



CORPORATE PROFILE



PRODUCT PROFILE

**Company Description**

Amul is a dairy cooperative. Its main product categories are wide range of dairy products, ice cream, confectionery and oils and fats.

**Headquarters** Anand, Gujarat, India

**Employees** Not available

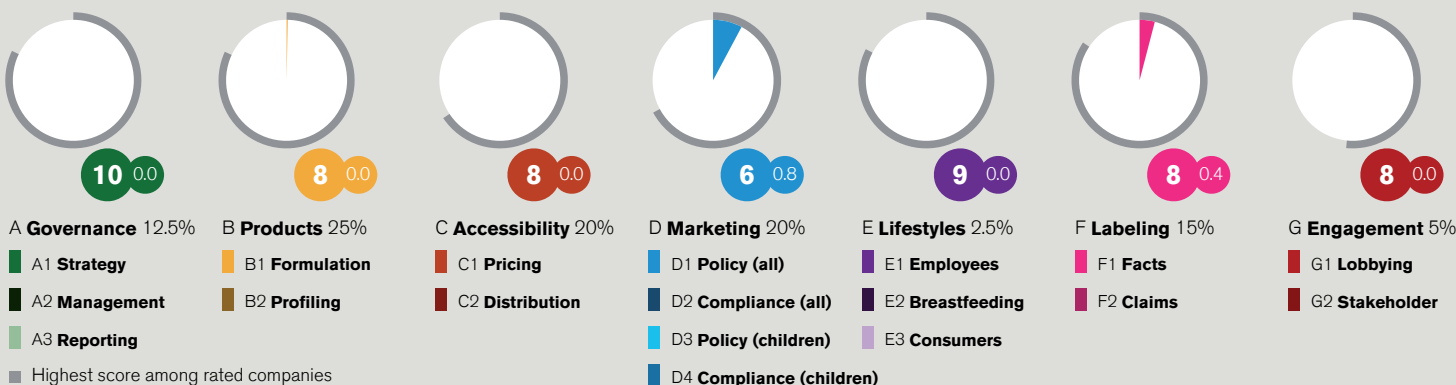
**Total revenues\*** 181,615.5 mn INR

\* Source: Euromonitor

**Product Profile\*\***

	Revenues	Mean HSR rating
Drinking milk products	44%	2.84
Oils and fats	26%	0.70
Yogurt and sour milk products	10%	0.35
Ice cream	9%	1.78
Cheese	5%	2.94
Other dairy	4%	1.88
Confectionery	1%	1.00

**Corporate Profile**



**Areas of strength**

- Amul states on its website that “health beverages” are among the products that it offers; however, no further detail was provided on what percentage of products the health beverages account for.
- Amul ranks third on the Product Profile, with a sales-weighted score of 4.4 out of 10. This is principally because nearly 45% of its products are drinking milks, some of which achieve a relatively good Health Star Rating.
- Also, Amul performs in line with the industry average in terms of providing nutrition information about its products online. It is encouraged to increase such disclosure on its website.

**Areas for improvement**

- In general, Amul’s limited disclosure means that no clear strengths were identified in the Corporate Profile research. Better disclosure by Amul about its approach to tackling the double burden of malnutrition in India, in terms of nutrition governance, product formulation, affordability and accessibility, responsible marketing practices, lifestyles, labeling and nutrition engagement, would allow for a more complete assessment and identification of specific areas for improvement. Similarly, engagement with ATNF would facilitate a fuller assessment of the company’s policies and practices. Amul is encouraged to engage with ATNF during the research phase for the next India Index.
- Although the company ranks third on the Product Profile, its relatively low score of 4.4 out of 10 shows that it has significant scope to reformulate its products to improve their nutritional profile, and/or to develop new, healthier products.
- Amul could improve its back-of-pack nutritional labeling to bring it fully into line with Codex recommendations. The George Institute found that only 13% of the company’s labels currently comply with such recommendations.
- Amul’s infant formula product, Amulspray, was included in the assessment of marketing of breast-milk substitutes carried out for ATNF by health research company Westat in Mumbai during the summer of 2016. While no adverts or point-of-sale promotions were identified for this product, nor any informational or educational materials, the label for Amulspray does not fully comply with labeling requirements for BMS products set out in the IMS Act 2003.

**i** Amul was evaluated in the BMS assessment as it produces and markets BMS in India. The Corporate Profile score has been adjusted by -0.25 to reflect its performance in the BMS assessment. Amul publishes little information pertaining to its nutrition practices and did not provide any information upon request during the research process. As a result, it has been difficult to assess the company for the 2016 India Index.

**\*\*** The mean HSR is calculated per category and multiplied by the percentage of 2015 sales per category. These figures are totalled and doubled to give a maximum Product Profile score of 10.



# Britannia Industries



CORPORATE PROFILE



PRODUCT PROFILE

## Company Description

Britannia Industries Limited is a publicly listed food company that makes predominantly sweet and savory biscuits, a wide range of dairy products, and some oils and fats.

