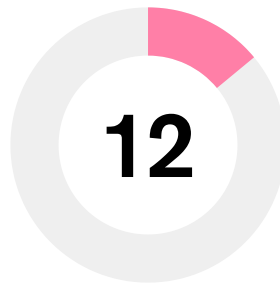


Aavin TCMPF ¹

Product Profile Categories
Dairy



Rank 12 / Score 1.4



Product Profile

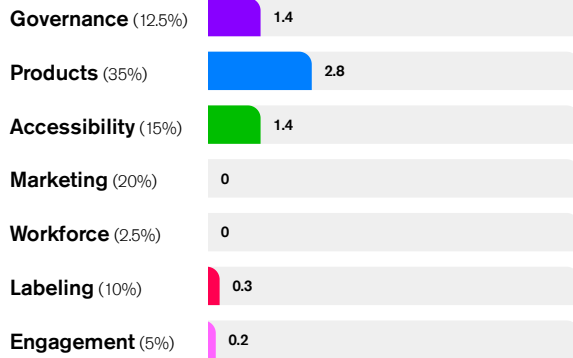
Rank 12 / Score 4.2

Headquarters
India

Retail sales (INR – millions)
²
69991

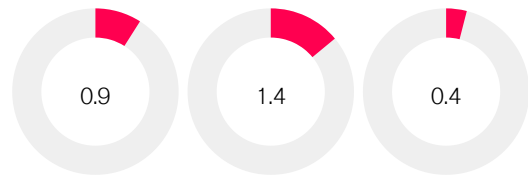
Company Profile

Rank 12 Score 1.4



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

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.

Main areas of strength

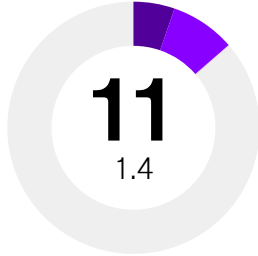
- Aavin TCMPF is assessed for the first time in the India Index 2020. ATNI welcomes Aavin TCMPF as one of the dairy cooperatives assessed in this Index, and the company's interest in the Index methodology and participation in stakeholder meetings.
- Aavin TCMPF voluntarily fortifies some of its relevant 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 Mukta 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

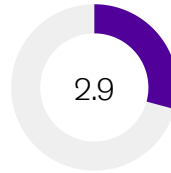
Governance



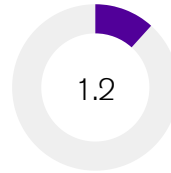
- A1** Nutrition strategy
- A2** Nutrition management
- A3** Reporting quality

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

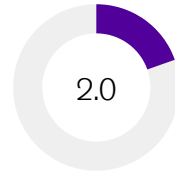
Commitment



Performance



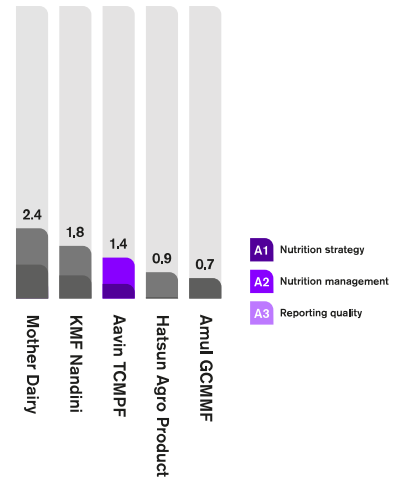
Disclosure



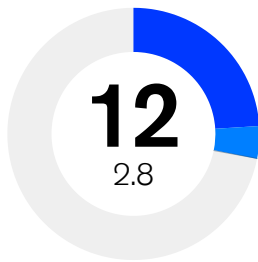
The circle on the left represents the company result for this Index category, showing the rank out of 16 and the score below it. The colored segments represent the respective criteria contributions to the overall category score. The above circles indicate how the company performs on the three types of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

Peer Comparison

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.



