



ACCESS TO  
**NUTRITION**  
INITIATIVE



# India Spotlight Index 2020

Full report

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## Introduction



"ATNI sees food and beverage companies in India showing their commitment to provide healthy food and engaging in a dialogue on how to support India's Eat Right Movement. Lifestyle changes in India have caused a shift in consumer habits – from the consumption of traditional food, to more urban food habits consisting of packaged and processed foods, high in sugar, fat and salt. In fact, India is among the top 10 consumers of fast food in the world. This, coupled with the fact that India is set to become the third largest consumer economy, presents an enormous opportunity for food and beverage companies to make nutrition a core part of their business plans, and to adopt comprehensive, public, formal and commercial strategies to address issues related to the double burden of malnutrition in India."

Inge Kauer, Executive Director,  
Access to Nutrition Initiative

The Access to Nutrition India Spotlight Index 2020 has been developed by the Access to Nutrition Initiative (ATNI) to drive positive change in the food and beverage industry in India on diet, nutrition and health issues. It is the second iteration of the Index, first published in 2016. It aims to support efforts by all stakeholders, including the government-led Eat Right India movement, to address all forms of malnutrition. It focuses on the contribution being made by the 16 largest food and beverage (F&B) manufacturers in India, by providing comprehensive, independent, comparable and objective information about these companies' policies, practices and disclosure related to nutrition. As such, the Index serves as a private sector accountability tool, which stakeholders can use to hold the companies to account for delivering on their commitments to tackle these important national challenges.

The second India Spotlight Index covers the same topics and takes the same broad approach to assessing companies, and to scoring and ranking them, as the first iteration. After the successful launch of the 2016 Index, ATNI followed up with stakeholders and companies in India to solicit feedback. This input fed into the development of the India Spotlight Index 2020. In the intervening time, the impact of food and beverage companies on the nutrition and health of Indian consumers has risen and is better understood. Read the full research scope of this Index [here](#).

In February 2021, ATNI published the results and analysis of how the companies deal with nutrition beyond the nutritional quality of products, focusing on the following topics: Governance, Accessibility, Marketing, Employee and Consumer Lifestyles, Labeling and Engagement. The chapters also include an impression of how companies are dealing with the effects of the Covid-19 pandemic. The press release for this publication is available [here](#).

The India Spotlight Index 2020 shows an increased commitment to provide healthy food by the 16 largest food and beverage manufacturers in India.

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The food and beverage industry is actively engaging and acting on initiatives and regulatory developments proposed by the Food Safety and Standards Authority of India.

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Current industry efforts are not sufficient to match the scale of the nutrition challenge that India faces.

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Few companies provide evidence of comprehensively tackling undernutrition, micro-nutrient deficiencies, and overweight and obesity, in all relevant business areas.

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Of the 1456 products assessed in the Product Profile 16% meet healthy standards. All companies are to increase the healthiness of their portfolios.

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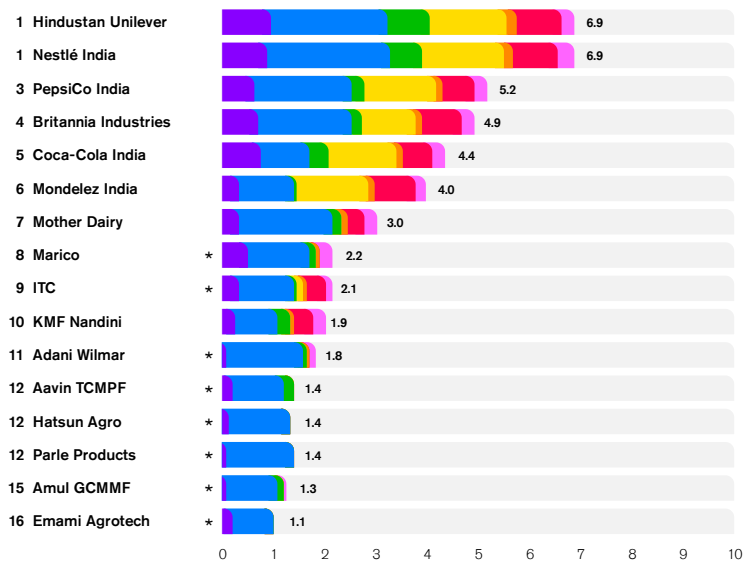
Hindustan Unilever and Nestlé India rank joint first with a score of 6.9 out of 10.

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Britannia Industries and Cola-Cola India have shown substantial individual progress across most elements of the Index since 2016.

# Ranking

## Overall Ranking



Hindustan Unilever and Nestlé India rank joint first with a score of 6.9 out of 10. There has been some progress among the nine previously assessed companies and their average score increased from 3 in 2016 to 4.2 in 2020. Two companies have shown substantial individual progress across most elements of the Index since 2016: Britannia Industries (1.6 to 4.9) and Coca-Cola India (2.4 to 4.4). However, the average Index score is 3.1 out of 10, similar to that of the 2016 iteration.

- A** Governance
- B** Products
- C** Accessibility
- D** Marketing
- E** Lifestyles
- F** Labeling
- G** Engagement

\* Did not provide information to ATNI

India Spotlight Index 2020 Research Scope

URL: <https://new-l40rlzsq.accessstonutrition.org/index/india-spotlight-2020/>



# Companies

The 16 largest food and beverage manufacturers were selected based on 2018 retail sales, for the India Spotlight Index 2020. Together, they accounted for 31% of India's packaged food and beverage market share with a combined total retail sales of just over INR 1800 billion.



Aavin TCMF



Adani Wilmar



Amul GMMF



Britannia Industries



Coca-Cola India



Emami Agrotech



Hatsun Agro



Hindustan Unilever



ITC



KMF Nandini



Marico



Mondelez India



Mother Dairy



Nestlé India



Parle Products



PepsiCo India

# Findings

The India Spotlight Index 2020 shows some progress on nutrition among the 16 largest food and beverage manufacturers in India. These companies account for nearly a third of the food and beverage market. Most are taking action to fortify their products or have committed to reformulate their products in line with the Government's initiatives to address India's nutrition challenges. However, few provide evidence of comprehensively tackling undernutrition, micro-nutrient deficiencies, and overweight and obesity, in all relevant business areas. Current industry efforts are not sufficient to match the scale of the nutrition challenge that India faces.

**The food and beverage industry is actively engaging and acting on initiatives and regulatory developments proposed by FSSAI. However, the overall 'healthiness' of Indian food and beverage manufacturers' product portfolios, as well as their public disclosure of nutrition-focused initiatives and progress, remain low.**

- Ten of the 13 companies, for which staple food fortification is relevant, voluntarily fortify some or all of their products according to the standards set by FSSAI.
- Hindustan Unilever, Nestlé India and PepsiCo India have developed comprehensive, public, formal commercial strategies to address issues related to the double burden of malnutrition in India. Britannia Industries and ITC are the only India-headquartered companies that have a nutrition policy in place.
- The performance of the companies with the highest scores (Hindustan Unilever, Nestlé India) is comparable to their results in 2016. Both companies have evidenced plans to do more in future. Mother Dairy and Marico lead in Dairy and Edible Oils – their respective industry segments.
- Britannia Industries and Coca-Cola India have improved the most since 2016, with higher scores in at least five of the seven Index categories.
- Five of the companies' commercial strategies refer, to some extent, to the nutrition and health priorities set out by the Indian Government in the National Nutrition Strategy and *POSHAN Abhiyaan*. In its business strategy for the Indian market, Nestlé India does this comprehensively, defining how it aims to reach groups experiencing, or at high-risk of experiencing malnutrition.
- Most companies have limited disclosure of their activities and initiatives in India. Hindustan Unilever stands out with the highest score for public disclosure of its policies and practices.

**Less than a third (27%) of the estimated 2018 sales of packaged foods and beverages in India of the 16 companies assessed is derived from healthy products. These sales come from 228 products (16% of 1456 assessed). Although the research did not find conclusive evidence of an increase in the percentage of healthy products across companies' portfolios since 2016, more companies provided data to allow for a more accurate assessment. This led to a modest increase in the estimated sales derived from healthy products.**

- For the nine companies assessed in both Indexes, the estimated sales from healthy products<sup>1</sup> increased from 15% in the 2016 India Index to 23% currently. However, the research found no increase in the percentage of healthy products, by number, in the companies' overall portfolios. The number of companies that provided comprehensive product nutrient content data to ATNI for the product assessments increased from three to seven, improving the quality of this assessment.
- Out of 13 companies that sell staple products covered under FSSAI's (Fortification of Foods) 2018 Regulation, 10 voluntarily fortify their staple products to help address micronutrient deficiencies in India. Only Mother Dairy and Britannia Industries fortify all products in their portfolios that are covered by the Regulation. The three companies that do not manufacture products covered by FSSAI's mandate (Coca-Cola India, Mondelez India and PepsiCo India) were found to fortify other products to address micronutrient deficiencies for specific consumer groups in India.
- Having joined FSSAI's initiatives to support the Eat Right Movement, six of the 16 companies have made public pledges to reformulate their products. Four additional companies make other commitments to make their products healthier.
- Hindustan Unilever, Nestlé India and PepsiCo India stand out as having the most comprehensive reformulation targets. Fewer than half of the companies define targets for reducing salt/sodium, saturated fat and added sugar/calories.
- Of the 16 companies, four have a strategy or target to address affordability and physical accessibility of their healthy products<sup>2</sup> This indicates that most companies are not showing if and how they market their healthier products to Indian consumers whose access to these products is constrained by low-income or by location. For example, targeting consumers living in certain rural or urban areas, or those present in aspirational districts.
- Seven of the 16 companies label sodium content on the back-of-packs, which is three more than in 2016. In terms of front-of-pack (FOP) labeling, five companies have made a public commitment to declare FOP nutrition information. A dialogue on interpretive FOP labeling is ongoing between the Government, industry and other stakeholders in India, but no interpretive FOP labeling has been implemented yet.