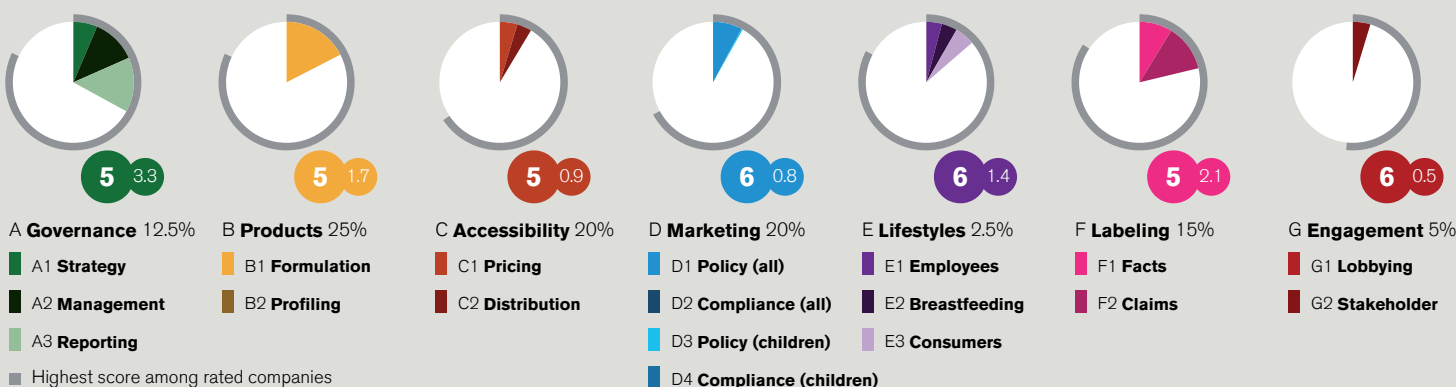
**Headquarters** Bengaluru, India  
**Employees** 1,654  
**Total revenues\*** 99,962.1 mn INR

\* Source: Euromonitor

## Product Profile\*\*

	Revenues	Mean HSR rating
Sweet biscuits	68%	1.55
Savory biscuits	11%	2.19
Bread	7%	3.79
Butter and Margarine	4%	0.50
Cakes	4%	1.42
Cheese	3%	2.29
Yoghurt and sour milk products	2%	2.83
Drinking milk products	1%	2.67

## Corporate Profile



NUTRITION GENERAL 6 1.3

UNDERNUTRITION 2 4.1

## Areas of strength

- Britannia Industries scores the highest on the Corporate Profile among the Indian-based companies assessed due to its relatively good disclosure on nutrition issues. It is one of two Indian companies that committed to engaging with the Access to Nutrition Foundation (ATNF) and provided confidential information to ATNF during the preparation of this Index.
- Britannia Industries scores highest on Category A, Nutrition Governance and Management. Its corporate identity "Eat Healthy, Think Better" is supported by its focus on "healthy, fresh and delicious food" in its product portfolio. Moreover, the company obtained ISO 22000 certification for its food safety management system across all its manufacturing facilities in India. Both its relatively strong performance on Category A and its active engagement are indicative of the company's willingness to invest in and further develop its activities to address India's double burden of malnutrition.
- Britannia Industries demonstrates a strong and comprehensive approach to addressing undernutrition in India. The Britannia Nutritional Foundation (BNF) aims to address undernutrition among underprivileged children. It does this by pursuing research and product innovation for Britannia Industries, distributing fortified products to targeted populations, like children, and engaging in community education activities with respect to undernutrition and malnutrition. Through activities of the BNF, Britannia Industries also has a commitment to funding/supporting external organizations that educate undernourished consumers in areas such as fortified food, breastfeeding and micronutrient supplementation.

## Areas for improvement

- Despite its relative high rank, Britannia Industries has a below average overall Corporate Profile score (1.6) on the ATN Index 2016 and could improve its performance in several areas.
- Like many of its Indian industry peers, Britannia Industries does not have a Nutrient Profiling System (NPS) and should adopt one to guide its improvement of the nutritional value of its products and development of new healthy products. Britannia Industries discloses that a NPS is under development.
- Britannia Industries ranked fourth on the Product Profile with a score of 3.6 out of 10, and was estimated to derive only around 9% of its 2015 total sales from healthy products, i.e. achieving a rating of 3.5 stars or more on the Health Star Rating system.
- While Britannia Industries discloses a few examples of having improved the affordability of its fortified products, such as the Tiger range of biscuits, it does not have a formal commitment to improving the accessibility or affordability of its healthy products.
- Britannia Industries has a responsible marketing policy that applies only to TV and radio. The company should broaden the scope of its policy to cover all media embracing the principles of the ICC Framework for Responsible Food and Beverage Marketing Communications.
- Britannia Industries does not disclose a formal policy on marketing to children which is an important omission. The company has stated that such a policy is currently under development. Britannia Industries should consider becoming a signatory of the Food and Beverage Alliance of India (FBAI) Pledge.
- There is no evidence that Britannia Industries has a commitment to provide nutritional information on both back- and front-of-pack labels. The company is encouraged to make such a commitment and be more transparent about its labeling commitments.

\*\* The mean HSR is calculated per category and multiplied by the percentage of 2015 sales per category. These figures are totalled and doubled to give a maximum Product Profile score of 10.



# Coca-Cola India



CORPORATE PROFILE



PRODUCT PROFILE

## Company Description

Coca-Cola India is a private limited company. The company offers products in various beverage categories including lemonades, regular cola carbonates, juice drinks and bottled water.

