This supported the launch of Bangladesh's first nationally distributed fortified rice brand through ACI, alongside the introduction of fortified wheat flour products into the commercial market.

Results

- Bangladesh's first nationally distributed fortified rice brand launched through ACI
- Two fortified wheat flour brands launched
- Commercial proof points established for future market entrants

Key Insight

In emerging voluntary markets, adoption decisions are driven primarily by commercial considerations rather than technical capability. Reducing perceived market risk, demonstrating a credible business case, and securing early commercial success can be more influential than technical support alone.

*KPIs reflect cumulative figures across the 8 M4N voluntary markets. Incremental figures are calculated using the date of each brand's first test result as the baseline.

Mandatory Markets

Progress To Date*

380

Millers recruited

4.5m

MT additional AF volumes produced

205m

Additional people reached

Mandatory Markets – Rewarding Compliance

Mandatory fortification legislation creates a legal obligation to fortify, but it does not automatically create a level playing field.

Across many mandatory markets, enforcement systems remain constrained. As a result, processors that consistently fortify often bear higher production costs while competing against brands that fortify inconsistently or not at all. Over time, this weakens the incentive for responsible processors to maintain compliance.

M4N therefore complements technical assistance with market-based approaches that create tangible business benefits for companies that invest in fortification and product quality. The objective is to ensure that compliance is associated with stronger market visibility, reputation, customer relationships, and commercial opportunities.

Spotlight: Recognising Market Leaders Through MFI and KMFI

One of the most direct ways to strengthen the business case for compliance is to publicly recognise companies that consistently meet fortification standards.

To support this, M4N established the Micronutrient Fortification Index (MFI) in Nigeria and the Kenya Millers Fortification Index (KMFI). These programmes independently assess participating millers against defined fortification performance criteria** and recognise top performers.

By combining benchmarking and recognition, MFI and KMFI encourage continuous improvement while helping compliant millers stand out among regulators, development partners, retailers, and consumers.

Results

- 4 MFI award rounds completed in Nigeria with 18 companies and 36 brands, covering 80%+ of the wheat flour, edible oil, and sugar markets, with an estimated annual reach of 134 million people
- 3 KMFI award rounds completed in Kenya with 30 companies and 155 brands, covering 50%+ of the maize flour, wheat flour, and edible oil markets, with an estimated annual reach of 31 million people

Key Insight

Compliance becomes more sustainable when companies receive visible commercial and reputational benefits for investing in fortification and quality assurance.

Spotlight: Kenya – Connecting Compliant Millers to Last-Mile Markets

Recognition is important but not always sufficient. M4N has therefore complemented recognition programmes with initiatives that strengthen market access for compliant millers.

Kenya illustrates how market linkages can reinforce the business case for fortification while expanding consumer access. Although fortification regulations are well established, many low-income consumers purchase staple foods through informal microretail outlets, or dukas. These microretailers are a critical distribution channel for fortified products but are often disconnected from millers and formal market development efforts.

To address this gap, M4N partnered with TechnoServe's Smart Duka project and the National Duka Owners Umbrella Organization (NDO) to connect millers directly with networks of microretailers. This initiative helped millers better understand Base of the Pyramid (BoP) needs, strengthen distribution relationships, and identify practical solutions to improve access to fortified products.

Results

- 20+ food processors and 500+ microretailers engaged
- 8 market linkage events conducted across key urban and peri-urban markets
- 174 MT of fortified foods valued at approximately USD 145,250 sold through programme-supported channels, strengthening access to fortified products among lower-income consumers

Key Insight

Creating direct market opportunities for compliant millers strengthens incentives for continued fortification while improving access to nutritious foods among underserved populations.

*KPIs reflect cumulative figures across the 16 M4N mandatory markets. Incremental figures are calculated using the date of each brand's first test result as the baseline.

**Fortification performance criteria cover fortification quality and consistency, food safety, quality assurance systems, regulatory compliance, and overall commitment to producing safe and nutritious food.

Annex: Programme Photo Highlights

Voluntary Markets – Creating Commercial Demand

Millers, experts policymakers unite in Punjab to tackle malnutrition

PUNJAB EXPRESS BUREAU
Ludhiana, October 16

Millers for Nutrition, powered by TechnoServe, has brought together millers, nutrition experts, government officials, and industry representatives to discuss how fortification can become a powerful solution to tackle hidden hunger at an event, themed "Unlocking Market Potential: Advancing Fortified Rice in Punjab," this Wednesday at Hotel Park Plaza.

Monojit Indra, Senior Practice Leader at TechnoServe and Program Lead for Millers for Nutrition Asia, said, "India has achieved remarkable success in food production, but we still face deep-rooted challenges in nutrition. Fortification allows us to transform simple staples into nutritious foods that improve health for all. Millers leading the way can make fortified rice a part of every household's diet, and this is also a reflection of how the milling industry can take charge in India's fight against malnutrition."

Millers for Nutrition launch Five New Fortified Food Brands in Kolkata

To reduce malnutrition and hidden hunger, Millers for Nutrition, powered by TechnoServe, united millers, nutrition experts, government officials and industry leaders at Peerless Hotel, Kolkata for the launch of five new fortified food brands. In

Punjab Express coverage of M4N's fortified rice initiatives in Punjab (October 2025)

Hello Kolkata coverage of M4N's brand launches in Kolkata (November 2025)

M4N showcasing newly launched fortified food brands at Gulfood 2026

Mandatory Markets – Rewarding Compliance

Market Linkages Forum facilitating 20+ documented processor–retailer partnerships (Nairobi, 2024)

Eastlands Market Linkage Event, connecting 115+ duka owners with 10+ processors (August 2025)

Kiambu Market Linkage Event, connecting 80+ duka owners with 15+ processors (August 2025)