**Given the high levels of undernutrition and rising obesity levels in children in India, it is important for companies to either selectively market their healthy products to children, or not to market any products to them at all. Presently, six of the companies have a responsible marketing policy that includes commitments about marketing to children. However, none of the companies specifically state that they apply the recently adopted World Health Organization (WHO) South-East Asia Region (SEAR)**

## **nutrition criteria or incorporate them into their marketing policies.**

- Only 12% (183 products) of the nearly 1,500 products analyzed meet the WHO nutrition criteria for marketing to children, highlighting the need to address responsible marketing in comprehensive policies.
- Coca-Cola India and Mondelez India commit not to market any of their products to children, an approach that is considered equivalent to applying the WHO SEAR nutrition criteria. They apply this commitment to children under the age of 12.



# The Indian Context

India continues to face a double burden of malnutrition,<sup>3</sup> defined as the simultaneous manifestation of both undernutrition and overweight and obesity. Malnutrition not only directly affects people's physical growth and health but also their cognitive development and abilities. It has been identified as one of the principal factors limiting India's economic growth potential. The opportunities are equally enormous; cost-benefit ratio analyses of nutrition interventions to reduce stunting in the first year of life report a monetary return (higher wages) later in life of 18:1 per child, and similar analyses found that a 1 cm increase in adult height due to nutrition interventions was associated with a 4% increase in wages for men, and 6% for women.<sup>4</sup>

In recognition of India's nutrition challenges, in early 2018, the Government launched the National Nutrition Mission (NNM), also known as *POSHAN Abhiyaan*, with ambitious targets to reduce various forms of malnutrition and substantial associated budgets. It has also led many initiatives such as the Integrated Child Development Scheme (ICDS), the Mid-Day Meal Scheme, the Maternity Benefit Program and the Public Distribution System (PDS), which all provide food at subsidized rates. The Food Safety and Standards Authority of India (FSSAI) has developed a range of guidelines and standards for food manufacturers, and works with many stakeholders active in the food system.<sup>5</sup>

Aligning with FSSAI's wide-scale staple foods fortification standards, the Ministry of Women and Child Development has issued new directives to mandatorily use fortified rice, as well as fortified wheat flour and edible oil, in the Mid-Day Meal schemes and public nutrition programs under the ICDS across India since December 2019.<sup>6</sup> To further this agenda, in 2019, the Ministry of Consumer Affairs, Food and Public Distribution has approved a 3-year pilot scheme for the fortification of rice with iron, folic acid and vitamin B-12 under the PDS in 15 districts of India.<sup>7</sup>

The food and beverage sector is the fifth largest manufacturing sector in India.<sup>8</sup> Lifestyle changes in India have caused a shift in consumer habits – with an increased consumption of sugar, fat and salt. India is one of the top 10 consumers of fast food in the world<sup>9</sup> and is set to be the third largest consumer economy by 2025.<sup>10</sup>

Almost two-thirds of the disease burden in India is due to lifestyle diseases.<sup>11</sup> Many of these diseases are diet-related non-communicable diseases that link with changes in diets and eating patterns. Several factors have led to the increased consumption of products from the fast-growing food and beverage segments in India (Breakfast Cereals; Savory Snacks; Seasonings, Dressings and sauces; Naturally Healthy Beverages; Ready Meals; Confectionery; Organic Food; Dairy Food; Bakery).<sup>12</sup>

When considering these factors and segments, combined with the enormous total consumer base of over 1.25 billion, the opportunity is clear for existing as well as new players in the fast growing food and beverages market to develop healthy, affordable and tasty products to improve the diets and health of India consumers.

# Novelties and Best Practices

- Britannia Industries has improved the most since 2016 across all Index categories. The company has formalized its commitments and approach to addressing malnutrition in India in its newly developed Britannia Nutrition Policy.
- Coca-Cola India has achieved the second greatest improvement across all Index categories due to new initiatives that aim to align with the Government's efforts for achieving *Kuposhan Mukh Bharat* – free from malnutrition, across the lifecycle. These include improving the distribution of its Minute Made Vitingo product to address iron deficiency in children, the launch of new healthy products within the Dairy product category, and the development of a 'Compare our Products' tool for its website so customers can find more nutrition information online.
- Adani Wilmar publicly discloses its support to Government programs and interacts with stakeholders to address undernutrition in India by focusing on food security.
- Mother Dairy has committed to tackling undernutrition and micronutrient deficiencies in India through its strategic focus on food fortification and reformulation. The company voluntarily fortifies all relevant products – its entire range of Milk and Edible Oil products – according to FSSAI's (Fortification of Foods) Regulation, 2018. In addition, the company has implemented a robust employee health and wellness program called the Safe & Nutritious Initiative @ Mother Dairy. This is in line with FSSAI's Safe and Nutritious Food at Workplace nationwide campaign (SNF@Workplace), which provides guidance to help people eat safe and healthy diets at work (see the campaign's key resource [The Orange Book](#)).
- Hindustan Unilever has adopted notable nutrition-focused approaches to reformulation, market research and product pricing. Its Unilever Sustainable Living Plan outlines how it intends to reformulate products to reduce salt, sugar and saturated fat content. The company utilizes datasets from the People Data Centre report, and other sources, to gain insight into nutrition and health issues in regions where the company is active, and to identify unmet needs. Its strategy includes specifically defining appropriate price points for healthy products targeted towards consumer groups at high risk of malnutrition in India.
- Mondelez India has a comprehensive approach to responsible marketing to children. It's the only company to achieve full score with regards to its digital marketing arrangements in order to place age restrictions. Further, it does not conduct any marketing activities in primary or secondary schools. It is also the only company that excludes product or brand-level promotion from its consumer-oriented health and nutrition programs.
- Nestlé India comprehensively engages with internal and external stakeholders to improve its commercial nutrition strategy, and to support the development of public sector strategies aimed at tackling malnutrition in India. It also scores well by way of its strategies to prevent food loss and waste, such as its fresh milk district model for direct procurement in Moga.
- PepsiCo India has developed new healthy products in line with its Performance with Purpose 2025 agenda and its reformulation efforts, which align with FSSAI's Eat Right Movement.

# Recommendations

## **ATNI recommends that the largest food and beverage manufacturers in India:**

- Adopt clear and comprehensive commercial strategies to address India's malnutrition challenges, which include targets for all Index topics/categories, and which contribute to national initiatives, such as the National Nutrition Strategy and *POSHAN Abhiyaan*, and the Sustainable Development Goals of India.

Focus their efforts on population groups that are malnourished or are at high risk of malnutrition, by defining objectives adapted to the diverse nutritional needs of the states in which the companies are active.

- Adopt and implement policies that are appropriate and specific to India, and that align with various regulatory and stakeholder initiatives to address malnutrition in India.
- Define nutrition criteria for their products, aligned with an internationally recognized NPS, and increase investment in developing and selling products that meet healthy nutrition criteria.
- Manufacture healthier products across all categories and disclose the percentage of products that meet the company's healthy standard.
- Improve the affordability and physical accessibility of healthy products by defining in commercial strategies specific approaches and well-defined targets that relate to pricing and distribution, and that can be tracked.
- Adopt comprehensive responsible marketing policies, or strengthen existing ones, by explicitly codifying general responsible marketing principles and specific commitments regarding marketing to children – including teenagers. This should involve application of the WHO SEAR criteria and addressing marketing in and near schools.
- Implement an interpretive FOP labeling system as soon as possible, by working with other companies via industry associations, and in partnership with the Government and other relevant stakeholders.
- Be more transparent in reporting on all nutrition commitments, policies and practices as they relate to India and/or specific states, and especially in reporting progress on meeting nutrition-related targets.
- Provide ATNI with relevant information to allow for the best possible, comprehensive assessment of their policies and practices.

# Future Opportunities

The Access to Nutrition India Spotlight Index is a private sector accountability tool. ATNI's goal in compiling the Index is to enable all stakeholders to use its findings and recommendations in their work to encourage India's largest food and beverage manufacturers to address the country's substantial, and mounting, health challenges linked to diet and nutrition. By providing objective, comparable information and data, ATNI hopes to enable the companies themselves, and their stakeholders, to track the progress of these influential manufacturers in improving policies, practices and disclosure, as well as the nutritional quality of their products over time.