**Headquarters** United States; Gurgaon, India

**Employees** 25,000

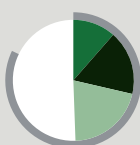
**Total revenues\*** 99,738.9 mn INR

\* Source: Euromonitor

## Product Profile\*\*

	Revenues	Mean HSR rating
Lemonade/Limeade	30%	1.25
Regular cola carbonates	26%	1.00
Juice drinks (up to 24% juice)	26%	0.79
Still bottled water	11%	5.00
Orange carbonates	5%	1.00
Mixers	1%	3.60
Low calorie cola carbonates	1%	2.00

## Corporate Profile



- A1 Strategy
- A2 Management
- A3 Reporting



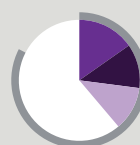
- B1 Formulation
- B2 Profiling



- C1 Pricing
- C2 Distribution



- D1 Policy (all)
- D2 Compliance (all)
- D3 Policy (children)
- D4 Compliance (children)



- E1 Employees
- E2 Breastfeeding
- E3 Consumers

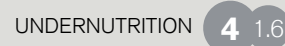
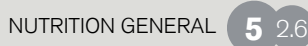


- F1 Facts
- F2 Claims



- G1 Lobbying
- G2 Stakeholder

■ Highest score among rated companies



## Areas of strength

- Coca-Cola India demonstrates good governance practices in managing its nutrition strategy in India. It is aligned with The Coca-Cola Company's strategic commitments to address obesity on a global scale: offering more low- or no-calories beverages, providing nutrition-related information on packaging, supporting physical activity programs and marketing products responsibly.
- Regarding marketing to children, the company fully adopts its parent company's policy that is applied across many media types and explicitly commits to not advertise any products to children under 12. This policy is supplemented by its Global School Beverage Guidelines which also apply in India, with some modifications to address local regulatory compliance. The company is also a signatory to the FBAI India Pledge.
- Compared to its parent company in the 2016 Global Index, Coca-Cola India provides more information on policies and programs that promote the wellbeing of various stakeholders. Coca-Cola India discloses Maternity Leave and Flexible Work Hours policies for several business units in India, as well as a commitment to fund programs through Coca-Cola India Foundation aimed at, among other initiatives, promoting active lifestyles.
- Coca-Cola India has commitments to front- and back-of-pack labeling, including: saturated fat separate to total fat and sodium; nutrition information on a per serving or per portion basis, and; numeric information on levels of key nutrients. The company also offers nutrition information online for all products, outstanding performance compared to peers assessed for this Index.
- In terms of stakeholder engagement to solicit feedback on the company's nutrition strategy, Coca-Cola India's disclosure is strong: it provides a narrative on who it engaged with, what kind of feedback it received and how its plans to address feedback.

## Areas for improvement

- Although Coca-Cola India demonstrates some commendable policies and practices, it has various opportunities to improve its performance to promote health and nutrition among the wider population and to address undernutrition.
- As noted in the 2016 Global Index, Coca-Cola India does not have a Nutrient Profiling System. Were it to adopt one, it would be able to evidence its shift towards offering healthier products more definitively. For example, the Product Profile study found that 19% of Coca Cola India's 26 beverages assessed achieved a Health Star Rating of 3.5 or more – the threshold for a healthy product - the highest percentage of the three cold beverage makers assessed.
- Coca-Cola India ranked sixth out of nine companies on the Product Profile with a sales-weighted score of 3 out of 10 which shows that it has significant scope to further improve its products' nutritional profile and to develop new, healthier products. Importantly it should direct more of its marketing spending towards lower and zero-calorie products to drive their sales compared to higher calorie options.
- The company is encouraged to augment its reporting on influencing governments and policymakers by disclosing its membership in industry associations that lobby on nutrition issues, and whether it provides financial support to these organizations, and/or has a role on their boards. Or, if the company is not involved in such activities, to clearly state that is the case.
- While the company has released several fortified products in the past, as of 2016 it does not offer any fortified products. It does not disclose a policy pledging to play a role in combating undernutrition in India nor has it done an assessment of specific micronutrient needs among key undernourished groups in India. Coca-Cola India is encouraged to do more in this area.

**i** Coca-Cola India is the only company assessed for this Index that only sells beverages. Given the company's product portfolio, the analysis in Category B does not assess whether the company has reduced salt, transfat or saturated fat in its products as its products do not contain these ingredients. It was solely assessed on its commitments and performance relating to calories and the performance indicators relating to introduction or existence of healthy products.

**\*\*** The mean HSR is calculated per category and multiplied by the percentage of 2015 sales per category. These figures are totalled and doubled to give a maximum Product Profile score of 10.



# Hindustan Unilever



CORPORATE PROFILE



PRODUCT PROFILE

## Company Description

Hindustan Unilever is a publicly listed company in India, offering a range of F&B products. Its biggest selling product category in India is tea. Other major categories are ice creams, table sauces, soups and jams and preserves.

**Headquarters** United Kingdom, The Netherlands; Mumbai, India

**Employees** 18,000

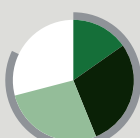
**Total revenues\*** 75,503.56 mn INR

\* Source: Euromonitor

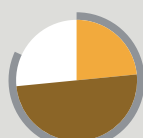
## Product Profile\*\*

	Revenues	Mean HSR rating
Ice cream	45%	2.47
Table sauces	18%	2.13
Soup	12%	3.82
Jams and preserves	10%	1.71
Liquid concentrates	8%	0.50
Still RTD tea	4%	1.00
Cooking sauces	1%	3.50
Instant Noodles	0.5%	2.90

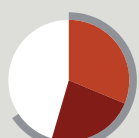
## Corporate Profile



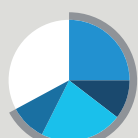
- A1 Strategy
- A2 Management
- A3 Reporting



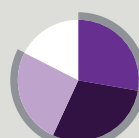
- B1 Formulation
- B2 Profiling



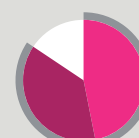
- C1 Pricing
- C2 Distribution



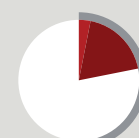
- D1 Policy (all)
- D2 Compliance (all)
- D3 Policy (children)
- D4 Compliance (children)