Products



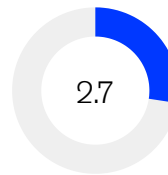
- B1** Product Profile
- B2** Product formulation
- B3** Defining healthy products

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

Commitment



Performance



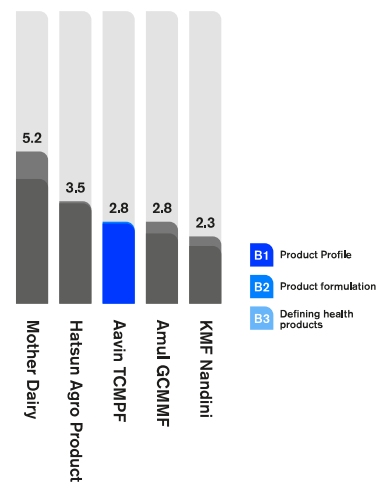
Disclosure



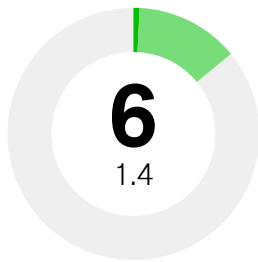
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Peer Comparison



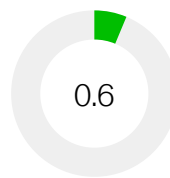
Accessibility



- C1 Product pricing
- C2 Product distribution

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

Commitment



Performance



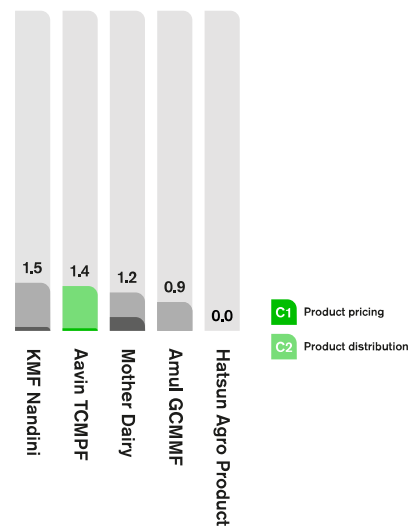
Disclosure



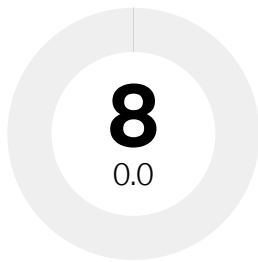
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Peer Comparison

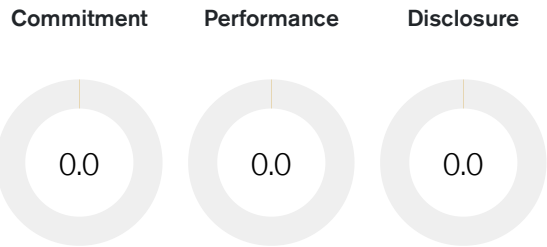


Marketing



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

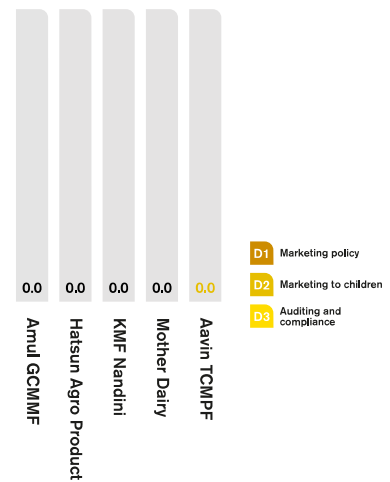
All category, criteria, commitment, performance and disclosure scores are out of 10