After the publication of this second India Spotlight Index, ATNI will follow up with one-to-one meetings with each company to review the findings and recommendations. It will also present and solicit feedback on the results at different fora in India. ATNI will also publish, on a rolling basis, thematic 'deep dives' that outline the findings for specific categories of the Index following the publication of the main results.

# Category Rankings



## Category A: Governance

Corporate strategy, management and governance (12.5% of overall score)

The India Spotlight Index assesses companies' nutrition-related commitments, practices and disclosure. It is organized into three sections: nutrition governance and management; formulating and delivering appropriate, affordable and accessible products; and influencing consumer choice and behavior. The three sections are further divided into seven thematic Categories.

The results of Category A are presented here. For a food and beverage company to improve all aspects of the business that affect access to nutrition, its commitment must depart from its commercial strategy.

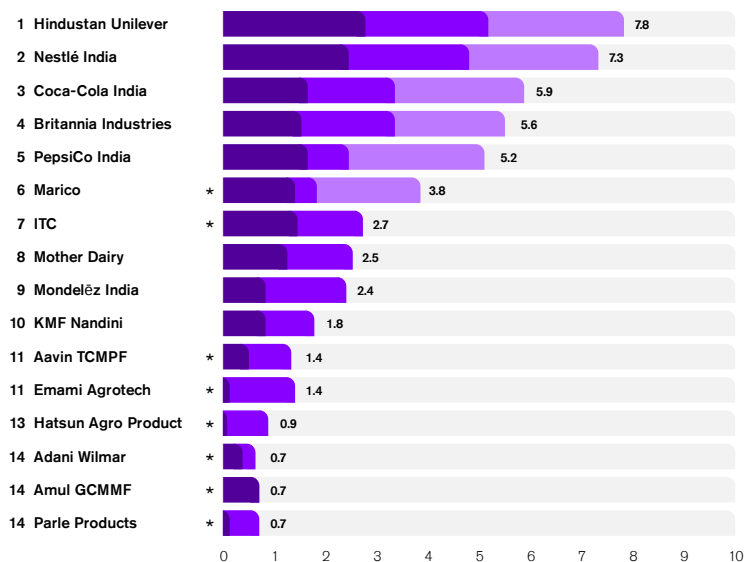
This allows the prioritization of the better nutrition outcomes from the moment of planning, as well as in the allocation of resources, implementation and evaluation. It is equally important that companies also support or join governments' initiatives to prevent and address obesity and / or undernutrition, not only to ensure alignment with public health priorities as identified by the relevant authorities, but also because they are needed to and can make a significant contribution. This Category A assesses the extent to which a company's strategy for the Indian market includes a specific commitment to contributing to better diets and whether its approach is embedded within its governance and management systems. The quality of its reporting is also analyzed.

### Category A consists of three criteria:

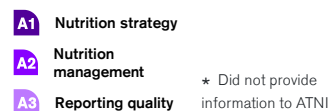
- A1 Corporate nutrition strategy
- A2 Nutrition governance and management systems
- A3 Quality of reporting

### To perform well in this category, a company should:

- Have a mission and commercial strategy focused on health and nutrition factored into all major business decisions and functions;
- Take action to address the double burden of malnutrition in line with national nutrition priorities and has a focus on people experiencing or at high risk of malnutrition
- Assign oversight of its nutrition strategy and/or programs to the CEO and undertakes regular internal audits and reviews;
- Implement a certified food safety management system and track and prevent food loss and waste centrally
- Comprehensively report on its approach to preventing and tackling all forms of malnutrition in India



Hindustan Unilever and Nestlé India rank first and second in Category A, with the most comprehensive nutrition strategies, management systems and reporting among the companies assessed. Since the India Spotlight Index 2016, where nine of the current 16 companies were assessed, Britannia Industries shows the most significant improvement in this Category, moving from a score of 3.3 to 5.6 in 2020. With a new score of 5.9, Coca-Cola India also improves considerably upon its 2016 score of 4.9.



## Context

Malnutrition is one of the principal limitations of India's global economic potential (Copenhagen Consensus, 2012). should commit to delivering more affordable, healthy products, while making specific references to reaching groups that experience or are at a high risk of malnutrition with such products. As a result, how a company comprehensively addresses all forms of malnutrition (including undernutrition, micronutrient deficiencies, obesity and diet-related diseases) should be based on the specific nutrition issues in the Indian market, as defined by public authorities. The results from the first phase of the fifth and the latest round of the National Family Health Survey (NFHS-5), conducted in 2019-2020, indicate a decline in nutritional status of children under 5 years. Anemia among women also remains a major cause of concern and obesity among adults is increasing.

Socioeconomic, geographic (urban/rural, states, districts, etc.) and health and nutritional factors are relevant in identifying the needs of groups experiencing or at a high risk of . In addition, companies should also recognize the nutrition and health priorities set out in the and Vision 2022 – Kuposhan Mukh Bharat and/or POSHAN Abhiyaan (Prime Ministers' Overarching Scheme for Holistic Nourishment) <sup>13</sup> as part of India's National Development Agenda in the development of their nutrition strategies .



## How are nutrition strategy, management systems and reporting relevant to the COVID-19 crisis?

- India's focus on the dual burden of malnutrition (NITI Aayog's National Nutrition Strategy 2017, and *POSHAN Abhiyaan*) is very relevant in light of COVID-19, as overweight/obesity increases risk of negative COVID-19 outcomes, and undernutrition and micronutrient deficiencies may reduce immune function.
- It is essential that India's leading food and beverage companies focus more than ever on healthy diets and good nutrition during crisis. They should redouble their efforts to adhere to all relevant product standards, responsible marketing practices and responsible use of health and nutrition claims in line with government/Food Safety and Standards Authority of India (FSSAI) guidance. Product fortification should be intensified and efforts to ensure such products reach those who need them increased, as recommended by FSSAI.
- As highlighted in ATNI's report on the impact of COVID-19 in India, for the companies assessed in the India Spotlight Index 2020 publicly disclosed information about their response against COVID-19 at the country level is limited. This has hampered ATNI's work in assessing the impact of actions taken in almost a year since the pandemic began. India Index companies are encouraged to report publicly on their approaches to dealing with COVID-19.
- Companies must also ensure value chain stability, employee safety and job security. Although the India Spotlight Index 2020 research did not include indicators to score and rank companies' responses to the COVID-19, ATNI did talk to companies about their initial coping strategies and responses to the pandemic between March and June 2020. ATNI has been tracking publicly available information on industry's response globally to the COVID-19 crisis, including in India, and reported on trends, best practices and areas of concern in separate reports. Read more about how companies can positively contribute to addressing the global nutrition challenges in ATNI's COVID-19 Project.

## Main messages

- Hindustan Unilever is a leader in the area of corporate strategy, governance and management, with a score of 7.8; followed by Nestlé India (7.3). While the latter ranked first in the 2016 Index, Hindustan Unilever's strong disclosure has boosted its score and resulted in it leading this Category Governance overall.
- In general, most companies (14) commit to placing a strategic focus on nutrition and health, and to delivering more healthy products. Eight of them also make specific references to reaching groups that experience or are at risk of malnutrition when committing to deliver more healthy products.
- In contrast, only five companies make the commitments in their nutrition strategy specific by recognizing the nutrition and health priorities set out in the National Nutrition Strategy and Vision 2022 and/or in *POSHAN Abhiyaan*. Nestlé India stands out for its comprehensive approach: it is the only company to refer to all groups experiencing or at risk of malnutrition.
- Companies' performance on other elements that are indicative of integrating a focus on nutrition into their core commercial strategies and management systems is similarly variable. Nine companies reported that healthy products have contributed positively to their financial performance in the last three years, five conduct regular nutrition-related business risk assessments and seven state that they have assigned oversight for implementing their nutrition strategy to a CEO or board-level committee. Only Hindustan Unilever and Nestlé India report having undertaken comprehensive market research to assess unmet needs of groups experiencing or at high risk of undernutrition and/or micronutrient deficiencies. Together with PepsiCo India, these are the only three companies that specifically address the double burden of malnutrition in their commercial strategies. Further, all but three companies (for which no information was found) obtained recognized food safety certifications.
- A new aspect of the 2020 India Index is an assessment of the extent to which companies have mechanisms in place to prevent and reduce food loss and waste in the production process. In this regard, six companies include food loss and waste tracking and prevention tools in their management systems, which include value stream mapping and setting key performance indicators (KPIs).
- Only six of the companies publish formal, regular reports on their approach to preventing and tackling malnutrition in India, with most of those covering the dual burden of malnutrition to some extent. Indian subsidiaries of companies with headquarters outside India report most comprehensively and attain the highest scores in Category A overall but, compared to the 2016 India Index, India-headquartered companies, such as Britannia Industries and Marico, have decreased the reporting gap by reporting formally.

## Novelties and best practices

### **Hindustan Unilever undertakes market research to assess unmet needs of groups experiencing or at high risk of malnutrition**

Hindustan Unilever is one of two companies that have undertaken comprehensive market research to assess unmet needs of groups experiencing or at high risk of undernutrition and/or micronutrient deficiencies. Hindustan Unilever uses datasets from Government-led surveys such as the National Family Health Survey (NFHS) and the National Nutrition Monitoring Bureau (NNMB) to identify nutritional gaps and needs that the company wishes to meet.