- E1 Employees
- E2 Breastfeeding
- E3 Consumers



- F1 Facts
- F2 Claims



- G1 Lobbying
- G2 Stakeholder

■ Highest score among rated companies

## NUTRITION GENERAL Rank 2, Score 7.1

## UNDERNUTRITION Rank 3, Score 2.7

## Areas of strength

- Hindustan Unilever (HUL) ranks second on both the Corporate Profile and the Product Profile.
- HUL adheres to its parent company's comprehensive and well-structured Unilever Sustainable Living Plan (USLP) which sets out two nutrition-related commitments: Improving Nutrition and Health & Hygiene. The former focuses on the goal of "doubling the proportion of the foods portfolio that meets the highest nutritional standards by 2020"; the latter commitment focusses on Water, Sanitation & Hygiene (WASH).
- HUL also demonstrates leading practice by assigning top executive and Board-level accountability for its nutrition strategy. Further, the progress on its 'Improving Nutrition' commitment is reviewed by its Board-level Corporate Social Responsibility Committee and audited independently at a global level.
- HUL uses the NPS of its parent company, which is among the best assessed for this Index, as it is based on WHO dietary guidelines and has been developed by experts, addresses all product categories and sets thresholds for nutrients, and is published in peer reviewed scientific magazines. It also commits to the same product reformulation targets as its parent company.
- Like its parent company, HUL is an industry leader in terms of its overall approach to responsible marketing practices. The company wholly adopts the policies and monitoring systems of its parent company. Of note, the company has signed the FBAI India Pledge for responsible marketing to children.
- HUL is one of the best performing companies on Category F; it publicly reports its approach to back- and front-of-pack product labeling. On front-of-pack labels, HUL commits to indicate energy value per portion and percentage of the Guideline Daily Amounts (GDA). The company also demonstrated a relatively high degree of compliance with the Codex labeling guidelines, with 79% of its products assessed by The George Institute also listing sodium and saturated fat content.

## Areas for improvement

- It was estimated that Hindustan Unilever derives only 12% of its 2015 total sales from healthy products, i.e. achieve a rating of 3.5 stars or more on the Health Star Rating system, the threshold for a healthy product. The Product Profile study illustrates that HUL could improve the nutritional quality of many of its products.
- HUL could improve its disclosure in several areas relating to its healthy product launches, the share of its portfolio suitable for consumption by children, its work to increase the affordability of its healthy products, its level of compliance with its responsible marketing policy for children and its engagement with stakeholders to inform its commercial nutrition and undernutrition strategies.
- HUL should consider committing to support consumer education programs on healthy diets and active lifestyles tailored to the India context, ideally developed and implemented by independent expert organisations.
- HUL could improve its low score in Category G by articulating a policy on engaging with public policymakers on nutrition-related issues.
- With respect to doing more to tackle undernutrition through product fortification, HUL should consider developing and reporting more extensively on both its commercial and philanthropic strategies in this area. HUL's undernutrition sustainability strategy in India is centered on increasing access to water and improving hygiene, which can improve health but is not an undernutrition-focussed strategy per se. Comprehensive product fortification programs are also yet to be rolled out in India.

\*\* The mean HSR is calculated per category and multiplied by the percentage of 2015 sales per category. These figures are totalled and doubled to give a maximum Product Profile score of 10.



# Mondelez India



CORPORATE PROFILE



PRODUCT PROFILE

## Company Description

Mondelez India is a private limited company producing predominantly confectionary, sweet biscuits and powdered hot and cold beverages. The company was formerly known as Cadbury India Ltd.

**Headquarters** United States; Mumbai, India

**Employees** >1,000

**Total revenues\*** 69,833.26 mn INR

\* Source: Euromonitor

## Product Profile\*\*

	Revenues	Mean HSR rating
Confectionary	84%	0.53
Flavoured powder drinks	12%	0.50
Sweet biscuits	4%	1.07
Powder concentrates	1%	0.50

## Corporate Profile



- A Governance 12.5%
- A1 Strategy
- A2 Management
- A3 Reporting



- B Products 25%
- B1 Formulation
- B2 Profiling

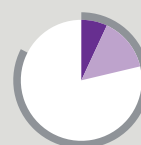


- C Accessibility 20%
- C1 Pricing
- C2 Distribution

## NUTRITION GENERAL 4 (3.4)

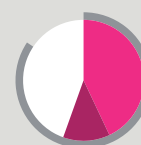


- D Marketing 20%
- D1 Policy (all)
- D2 Compliance (all)
- D3 Policy (children)
- D4 Compliance (children)



- E Lifestyles 2.5%
- E1 Employees
- E2 Breastfeeding
- E3 Consumers

## UNDERNUTRITION 7 (0.9)



- F Labeling 15%
- F1 Facts
- F2 Claims



- G Engagement 5%
- G1 Lobbying
- G2 Stakeholder

■ Highest score among rated companies

## Areas of strength

- Mondelez India scores above average on the Corporate Profile. The company has a strong commitment with respect to recognizing its role in tackling India's challenges of obesity and diet-related chronic diseases as its parent company Mondelez International, Inc. was found to do in the 2016 Global Index. The company's nutrition strategy was established at a group level, with global scope, and so applies to its Indian operations.
- Mondelez India applies the Nutrient Profiling System (NPS) developed by its global parent, one of the few companies among its industry peers to have such a system.
- Mondelez India has strong responsible marketing policies for the general population and for children, adherence to which is monitored. It is noteworthy that Mondelez International discloses the results of the independent audits that assess whether it applies its responsible marketing policy relating to children properly and consistently, including in India. It discloses its individual compliance level for both TV and internet-based media in India.
- As of January 1, 2016, Mondelez International, Inc. ceased advertising to children under 12. This commitment applies globally. Mondelez India is one of only two companies assessed that does not advertise any products to children aged under 12.
- The company is the highest scoring with respect to compliance of the back-of-pack nutritional labeling with Codex recommendations. The George Institute found that 85% of the company's labels currently comply with such recommendations.
- Mondelez India, like Mondelez International, Inc., is one of few companies in the 2016 India Index that conducts its stakeholder engagement in line with AA1000 standards. This strong commitment is an industry leading practice.