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Peer Comparison

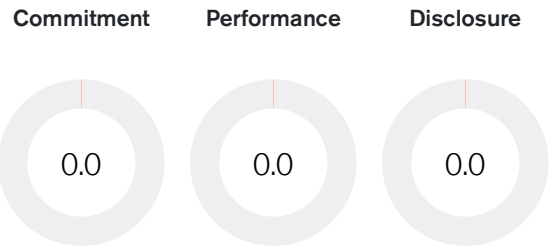


Workforce



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

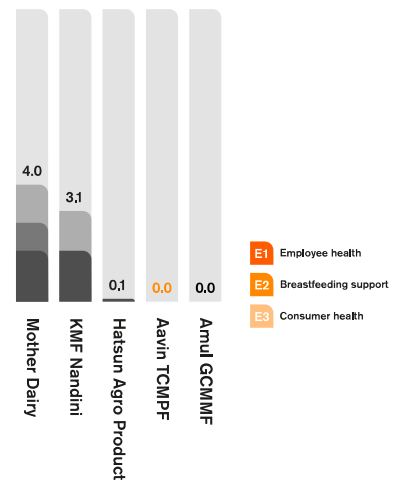
All category, criteria, commitment, performance and disclosure scores are out of 10



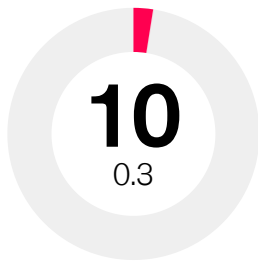
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Peer Comparison



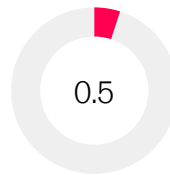
Labeling



- F1 Product labeling
- F2 Claims

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

Commitment



Performance



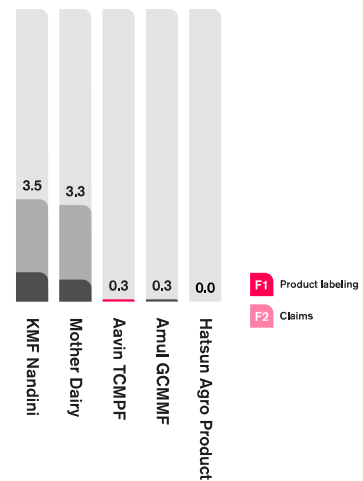
Disclosure



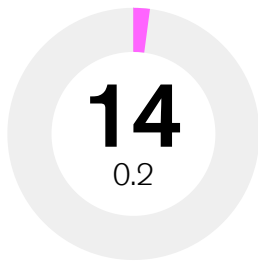
For this category performance indicators were not included. The circle on the left represents the company result for this Index category, showing the rank out of 16 and the score below it. The colored segments represent the respective criteria contributions to the overall category score. The above circles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

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Peer Comparison

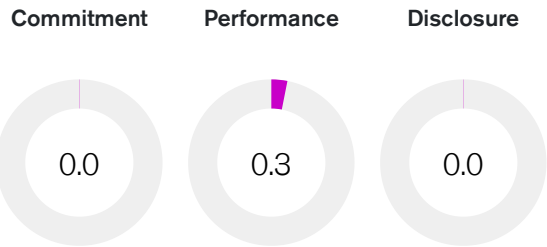


Engagement



- G1 Influencing policymakers
- G2 Stakeholder engagement

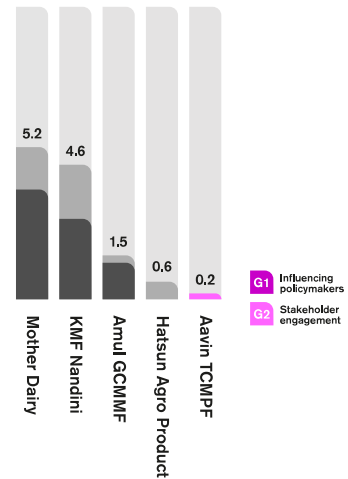
All category, criteria, commitment, performance and disclosure scores are out of 10



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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
Mondelēz	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 TCMPPF 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.

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India Spotlight

Index 2020

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Footnotes

1. Because the company derives more than 80% of its sales from dairy products, it is assessed as part of the dairy industry segment.
2. Source: Derived from Euromonitor International's 2018 industry publications of: Packaged Food, Hot Drinks and Soft Drinks.