### **Nestlé India prevents food loss in its Moga milk procurement program**

Among the initiatives Nestlé has in place to prevent food loss and waste, its India's fresh milk district model in Moga for direct procurement is notable, which enables the company to provide logistical support to farmers to prevent wastage of milk or compromise its quality during transit. The model is an easy-to-implement, cost-efficient measure that helps the company to ensure that only high-quality milk is used in its products. The company also deploys cold chain mechanisms to secure the quality of milk during transit, collects milk twice a day so that farmers have zero storage expenses, while ensuring uniform storage conditions for milk throughout the value chain and avoiding milk waste.

### **India-headquartered companies Britannia Industries and ITC publish nutrition policies**

Britannia Industries and ITC are the only two India-headquartered companies to have formalized their commitments and approaches on addressing nutrition and nutrition-related issues in India. [Britannia Industries' Nutrition Policy](#) (newly adopted since the 2016 assessment) is publicly available. The policy provides consumers with the company's overarching nutrition-related objectives on various parameters such as nutrients to limit and encourage; the company's R&D focus on development of healthier product choices; commitments to address country-specific malnutrition, defining nutrition criteria; and commitments on nutrition labelling, claims and responsible marketing. [ITC's Food Products Policy](#) (also publicly available) outlines elements to tackle undernutrition through micronutrient fortification and affordability strategies and overweight and obesity through reformulation.

# A1 Corporate nutrition strategy

The India Spotlight Index 2020 shows some progress on nutrition among the 16 largest food and beverage manufacturers in India. These companies account for nearly a third of the food and beverage market. Most are taking action to fortify their products or have committed to reformulate their products in line with the Government's initiatives to address India's nutrition challenges. However, few provide evidence of comprehensively tackling undernutrition, micro-nutrient deficiencies, and overweight and obesity, in all relevant business areas. Current industry efforts are not sufficient to match the scale of the nutrition challenge that India faces.

## How widespread are companies' strategic commitments to delivering better nutrition in India?

- As Table 1 shows, there is clear evidence that most companies commit to placing a strategic focus on nutrition and health in India, articulated either through their mission statement, a strategic commitment to grow through health and nutrition, or both. This commitment had already been made at the time of ATNI's 2016 Index by all the companies assessed at the time, except for Amul. It is encouraging to see that Amul has now also articulated this commitment, as well as many of the companies being assessed for the first time in 2020. In 2016, only Nestlé India, Hindustan Unilever and PepsiCo India articulated such a commitment through both a mission statement and a commitment to grow through health and nutrition and to be leaders in this area. This 2020 Index shows that ITC, Mother Dairy, Marico, and Britannia Industries have followed suit.
- While the majority of companies (14) state a commitment to deliver healthier foods in India, only seven make a specific reference to reaching groups experiencing or at high risk of malnutrition. Still, in comparison with the 2016 Index (where only Nestlé India and PepsiCo India demonstrated leadership in this area), this is a notable improvement.
- Further, only five companies recognize the nutrition and health priorities set out in the National Nutrition Strategy and Vision 2022 – *Kuposhan Mukh Bharat* and/or *POSHAN Abhiyaan* as part of India's National Development Agenda in their nutrition strategy. Nestlé India is the only company comprehensively referring to the priorities set out by national authorities.

**Table 1. Commitments to health and nutrition, including malnutrition**

	Commits to placing a strategic focus on health and nutrition	Commits to delivering more healthy products	Commits to reaching groups that experience or are at high risk of malnutrition
Aavin TCMPPF* (new)	•	•	•
Adani Wilmar* (new)	•	•	
Amul GCMMF*	•	•	•
Britannia Industries	•	•	•
Coca-Cola India	•	•	
Emami Agrotech* (new)			
Hatsun Agro Product* (new)			
Hindustan Unilever	•	•	•
ITC* (new)	•	•	•
KMF Nandini (new)	•	•	•
Marico* (new)	•	•	
Mondelez India	•	•	
Mother Dairy	•	•	•
Nestlé India	•	•	•
Parle Products*	•		
PepsiCo India	•	•	

\* Did not provide information to ATNI

- Table 2 highlights important elements of companies' performance with respect to integrating nutrition in their decision-making process. However, fewer companies succeed in translating the commitments shown in Table 1 into governance practices. For instance, only five companies conduct nutrition-related business risk assessments at least every 2 years.
- In addition, Table 2 shows that only five companies undertook a strategic review of commercial opportunities available to them by addressing the specific needs of groups that experience or are at high risk of malnutrition. However, none of the five conducted a comprehensive assessment that was then reviewed by their respective board.
- Only four companies were found to have undertaken market research or other types of studies to assess unmet needs of groups experiencing or at high risk of undernutrition and/or micronutrient deficiencies. Nestlé India and Hindustan Unilever are the only companies that have conducted such research for all states where they are present.
- In ATNI's 2016 Index, five of the currently assessed companies (Mondelez India, Nestlé India, PepsiCo India, Coca-Cola India, and Hindustan Unilever) recognized that they had a role to play in tackling India's challenges of increasing levels of obesity and diet-related chronic diseases. For the 2020 Index, ATNI has raised the bar: companies were asked about how they intended to tackle those issues, as described in their formal commercial strategies. Not all of the previously mentioned companies have met this new standard, although some newly assessed companies do (ITC, KMF Nandini, Marico). Furthermore, six of the 16 Index companies set out how they intend to address undernutrition and/or micronutrient deficiencies in their formal commercial strategies, as Table 2 shows.
- Finally, one way to evaluate whether companies deliver on the strategic commitments they make is to assess how healthy products contribute to the company's financial performance. Nine of the 16 companies provided such information to ATNI (growth of the revenue of healthy products, either in absolute or relative terms). However, four lead the way by publicly disclosing this information – ITC, Marico, Hindustan Unilever and Amul.

**Table 2. Overview of performance indicators linked to integrating nutrition in the decision-making process**

	Conducts nutrition-related risk assessments (at least) biannually	Conducted a strategic review of commercial opportunities re. addressing malnutrition	Conducted market research to assess needs re. undernutrition	Addresses undernutrition in its formal commercial strategy	Addresses obesity in its formal commercial strategy
Aavin TCMPPF* (new)					
Adani Wilmar* (new)					
Amul GCMMF*					
Britannia Industries		•		•	
Coca-Cola India	•	•	•	•	
Emami Agrotech* (new)					
Hatsun Agro Product* (new)					
Hindustan Unilever	•	•	•	•	•
ITC* (new)					•
KMF Nandini (new)					•
Marico* (new)					•
Mondelez India	•	•			
Mother Dairy	•			•	
Nestlé India		•	•	•	•
Parle Products*					
PepsiCo India	•		•	•	•

\* Did not provide information to ATNI

## Recommendations

To improve and accelerate efforts towards improving consumers' nutrition, food and beverage manufacturers in India are encouraged to:

- Further integrate nutrition considerations in their core business functions. Companies taking this approach are likely to have a greater and more sustainable impact on improving Indian consumers' access to nutritious foods, and on the population's health, than those companies that attempt to address these issues as isolated from other corporate decisions. Thus, companies are encouraged to develop a formal nutrition policy or strategy that is part of their overall commercial strategy, including their objectives and activities related to nutrition (specific to India), and to publicly disclose the strategy.
- Further translate commitments into specific actions. Compared to the 2016 Index, the 2020 Index results show stronger and renewed commitments in this area. However, these commitments must now be translated into concrete and measurable governance practices.
- Determining business opportunities to address malnutrition requires a careful analysis of the population's nutritional needs, as defined by public authorities – a complex process. Yet only a few companies have taken steps in this direction, by means of strategic reviews or market research. More opportunities would be discovered to tackle malnutrition if more companies were to do this.
- Demonstrate how they support the nutrition and health priorities set out in the National Nutrition Strategy and *POSHAN Abhiyaan* through their commercial operations.
- Promote healthy products further. All companies should already have clear plans and targets in place to increase sales of their healthy products. Companies are also encouraged to publicly report on progress towards these targets.



## A2 Nutrition governance and management systems

The India Spotlight Index 2020 shows some progress on nutrition among the 16 largest food and beverage manufacturers in India. These companies account for nearly a third of the food and beverage market. Most are taking action to fortify their products or have committed to reformulate their products in line with the Government's initiatives to address India's nutrition challenges. However, few provide evidence of comprehensively tackling undernutrition, micro-nutrient deficiencies, and overweight and obesity, in all relevant business areas. Current industry efforts are not sufficient to match the scale of the nutrition challenge that India faces.