## Areas for improvement

- Mondelez India ranked ninth out of nine companies in the Product Profile study with an overall score of 1.1 out of 10. All of its 2015 sales were generated by products that score less than 3.5 stars on the Health Star Rating (HSR) system, the level used to designate a healthy product.
- While Mondelez International, Inc. specifies that approximately 25% of its global product portfolio meets its composite healthy standard, Mondelez India does not provide a similar figure for the percentage of its Indian product portfolio that meets this standard – though, as noted, The George Institute study, on which the Product Profile score is based, found that none of its 46 products assessed meet the healthy standard of the HSR system.
- Unlike its global parent's commitment, noted in the 2016 Global Index, to invest in research and development to improve the nutritional quality of its products, Mondelez India does not disclose any India-specific commitment to do the same.
- Mondelez India demonstrates nutrition reduction targets with deadlines for salt/sodium, trans fat and saturated fats. To further enhance its contribution to improving diets in India, Mondelez India is encouraged to set targets for added sugars with deadlines for achieving them.
- Despite some strong policies and practices, Mondelez India has gaps in disclosure. Unlike the parent company's disclosure of formal, regular Well-Being Progress reports that detail its approach to nutrition issues, Mondelez India does not publish such reports. Information about the company's Corporate Social Responsibility programs published on its website on a yearly basis is not specific to the company's approach to nutrition issues in India.

\*\* The mean HSR is calculated per category and multiplied by the percentage of 2015 sales per category. These figures are totalled and doubled to give a maximum Product Profile score of 10.



# Mother Dairy



CORPORATE PROFILE



PRODUCT PROFILE

## Company Description

Mother Dairy operates as a subsidiary of the National Dairy Development Board. Mother Dairy markets and sells milk and other dairy products under the Mother Dairy brand. It also sells canned/preserved food, edible oils, frozen vegetables, pulses, fruit juices and jams.

**Headquarters** Noida, India  
**Employees** 2,916  
**Total revenues\*** 108,038.7 mn INR  
 \* Source: Euromonitor

## Product Profile\*\*

	Revenues	Mean HSR rating
Drinking milk products	77%	2.74
Yogurt and sour milk products	13%	3.50
Ice cream	7%	2.11
Processed frozen fruit and vegetables	2%	5.00
Butter and margarine	2%	2.00

## Corporate Profile



**A Governance** 12.5%  
 A1 Strategy  
 A2 Management  
 A3 Reporting



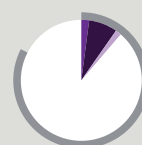
**B Products** 25%  
 B1 Formulation  
 B2 Profiling



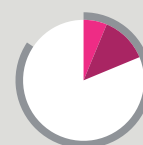
**C Accessibility** 20%  
 C1 Pricing  
 C2 Distribution



**D Marketing** 20%  
 D1 Policy (all)  
 D2 Compliance (all)  
 D3 Policy (children)  
 D4 Compliance (children)



**E Lifestyles** 2.5%  
 E1 Employees  
 E2 Breastfeeding  
 E3 Consumers



**F Labeling** 15%  
 F1 Facts  
 F2 Claims



**G Engagement** 5%  
 G1 Lobbying  
 G2 Stakeholder

■ Highest score among rated companies

## NUTRITION GENERAL 6 1.3

## UNDERNUTRITION 6 1.1

## Areas of strength

- Mother Dairy is one of two Indian companies that committed to engaging with the Access to Nutrition Foundation (ATNF).
- The company states that nutrition is part of its strategic focus and reports having a Board-level Corporate Social Responsibility (CSR) committee charged with designing and implementing nutrition-related commercial and non-commercial strategies. During the engagement process, Mother Dairy indicated that its nutrition strategy is under development, signalling increased attention to nutrition at the highest level of the company.
- Mother Dairy ranked first in the Product Profile, with a score of 5.6 out of 10, as it has the highest sales-weighted score among the nine companies assessed. This is primarily because 76% of its 2015 sales are derived from drinking milks, most of which are relatively healthy.
- To reach more people with its products, Mother Dairy pledges "to provide affordable, safe, healthy and tasty products." The company offers discounts on its healthy products and adopts initiatives to reach low-income populations in India. Its performance is above average in Category C, which is generally an area of weakness for many companies assessed on the 2016 India and Global Indexes alike.
- The company states that it complies with the Food Safety and Standards Authority of India (FSSAI) regulations regarding claims it makes on labels, and where applicable the company "takes into account the Codex guidance." This is good practice regarding health and nutrition claims.
- Mother Dairy stands out among its peers assessed for this Index for its fortification of bulk-vended milk with vitamin A for over three decades. It also has been engaging with policymakers and industry to advance national product fortification policies. The company recognized and addressed micronutrient deficiencies ahead of time, making it a role model for other companies operating in India.