### **Do companies have effective management systems to deliver their commitments on nutrition?**

- The level at which companies assign ultimate accountability for implementing their nutrition strategies is indicative of the priority assigned to achieving results. As Table 3 shows, Britannia Industries, Hindustan Unilever, Mondelez India and Nestlé India are the only four companies that assign such responsibility to a CEO or an executive that reports directly to the board. Britannia Industries and Hindustan Unilever lead in this regard by publicly disclosing this information. Furthermore, Mondelez India has improved since ATNI's 2016 Index, when the company assigned this responsibility to a committee that reported to the board.
- Another way to evaluate whether companies have effective management systems to deliver their commitments on nutrition is to assess whether the delivery of their nutrition plans or strategies is subject to an annual standard internal audit and/or an annual management review. Significantly, only Nestlé India and Hindustan Unilever report conducting both; the latter leads this area by publicly disclosing this information.
- All but three companies (for which no information was found) obtained recognized food safety certifications.<sup>14</sup> Thirteen of the sixteen assessed companies obtained ISO 22000:2005 certification; and Coca-Cola India is the only company among these that has already moved on to ISO 22000:2018 certification.<sup>15</sup>

**Table 3. Oversight mechanisms in place for companies' nutrition strategy and/or programs**

	Who (what function) has oversight for implementing the company's nutrition strategy and/or programs?						Is such strategy/program subject to an annual internal audit and/or management review?	
	CEO or executive reporting directly to the Board	Committee reporting to the Board	Senior manager one level below Executive	Less senior staff member	No oversight	No information	Annual internal audit	Annual management review
Aavin TCMPF* (new)						•		
Adani Wilmar* (new)						•		
Amul GCMMF*						•		
Britannia Industries	•							
Coca-Cola India		•						
Emami Agrotech* (new)		•						
Hatsun Agro Product* (new)						•		
Hindustan Unilever	•						•	•
ITC* (new)				•				
KMF Nandini (new)				•				
Marico* (new)						•		
Mondelez India	•							
Mother Dairy		•						
Nestlé India	•						•	•
Parle Products*						•		
PepsiCo India						•		

\* Did not provide information to ATNI

### What are companies doing to prevent food loss and waste?

- A new element of the 2020 Index is consideration of the actions taken by companies to prevent food loss and waste (FLW). Minimizing FLW makes a substantial contribution to increasing access to food but it is a topic that few companies seem to be addressing. However, six companies have incorporated FLW tracking and prevention tools into their management systems. Nestlé India leads in this area not only because of the number of measures in place but also because it published a commitment to reduce FLW in 2015. Nestlé India's fresh milk district model in Moga for direct procurement is highlighted as best practice.

### Recommendations

To improve and accelerate their efforts towards robust nutrition governance and management systems, food and beverage manufacturers in India are encouraged to:

- Ensure that accountability for implementing the nutrition strategy is clearly assigned to specific, relevant functions within the business with the capacity to drive the nutrition agenda.
- Ensure that nutrition plans and strategies are assessed regularly by internal audit and/or are subject to an annual management review to monitor progress. ATNI is concerned that only two companies have such measures in place.
- Food adequacy is intrinsically linked to sustainability. Food needs to be available and accessible at all times, in the present and for future generations; FLW threatens both current and future food accessibility.

**Table 4. Food loss and waste tracking and prevention tools included in management systems**

	Including FLW within KPIs at executive management level	Value stream mapping along production chain	Application of FLW Accounting and Reporting Standard	Other(s)
Aavin TCMPPF* (new)				
Adani Wilmar* (new)				
Amul GCMMF*				
Britannia Industries		•		
Coca-Cola India				•
Emami Agrotech* (new)				
Hatsun Agro Product* (new)				
Hindustan Unilever	•			
ITC* (new)				
KMF Nandini (new)				
Marico* (new)		•		
Mondelez India		•		
Mother Dairy				
Nestlé India	•			•
Parle Products*				
PepsiCo India				

\* Did not provide information to ATNI

## A3 Quality of reporting

The India Spotlight Index 2020 shows some progress on nutrition among the 16 largest food and beverage manufacturers in India. These companies account for nearly a third of the food and beverage market. Most are taking action to fortify their products or have committed to reformulate their products in line with the Government's initiatives to address India's nutrition challenges. However, few provide evidence of comprehensively tackling undernutrition, micro-nutrient deficiencies, and overweight and obesity, in all relevant business areas. Current industry efforts are not sufficient to match the scale of the nutrition challenge that India faces.

### **How frequently and comprehensively do companies report on their efforts to tackle the double burden of malnutrition in India?**

- Six of the sixteen companies in the 2020 Index publish formal, annual reports that discuss their respective approaches to tackling nutrition issues in India. Such transparency is considered best practice. Nestlé India, Hindustan Unilever and Coca-Cola India all published annual reports at the time of the India Spotlight Index 2016 and continue to do so. Britannia Industries used to be the only India-headquartered company to publish an annual report in 2016. Currently, both Britannia Industries and Marico (new to the 2020 India Index) do so. Since the 2016 Index, PepsiCo India, which used to occasionally publish sustainability reports that addressed nutrition issues, now publishes them on an annual basis.
- All six companies encompass obesity and diet-related diseases in their reports, and five report on implementing strategies to address undernutrition and micronutrient deficiencies through product fortification (an improvement since the 2016 Index). The remaining companies do not yet publicly disclose their efforts to address India's nutrition challenges.

#### *Reporting on tackling obesity and diet-related diseases in India*

- In the 2016 Index, Hindustan Unilever was the only company of the ten assessed at that time, which reported comprehensively with respect to its work to prevent and address overweight and obesity and diet-related chronic diseases. Now, Nestlé India and PepsiCo India also provide more extensive explanations of their efforts to tackle these challenges in India, as Table 5 shows. However, no company publicly reports on its performance against all of their own objectives and targets for India. Britannia Industries, Coca-Cola India and Marico report to some degree, although their reporting is not as comprehensive as that of their peers.

#### *Reporting on tackling undernutrition and/or micronutrient deficiencies in India*

- Regarding undernutrition, the four companies that provided a limited commentary on their work to prevent and address undernutrition in India in 2016 – Britannia Industries, Coca-Cola India, Hindustan Unilever, Nestlé India – have all increased their level of disclosure. Their reporting is not limited simply to general statements on product fortification and consumers reached: most of them also provide an outlook on future plans for the Indian market, and challenges faced. Again, no company publicly reports on its current performance against all objectives and targets for India.
- Notably, PepsiCo India has also started to publish information on these issues specifically for the Indian market in a comprehensive manner which represents great improvement in the quality of its reporting. Britannia Industries is the only Indian-based company that publishes such annual reports.

### **Recommendations**

To improve their transparency about how they are improving consumers' access to nutrition, the 16 major food and beverage manufacturers in India assessed for this Index are encouraged to:

- Publicly and comprehensively report on their approach to tackling all forms of malnutrition issues in India on an annual basis, within the standard corporate reporting cycle.
- Report clearly on progress against commitments made and targets set.
- Set out a clear future plan for further improvement.

**Table 5. Companies' reporting on their efforts to tackle nutrition issues in India**

	Reporting (annually)	Reporting includes clear information about...				
		Strategy in relation to overall business strategy and nutrition context in India	Current performance against objectives/targets	Outlook on future plans/targets	Challenges faced	Impact of reached efforts
Aavin TCMPF* (new)						
Adani Wilmar* (new)						
Amul GCMMF*						
Britannia Industries	●	▲		◆ ▲		
Coca-Cola India	●	◆ ▲		◆ ▲	▲	
Emami Agrotech* (new)						
Hatsun Agro Product* (new)						
Hindustan Unilever	●			◆ ▲	◆ ▲	◆ ▲
ITC* (new)						
KMF Nandini (new)						
Marico* (new)	●	◆		◆		
Mondelez India						
Mother Dairy						
Nestlé India	●	◆ ▲		◆	◆ ▲	
Parle Products*						
PepsiCo India	●	◆ ▲		◆ ▲		◆ ▲

\* Did not provide information to ATNI

◆ Reporting refers to tackling obesity and diet-related diseases in India

▲ Reporting refers to tackling undernutrition and/or micronutrient deficiencies in India



# Amplifying Impact

Improving nutrition for all Indians



**End hunger, achieve  
food security and  
improved nutrition**



**Ensure healthy  
lives and promote  
well-being for all**

Driving the private sector's performance on healthy, affordable diets is a crucial factor to reach India's National Nutrition Mission and the goals of the Eat Right India movement. Reaching these goals for more than 1.25 billion citizens in India is also a prerequisite to reach the 2030 worldwide agenda of Sustainable Development including zero hunger and good health and well-being for all. This ATNI India Index finds food companies in India show their commitment to provide healthy food and discuss how to support the Poshan Abhiyaan mission and the Eat Right India movement. More innovative, healthy and affordable products can and should be introduced to make a real difference.

**The Access to Nutrition India Spotlight Index 2020 would not have been possible without the generous support of the Bill & Melinda Gates Foundation, the UK Department for International Development, the Netherlands Ministry of Foreign Affairs.**

The second India Spotlight Index was produced by the ATNI India Index project team which consists of Fiona Kirk, Osien Kumar, Paul Vos and Mark Wijne. For the company research, analysts Julia Lladós Vila, David Jerome and Estefania Marti Malvido complemented the team. ATNI executive director Inge Kauer, senior advisor Rachel Crossley and program intern Sofie van den Berg helped review texts and data.