## Areas for improvement

- The company could improve its performance by establishing relevant policies and programs, monitoring its activities and publicly reporting, particularly on healthy product formulation strategies, adoption of responsible marketing policies for all consumers, children and stakeholder engagement.
- Although Mother Dairy ranks first in the Product Profile and was estimated to derive 46% of its 2015 sales from healthy products according to the Health Star Rating system, it still has significant scope to reformulate its products to improve their nutritional profile, and/or to develop new, healthier products.
- Mother Dairy should disclose its framework for healthy product innovation. It should also adopt and disclose a Nutrient Profiling System (NPS) to guide the reformulation of its products and developing new healthy products. Upon engagement, Mother Dairy confirmed that it is working on the development of an NPS. The company is also encouraged to establish and report on targets to limit the levels of saturated fats and salt in all relevant products.
- Mother Dairy does not report on policies or monitoring activities with regard to responsible marketing practices and it is the lowest ranking company in Category D (Marketing). The company is encouraged to join industry initiatives, such as the Food and Beverage Alliance of India (FBAI) Pledge and to adopt the International chamber of Commerce (ICC) Framework to demonstrate its commitment to responsible marketing to all consumers.
- Educating consumers and employees about healthy diets and active lifestyles is also an area where the company could significantly improve.
- The company does not have a policy relating to front-of-pack and back-of-pack labeling, although Mother Dairy states that it complies with the Food Safety and Standards Authority of India (FSSAI) regulations.
- Besides its commitment to assist the Government of India on matters related to Codex, the company does not provide any further commentary about how it approaches nutrition policy development in India. Further, it does not disclose any information about how it engages with stakeholders to advance its nutrition strategy and practices.

**i** Although the company participated in the engagement process, it did not sign an NDA agreement, and as a result, it could only submit limited data that it does not consider to be commercially sensitive. This may have influenced the company's scoring and ranking.

**\*\*** The mean HSR is calculated per category and multiplied by the percentage of 2015 sales per category. These figures are totalled and doubled to give a maximum Product Profile score of 10.



# Nestlé India



CORPORATE PROFILE



PRODUCT PROFILE

## Company Description

Nestlé India is a publicly listed company that sells a range of products including and chocolate confectionary, noodles, dairy products and table sauces.

**Headquarters** Switzerland; Gurgaon, India

**Employees** 7,495

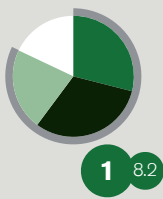
**Total revenues\*** 70,844.4 mn INR

\* Source: Euromonitor

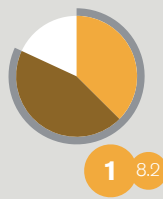
## Product Profile\*\*

	Revenues	Mean HSR rating
Confectionary	38%	0.73
Noodles	16%	1.43
Yogurt	11%	3.38
Coffee whiteners	10%	0.50
Table sauces	9%	2.50
Condensed milk	7%	1.33
Drinking milks	4%	3.00
Dried ready meals	3%	1.83
Dehydrated soup	1%	1.83

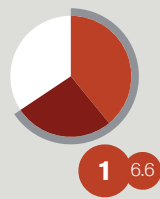
## Corporate Profile



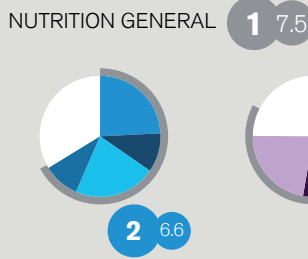
- A **Governance** 12.5%
- A1 Strategy
- A2 Management
- A3 Reporting



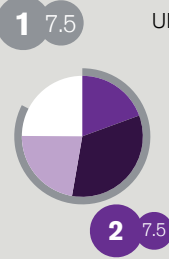
- B **Products** 25%
- B1 Formulation
- B2 Profiling



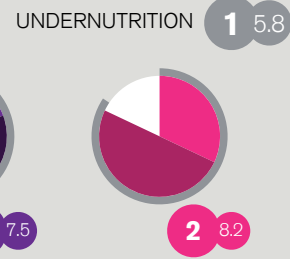
- C **Accessibility** 20%
- C1 Pricing
- C2 Distribution



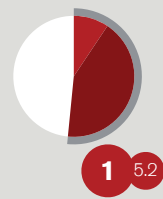
- D **Marketing** 20%
- D1 Policy (all)
- D2 Compliance (all)
- D3 Policy (children)
- D4 Compliance (children)



- E **Lifestyles** 2.5%
- E1 Employees
- E2 Breastfeeding
- E3 Consumers



- F **Labeling** 15%
- F1 Facts
- F2 Claims



- G **Engagement** 5%
- G1 Lobbying
- G2 Stakeholder

■ Highest score among rated companies

## Areas of strength

- Nestlé India ranks number one in the Corporate Profile of the India Index with a score of 7.1.
- Nestlé India implements the global Nutrition, Health, and Wellness (NHW) strategy developed by its parent company. Through this strategy, Nestlé India demonstrates a commitment to integrate nutrition into its core business operations and establishes itself as an industry leader on nutrition issues in the food and beverage industry.
- Nestlé India addresses micronutrient deficiencies both through product fortification and non-commercial initiatives. For example, Nestlé India discloses that it had a partnership with the Dristee Foundation in the past to deliver fortified products to undernourished populations in nutrition awareness camps.
- The company has a Nutrient Profiling System (NPS), developed by its parent company, that applies globally, including its Indian operations. The company discloses that the NPS was established by incorporating recommendations from relevant authorities, such as the World Health Organization (WHO), the Institute of Medicine in the United States and the European Food Safety Authority. Nestlé S.A.'s global NPS was published in the European Journal of Nutrition in February 2016. This high degree of transparency allows consumers and other stakeholders to assess the NPS.
- Nestlé India is an industry leader with respect to strategies to make its healthy products accessible to low-income populations. Nestlé India commits to the Popularly Positioned Products (PPP) strategy developed by its parent. PPPs are designed with the explicit intention of being accessible to less affluent populations.
- Nestlé India, like Nestlé S.A., is an industry leader with respect to committing to provide facilities that support breastfeeding mothers at work – it offers safe, private rooms to express milk, provides refrigerators to store expressed breastmilk, and allows breaks and/or flexible working hours. Nestlé India also has a strong maternity leave policy that allows women to take six months or more of paid maternity leave.

## Areas for improvement

- As noted, Nestlé India applies the NPS of its parent company. It claims that 94% of the products it sells in India meet its healthy standard. However, Nestlé India ranks seventh on the Product Profile with a score of 2.9 out of ten, and was estimated to derive only 6% of its 2015 food sales from healthy products, i.e. achieve a Health Star Rating of 3.5 stars or more, the threshold for healthy. This implies that the company's NPS should be strengthened and that the company has many opportunities to improve the healthiness of its portfolio.
- While Nestlé India has an existing range of fortified products for children over 2, it could also look at developing new fortified products for other undernourished groups, such as women of childbearing age.
- Nestlé India should publicly disclose the results of independent audits of its own compliance in India with its policies on marketing to all consumers and to children.
- Nestlé India is encouraged to move towards exclusively supporting nutrition education and active lifestyle programs developed by independent expert organizations, and commissioning and publishing independent evaluations of such programs.
- Nestlé India could improve its back-of-pack nutritional labeling to bring it fully into line with Codex recommendations. The George Institute found that only 61% of the company's labels currently comply with such recommendations.
- With respect to BMS marketing, Nestlé India demonstrated a high level of compliance with the Indian IMS Act and The Code in the IGBM-based study conducted in Mumbai over the summer of 2016. Two informational and educational materials produced by the company were found in healthcare facilities, which are prohibited by the IMS Act.

**i** Nestlé India was evaluated in the BMS assessment as it produces and markets BMS products in India. The company's Corporate Profile score has been adjusted by -0.25 to reflect the findings of the BMS assessment.

**\*\*** The mean HSR is calculated per category and multiplied by the percentage of 2015 sales per category. These figures are totalled and doubled to give a maximum Product Profile score of 10.



# Parle Products



CORPORATE PROFILE



PRODUCT PROFILE

## Company Description

Parle Products is a private company. Its largest product categories are sweet and savoury biscuits, confectionery and savory snacks.

**Headquarters** Mumbai, India

**Employees** Not available

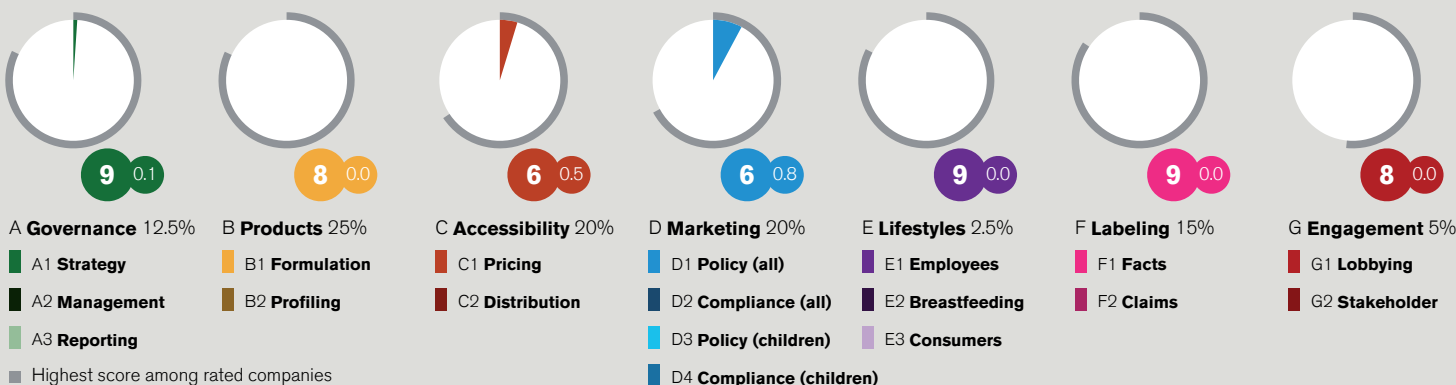
**Total revenues\*** 78,584.2 mn INR

\* Source: Euromonitor

## Product Profile\*\*

	Revenues	Mean HSR rating
Sweet biscuits	72%	1.55
Savoury biscuits	11%	2.00
Confectionery	10%	0.88
Savoury snacks	8%	2.33

## Corporate Profile



## Areas of strength

- Overall, the company's disclosure is limited and therefore no clear areas of strengths were identified.

## Areas for improvement

- In general, Parle Products' limited disclosure means that no clear strengths were identified in the Corporate Profile research. Better disclosure by the company about its approach to tackling the double burden of malnutrition in India, in terms of nutrition governance, product formulation, affordability and accessibility, responsible marketing practices, lifestyles, labeling and nutrition engagement, would allow for a more complete assessment and identification of specific areas for improvement. Additionally, engagement with Access to Nutrition Foundation (ATNF) would allow a complete assessment of Parle Products' policies and practices. Parle Products is encouraged to engage with ATNF for the next India Index.

- The Product Profile study, carried out by The George Institute, assessed 75 Parle products across four product categories. Parle Products ranked fifth on the Product Profile with a score of 3.2 out of 10. The company was estimated to derive only 3% of its 2015 total sales from healthy products, i.e. achieve a rating of 3.5 stars or more on the Health Star Rating system, the threshold for a healthy product. This shows that it has significant scope to reformulate its products to improve their nutritional profile, and/or to develop new, healthier products.