As noted in the methodology section of the report, the ATNI team drew on the expertise and advice of two advisory groups, a group of expert reviewers in India and the ATNI international Expert Group. Their close engagement throughout the development process for the methodology of the India Spotlight Index 2020 has been a source of invaluable guidance, and this report benefited greatly from their input and advice (group composition and names in the full acknowledgment). The views expressed in this report, however, do not necessarily reflect the views of these two groups' members or of the institutions they represent.

BILL & MELINDA  
GATES *foundation*



Ministry of Foreign Affairs



# Acknowledgements

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## Research/ Implementing Partners

### The George Institute

Elizabeth Dunford and Fraser Taylor of The George Institute for Global Health (The George Institute), conducted the Product Profile assessment for the 16 companies in this 2020 Index and the analysis of changes in the nutritional profile of packaged food and beverage products from 11 large companies in India over a three year period for the Access to Nutrition Initiative.



### Innova Market Insights

Innova Market Insights (Innova), a commercial knowledge supplier for the Food and Beverage industry, provided product composition data.



### **73BIT**

Development 73BIT, a British IT developer, set up the online data platform used to collect and process company data. It also developed automatic scoring sheets and reports that fed into the scorecards.

### **Kummer & Herrman**

Kummer & Herrman based in the Netherlands, design for identity, website and reports.

### **Studio September**

Studio September based in the Netherlands, website development.

### **AvianWe**

AvianWE, an integrated communications agency in India, is ATNI's public relations partner for this index.

### **WRENmedia**

WREN*media*, a UK communication company did the language and copy editing of the report and scorecards.

## **Organizations Consulted**

- Alive & Thrive India, FHI 360
- Centre for Responsible Business, India
- Confederation of Indian Industries
- Food Fortification Initiative
- Food Safety and Standards Authority of India
- Global Alliance for Improved Nutrition, India
- National Institute of Nutrition, Hyderabad
- Netherlands Embassy, New Delhi

- Oxfam India
- Rabobank India
- Save the Children, India
- Tata Trusts
- The Bill & Melinda Gates Foundation India
- UNICEF India
- World Business Council for Sustainable Development
- World Health Organization India

## **ATNI India Expert Review Panel and Global Expert Group Members**

**The mandate of the India expert Review Panel and global Expert Group is to provide input into the development of the Corporate Profile methodology and other aspects of the Index. This group consists of members with expertise in various aspects of nutrition (including health dimensions of malnutrition, marketing, labeling, use of claims, nutrient profiling, regulatory issues, etc.)**

**The members of the India expert Review Panel and Expert Group serve in their personal capacities and in an advisory role. The views expressed in this report do not necessarily reflect their views or the views of the institutions they represent. Members are listed below.**

## India Expert Review Panel

### **Dr. Rajan Sankar**

*Director Nutrition, Tata Trusts*

### **Vivek Arora**

*Senior Advisor, Tata Trusts*

### **Rohini Saran**

*Deputy Lead – Food Fortification Resource Centre, Food Safety and Standards Authority of India (FSSAI)*

### **Dr. Avula Laxmaiah**

*Scientist 'G' & Head, Public Health, National Institute of Nutrition (NIN)*

### **Devyani Hari**

*Director – Programmes, Centre for Responsible Business (CRB)*

### **Rachna Sujay**

*Senior Technical Advisor – Diffusion States, Alive & Thrive*

### **Dr. Antaryami Dash**

*Advisor – Nutrition, Save the Children*

### **Shiva Mudgil**

*Vice President, RaboResearch Food & Agribusiness, Rabobank India*

## Global Expert Group

### **Shiriki Kumanyika**

*Chair, ATNI Expert Group;*  
*Professor Emerita of Epidemiology, Department of Biostatistics and Epidemiology, Perelman School of Medicine, University of Pennsylvania;*  
*Research Professor in Community Health & Prevention, Drexel University Dornsife School of Public Health*

### **Lindsay H. Allen**

*Director, USDA ARS Western Human Nutrition Research Center;*  
*Research Professor, Department of Nutrition, UC Davis*

### **Terry T-K Huang**

*Professor, School of Public Health, City University of New York*

### **Mike Rayner**

*Director, British Heart Foundation Health Promotion Research Group, University of Oxford*

### **Linda Meyers**

*Former Director (retired), Food and Nutrition Board, National Academies of Sciences, Engineering, and Medicine, Washington, DC*

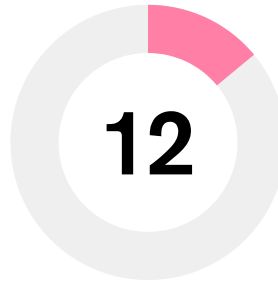
### **Boyd Swinburn**

*Professor, Population Nutrition and Global Health at the University of Auckland and Alfred Deakin; Professor and Director, World Health Organization (WHO) Collaborating Centre for Obesity Prevention at Deakin University in Melbourne*

# Aavin TCMPF

## Product Profile Categories

Dairy



Rank 12 / Score 1.4



## Product Profile

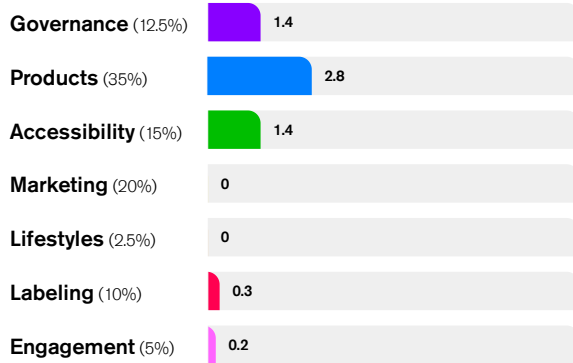
Rank 12 / Score 4.2

**Headquarters**  
India

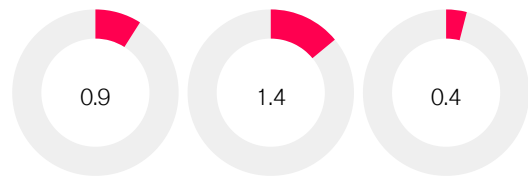
**Retail sales (INR – millions)**  
17  
69991

## Company Profile

**Rank 12**    **Score 1.4**



**Commitment**    **Performance**    **Disclosure**



The bar graph to the left shows company performance across the seven Index categories, which are key topic areas of assessment, and scores are shown for each category. The circles above provide an alternate view on the company's overall results, showing the score per indicator type.

(%) Figure in brackets is the weighting of the category. All category, commitment, performance and disclosure scores are out of 10



## Main areas of strength

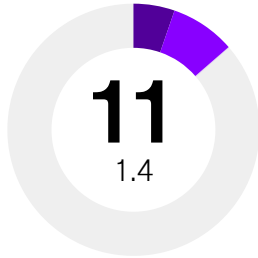
- Aavin TCMPF is assessed for the first time in the India Index 2020. ATNI welcomes Aavin TCMPF as one of the dairy cooperatives assessed in this Index, and the company's interest in the Index methodology and participation in stakeholder meetings.
- Aavin TCMPF voluntarily fortifies some of its relevant products, such as milk products, with vitamins A and D in accordance with the Food Safety and Standards Authority of India (FSSAI)'s Food Safety and Standards (Fortification of Foods) Regulation, 2018. The company could further improve its approach by publicly disclosing its strategy to deliver micronutrient fortification across its product portfolio.
- The company has introduced healthier variants of products in recent years, such as sugar-free alternatives of its flavored yogurts. Although Aavin TCMPF does not publicly disclose that it aims to support the National Nutrition Strategy and Vision 2022 (Kuposhan Mukh Bharat – free from malnutrition, across the life cycle) and other Government initiatives through its commercial activities, the introduction of sugar-free variants is in alignment with national priorities to address the challenges of rising overweight/obesity levels and non-communicable diseases. Further, its fortification effort supports the Government's efforts to combat undernutrition and micronutrient deficiencies.
- Aavin TCMPF provides nutrition information for many products on its website, where the details are well-organized into food group categories and easily accessible to consumers. The company could further improve its performance by ensuring that comprehensive nutrition information is available for all products both on product packaging and online.
- Aavin TCMPF makes a general commitment to making healthy products more affordable, which is disclosed on its website, and relates to its aim to deliver value-added products to consumers through quality milk at affordable prices.

## Priority areas for improvement

- Aavin TCMPF ranks joint twelfth overall in the Index, with a score of 1.4 out of 10.
- The company could improve its performance by adopting and disclosing a nutrition policy that specifies how the company contributes to improving nutrition and health through its commercial strategy and activities.
- The company ranks twelfth in the Product Profile with a score of 4.2 out of 10. Although a total of 18 dairy products were identified, sufficient nutrition information to assess was only available for two products, and of those, one was found to achieve a Health Star Rating (HSR) of 3.5 or more out of 5 – the 'healthy' threshold.
- Aavin TCMPF should define which of its products are healthy based on objective nutrition criteria using an internationally recognized Nutrient Profiling System. The company should also implement a strategy towards a healthier product portfolio by setting SMART – Specific, Measurable, Achievable, Relevant and Time-bound – product formulations and/or reformulation targets.
- Aavin TCMPF is advised to adopt and publish a responsible marketing policy for all consumer groups, with specific commitments for children and teenagers. Signing the Food and Beverage Alliance India Pledge could constitute a first step towards this aim. The company should also consider only marketing products to children that meet the World Health Organization (WHO) South-East Asia Region (SEAR) regional standard. The Product Profile found that 6% of company products currently meet this standard.
- To enable a better assessment of product healthiness, both by general consumers and by ATNI in the Product Profile, Aavin TCMPF should disclose more nutrition information on product packaging. The information should list all nutrients as recommended by the Codex Alimentarius and in compliance with local regulations, including for saturated fat, sodium and total sugars. Further, Aavin TCMPF is encouraged to implement an interpretive front-of-pack labeling system as soon as possible that aligns with other companies or industry associations, and is developed in partnership with the Government and other stakeholders.
- As a general recommendation, Aavin TCMPF could increase public disclosure about its nutrition-related commitments, policies and practices in India and is encouraged to engage with ATNI to allow for a more complete assessment.

# Category Analysis

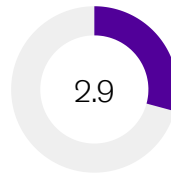
## Governance



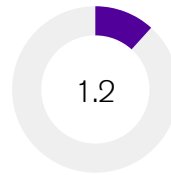
- A1** Nutrition strategy
- A2** Nutrition management
- A3** Reporting quality

All category, criteria, commitment, performance and disclosure scores are out of 10

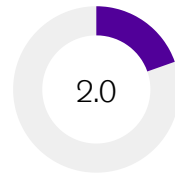
## Commitment



## Performance



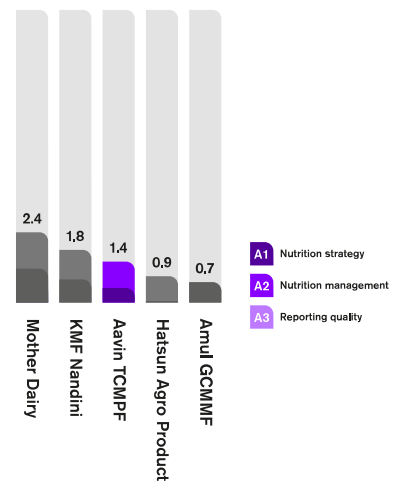
## Disclosure



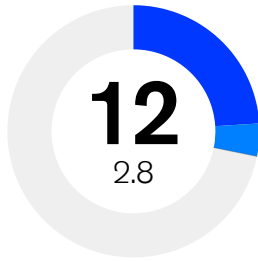
The circle on the left represents the company result for this Index category, showing the rank out of 16 and the score below it. The colored segments represent the respective criteria contributions to the overall category score. The above circles indicate how the company performs on the three types of indicators within this category.

Companies are grouped into three different industry segments in this Index based on the type of products they predominantly sell (i.e. contributing 80% or more to their total food and beverage sales) – dairy, edible oil or mixed portfolio. The graph on the right shows how the company's result within this Index category compares to that of its peers within the same industry segment.

## Peer Comparison



## Products



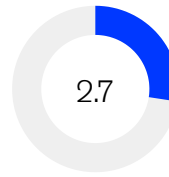
- B1** Product Profile
- B2** Product formulation
- B3** Defining healthy products

All category, criteria, commitment, performance and disclosure scores are out of 10

### Commitment



### Performance



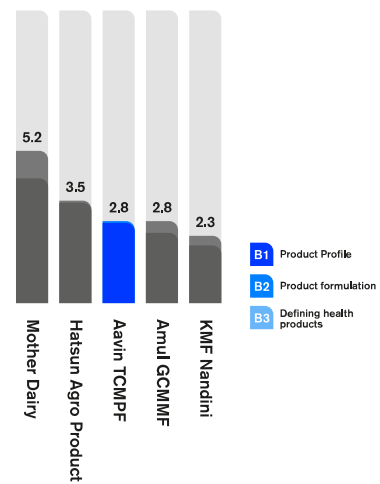
### Disclosure



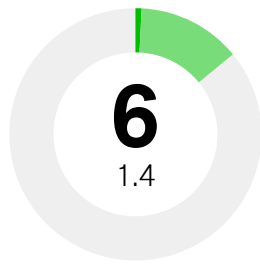
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## Peer Comparison

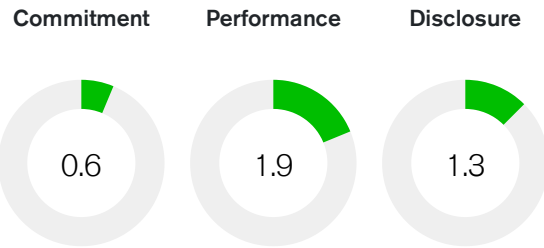


## Accessibility



- C1 Product pricing
- C2 Product distribution

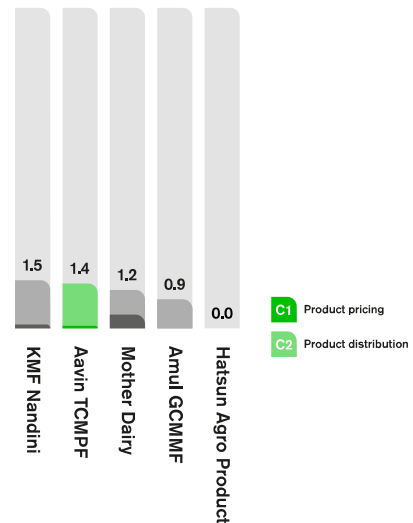
All category, criteria, commitment, performance and disclosure scores are out of 10



The circle on the left represents the company result for this Index category, showing the rank out of 16 and the score below it. The colored segments represent the respective criteria contributions to the overall category score. The above circles indicate how the company performs on the three types of indicators within this category.

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### Peer Comparison



# Marketing



- D1 Marketing policy
- D2 Marketing to children
- D3 Auditing and compliance

All category, criteria, commitment, performance and disclosure scores are out of 10

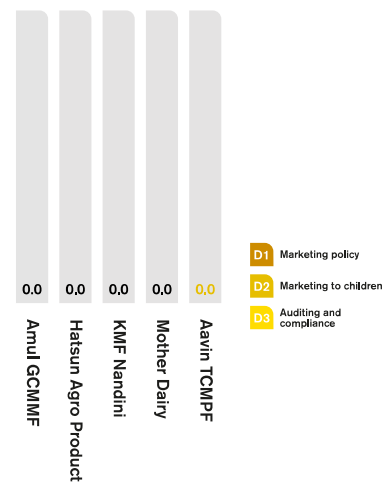
Commitment      Performance      Disclosure



The circle on the left represents the company result for this Index category, showing the rank out of 16 and the score below it. The colored segments represent the respective criteria contributions to the overall category score. The above circles indicate how the company performs on the three types of indicators within this category.

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## Peer Comparison

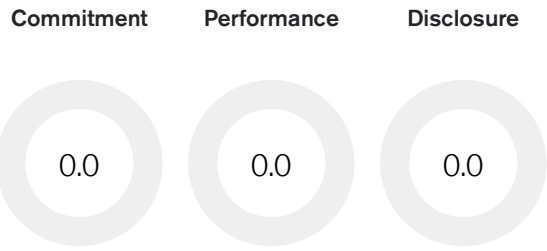


# Lifestyles



- E1 Employee health
- E2 Breastfeeding support
- E3 Consumer health

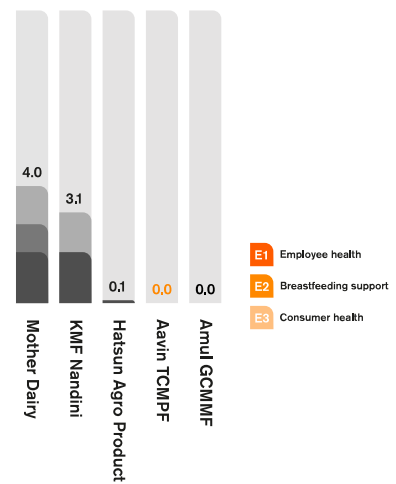
All category, criteria, commitment, performance and disclosure scores are out of 10



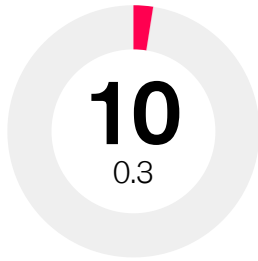
The circle on the left represents the company result for this Index category, showing the rank out of 16 and the score below it. The colored segments represent the respective criteria contributions to the overall category score. The above circles indicate how the company performs on the three types of indicators within this category.

Companies are grouped into three different industry segments in this Index based on the type of products they predominantly sell (i.e. contributing 80% or more to their total food and beverage sales) – dairy, edible oil or mixed portfolio. The graph on the right shows how the company's result within this Index category compares to that of its peers within the same industry segment.