- Parle Products could improve its back-of-pack nutritional labeling to bring it into line with Codex recommendations. The George Institute found that none of the company's labels currently comply with such recommendations.

**i** Parle publishes little information pertaining to its nutrition practices and did not provide any information upon request during the research. As a result, it has been difficult to assess the company for the 2016 India Index.

**\*\*** The mean HSR is calculated per category and multiplied by the percentage of 2015 sales per category. These figures are totalled and doubled to give a maximum Product Profile score of 10.





# PepsiCo India



CORPORATE PROFILE



PRODUCT PROFILE

## Company Description

PepsiCo India is a publicly listed company that sells a range of products including savory snacks, juice drinks, regular cola carbonates and non-cola carbonates.

**Headquarters** United States; Gurgaon, India

**Employees** 4,789

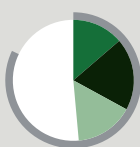
**Total revenues\*** 133,300.99 mn INR

\* Source: Euromonitor

## Product Profile\*\*

	Revenues	Mean HSR rating
Savory snacks	47%	1.10
Juice drinks (up to 24% Juice)	19%	0.71
Regular cola carbonates	11%	1.00
Other non-cola carbonates	6%	1.00
Lemonade/limeade	5%	1.00
Still bottled water	5%	5.00
Orange carbonates	4%	0.50
Mixers	1%	5.00
Hot cereals	1%	3.29
Sports drinks	1%	1.50

## Corporate Profile



A **Governance** 12.5%

- A1 Strategy
- A2 Management
- A3 Reporting



B **Products** 25%

- B1 Formulation
- B2 Profiling



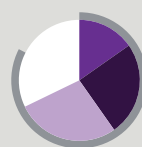
C **Accessibility** 20%

- C1 Pricing
- C2 Distribution



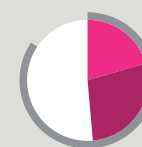
D **Marketing** 20%

- D1 Policy (all)
- D2 Compliance (all)
- D3 Policy (children)
- D4 Compliance (children)



E **Lifestyles** 2.5%

- E1 Employees
- E2 Breastfeeding
- E3 Consumers



F **Labeling** 15%

- F1 Facts
- F2 Claims



G **Engagement** 5%

- G1 Lobbying
- G2 Stakeholder

■ Highest score among rated companies

NUTRITION GENERAL **3** 4.3

UNDERNUTRITION **5** 1.3

## Areas of strength

- PepsiCo India is one of the top three companies on the Corporate Profile in the 2016 India Index. This is a better result than that of its parent sixth ranking in the 2016 Global Index.
- PepsiCo India is one of the top performing companies in the 2016 India Index on product reformulation. It is committed to providing an increasing number of healthier products to consumers, such as Quaker Oats Plus that was launched in 2014. It has a formal commitment to invest in R&D, set reduction targets for sodium, saturated fats and sugars in its products and has a comprehensive Nutrient Profiling System (NPS).
- The company's approach to responsible marketing is consistent with PepsiCo Inc. and in line with industry standards. PepsiCo Inc. has a comprehensive responsible marketing strategy for adults and children and has internal and external compliance checks.
- Compared to the 2016 Global Index, PepsiCo India demonstrates a wider range of commitments and programs aimed at improving health and well-being of its employees, consumers and community members in India. The Get Active program, operating since 2006, educates children about healthy diets and active lifestyles. In contrast to its parent company, in India, the company has policies on maternity leave and provides facilities to accommodate the needs of breastfeeding mothers at work.
- The company's approach to nutrient labeling is fully aligned with that of its parent. However, unlike the 2016 Global Index, PepsiCo India provided more information about its practices related to health and nutrition claims, namely that all claims are scientifically substantiated and compliant with local regulations.

## Areas for improvement

- Despite its relatively good score in the Corporate Profile, PepsiCo India still has many opportunities to improve the healthiness of its portfolio, given that it ranked eighth on the Product Profile with a score of 2.5 out of 10, and was estimated to derive only 8% of its 2015 total sales from healthy products, i.e. achieve a rating of 3.5 stars or more on the Health Star Rating system, the threshold for a healthy product.
- The company could also improve its disclosure of the governance arrangements for its nutrition strategy.
- Similar to its parent in the 2016 Global Index, PepsiCo India has an opportunity to enhance its reporting on its policies and programs regarding the affordability and accessibility of its healthy products. However, it should be noted that unlike its parent, PepsiCo India has started disclosing examples of relevant initiatives and partnerships in India centered around fortified products.
- PepsiCo India should consider increasing disclosure of its policies, programs and strategies designed to contribute to healthy lifestyles in India. Better disclosure would enable the various stakeholders to gain a better understanding of the company's performance in this area.
- Although PepsiCo India stated that it follows Codex guidelines with respect to nutrition claims, the Product Profile assessment carried out by The George Institute found that only 17% of its product labels comply with Codex nutrition labeling standards.
- Unlike PepsiCo Inc. in the 2016 Global Index, PepsiCo India is not transparent about its lobbying activities, presenting an opportunity for improvement. Further, the company is encouraged to increase disclosure of its stakeholder engagement activities, including the names of organizations it engages with, topics of engagement and how feedback is used to inform its nutrition and undernutrition strategies in India.
- PepsiCo India has provided less information on its product fortification strategy to combat undernutrition in India than its parent company did for the 2016 Global Index. This signals that the company has an opportunity to improve its public reporting practices in this area.

\*\* The mean HSR is calculated per category and multiplied by the percentage of 2015 sales per category. These figures are totalled and doubled to give a maximum Product Profile score of 10.