## Peer Comparison

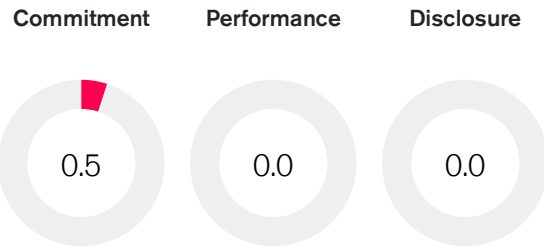


## Labeling



- F1 Product labeling
- F2 Claims

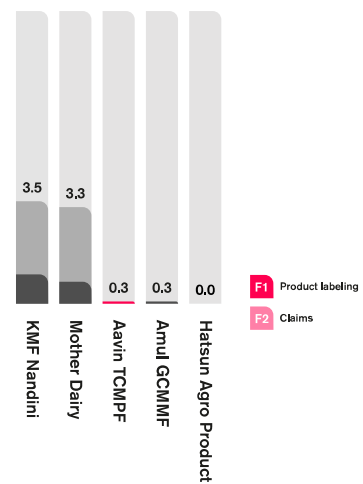
All category, criteria, commitment, performance and disclosure scores are out of 10



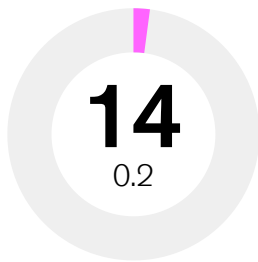
For this category performance indicators were not included. The circle on the left represents the company result for this Index category, showing the rank out of 16 and the score below it. The colored segments represent the respective criteria contributions to the overall category score. The above circles indicate how the company performs on the three types of indicators within this category.

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## Peer Comparison

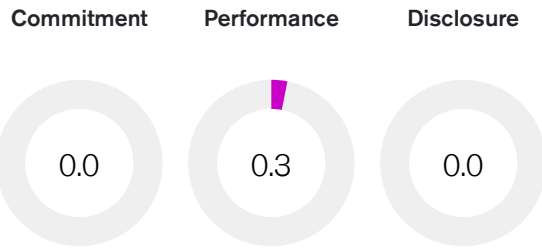


# Engagement



- G1** Influencing policymakers
- G2** Stakeholder engagement

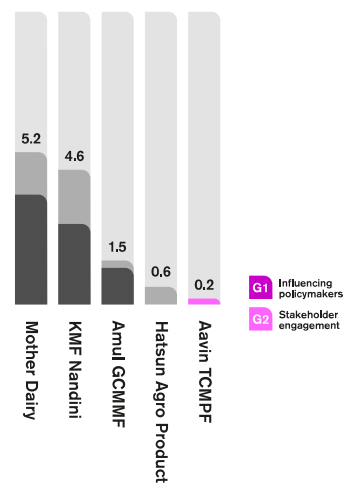
All category, criteria, commitment, performance and disclosure scores are out of 10



The circle on the left represents the company result for this Index category, showing the rank out of 16 and the score below it. The colored segments represent the respective criteria contributions to the overall category score. The above circles indicate how the company performs on the three types of indicators within this category.

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## Peer Comparison





# Product Profile



12

Rank 12 / Score 4.2

## Portfolio-level Results

Average HSR score products (sales-weighted)	Healthy products (HSR)			Products suitable to market to children (WHO SEAR)			Range of total India F&B sales included
	% products healthy	% sales healthy	No. products assessed	% products suitable	% sales suitable	No. products assessed	
2.3	50%	50%	2	6%	6%	17	90-100%

- A total of 18 products from the Dairy category were included in the Product Profile, representing 90-100% of Aavin TCMPF's estimated 2018 sales. Of those, only two products were eligible for inclusion in the Product Profile HSR assessment due to a lack of sufficient nutrient information for the remaining products. Therefore, it was not possible to get a clear picture of the mean healthiness of Aavin TCMPF's portfolio in comparison to the other companies.
- As one of the two products was found to meet the HSR healthy threshold, the company is estimated to have derived 50% of its 2018 sales from healthy products.
- The company achieves an unweighted mean HSR of 2.3 out of 5, which remains the same after sales-weighting, resulting in a mean healthiness score of 4.6 out of 10.
- A total of 17 dairy products were assessed to determine their suitability to be marketed to children according to the WHO SEAR nutrient profile model. One dairy product, estimated to represent 6% of the 2018 sales, was found to meet these criteria.

## Product Category Results

Category	Dairy
Mean HSR	2.3
% products healthy	50
% products suitable to market to children	6

- All of Aavin TCMPF's products selected for the Product Profile are in the Dairy category. The company's category-level results are therefore equivalent to its portfolio-level results.

## Relative nutritional quality of Aavin TCM PF's products by category compared to competitors

Mean HSR	Dairy
Aavin TCM PF	2.3
Amul GCMMF	2.4
Arla	3.2
BRF	2.7
Britannia Industries	2.2
Coca-Cola	3.6
Coca-Cola India	3.5
Conagra	2.1
Danone	3.5
Ferrero	0.7
FrieslandCampina	3.4
General Mills	3.5
Hatsun Agro Product	2.7
KMF Nandini	2.2
Kraft Heinz	2.7
Lactalis	3.1
Mars	2.8
Meiji	3.2
Mengniu	3
Mondeléz	2.4
Mother Dairy	3.0
Nestlé	2.4
Nestlé India	3.0
PepsiCo	3.1
Suntory	3
Tingyi	2.7
Yili	3.1

- With a mean HSR of 2.3 out of 5 for its dairy products, Aavin TCM PF ranks sixth out of eight companies within the Dairy product category.
- Aavin TCM PF achieves a relative category score of 3.8 out of 10 based on its ranking within this category.

## Conclusion

- Aavin TCM PF's mean healthiness score of 4.6 and relative category score of 3.8 result in an overall Product Profile score of 4.2 out of 10, which means the company ranks twelfth in this assessment.
- In addition to disclosing more nutrition information for all its products (with specific attention to the saturated fat, sodium and total sugars content), Aavin TCM PF should consider taking action to improve the nutritional quality of its dairy products, and adopting relevant and measurable targets and goals. Further, the company is encouraged to shift sales towards its healthier products within the Dairy category.

## Footnotes

1. Healthy products are defined as products that meet Health Star Rating of 3.5 or higher.
2. In the context of this finding, the definition of healthy products is based on the company's own criteria for determining which products are healthy. ATNI does not credit portion-limited unhealthy products in this regard (e.g. in the Confectionery or Ice Cream and Frozen Desserts categories).
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4. McGovern, M. E. et al. (2017) 'A review of the evidence linking child stunting to economic outcomes', *International Journal of Epidemiology*, pp 1171-1191.
5. FSSAI (2017) Transforming the Food Safety and Nutrition landscape in India 2016-17. Available at: <https://fssai.gov.in/book-details.php?bkid=195> (Accessed: 25 October 2019).
6. Tay, C. (19 December 2018) Mandatory rice fortification for public programmes in India by December 2019. Available at: <https://www.foodnavigator-asia.com/Article/2018/12/19/Mandatory-rice-fortification-for-public-programmes-in-India-by-December-2019> (Accessed: 25 October 2019)
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8. MoFPI, CII and EY - (2017) High-Growth Segments of Indian Food and Beverage Industry, pp. 1–88.
9. MoFPI, CII and EY - (2017) High-Growth Segments of Indian Food and Beverage Industry, pp. 1–88.
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11. Deloitte and FICCI (2018) Industry 4.0 in Food Industry India Food Report. Available at: [https://invest-india-revamp-static-files.s3.ap-south-1.amazonaws.com/s3fs-public/Deloitte%20publication%20on%20Industry%204.0%20in%20Food%20Industry\\_0.pdf](https://invest-india-revamp-static-files.s3.ap-south-1.amazonaws.com/s3fs-public/Deloitte%20publication%20on%20Industry%204.0%20in%20Food%20Industry_0.pdf)
12. MoFPI, CII and EY - (2017) High-Growth Segments of Indian Food and Beverage Industry, pp. 1–88.
13. POSHAN Abhiyaan is India's flagship program to improve nutritional outcomes for children, adolescents, pregnant women and lactating mothers by leveraging technology, a targeted approach and convergence. For more information, see: <http://icds-wcd.nic.in/nnm/home.htm>
14. The ISO 22000:2005 standard was replaced by ISO 22000:2018 in June 2018. During the assessment phase of the India Spotlight Index 2020, existing certificates to ISO 22000:2005 were still valid – these certificates expire after the release and publication of ISO 22000:2018 (19th June 2018), with the transition deadline being no later than 29 June 2021. See: <https://www.iso.org/news/ref2301.html>.
15. ISO 22000:2018 Food safety management systems – Requirements for any organization in the food chain is the new revised version of the ISO 22000:2005 standard. This standard sets out the requirements for a food safety management system. It defines what an organization must do to demonstrate its ability to control food safety hazards and ensure that food is safe for consumption.
16. Because the company derives more than 80% of its sales from dairy products, it is assessed as part of the dairy industry segment.
17. Source: Derived from Euromonitor International's 2018 industry publications of: Packaged Food, Hot Drinks and Soft Drinks.

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## India Spotlight

### Index 2020

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