Report on the comparative nutritional profile of 1,901 food and beverage products marketed by 20 large global companies operating in India.

Prepared by The George Institute for the Access to Nutrition Initiative

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FOODSWITCH

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EXECUTIVE SUMMARY

The overall goal of this work is to provide stakeholders, including companies, government, nutrition experts and others, with a fuller understanding of the nutritional quality of packaged food and non-alcoholic beverage products sold by the largest manufacturers operating in India. Nutrient information for 1,901 packaged food and beverage products sold by 20 companies in 2023 were included in analysis. Nutrient information was obtained either from The George Institute's FoodSwitch India database or directly from the manufacturer.

First, two nutrient profiling methods were selected to evaluate each company's product portfolio. The Australasian Health Star Rating (HSR) system was used to assess the healthiness of company product portfolios and the World Health Organization's South East Asia Regional Office (WHO SEAR) nutrient profile model was used to assess the proportion of products in each company's portfolio eligible to be marketed to children. The proportion of products that could be considered 'healthy' using the HSR was determined using a cut-off of 3.5 out of 5.0 stars and was examined both by company and by food/beverage category. Each company was then ranked by the mean HSR of their product portfolio, the proportion of their portfolio that was considered 'healthy' and the proportion of products meeting WHO SEAR eligibility criteria. Results were weighted using sales data from Euromonitor International.

The mean healthiness of companies' products was found to be 1.9 stars out of 5.0 (2.0 when data were weighted by sales), with substantial variation observed between companies. A low proportion (17%) of products met the HSR 'healthy' cut-off of 3.5 out of 5.0 stars increasing to 24% when results were weighted by category and company sales. Only 12% of products overall were eligible to be marketed to children according to the WHO SEAR criteria, increasing to 21% after sales-weighting was applied. Sales-weighting changed the rankings of the companies in relation to healthiness and generally increased the disparities observed between companies.

There were significant strengths and some important weaknesses relating to the research process. For example, six companies were not willing to review and provide corrections and/or additions to the list of their product portfolio and nutrition composition of their products that were prepared by TGI and shared by ATNI with all 20 companies. Although this is a major improvement compared to the response rate for the 2020 India Product Profile, it remains difficult to determine the level of market coverage achieved by the inclusion of these 1,901 products. On balance, it is reasonable to conclude that the average healthiness of the products provided and sold by the largest Indian food companies is sub-optimal. Further, there are important differences between companies that could be addressed by investments that target improvements in the product mix as well as the reformulation of less healthy products. The low number of products eligible for marketing to children is indicative of the unhealthy nature of most of the products offered by India's largest food and beverage manufacturers.

In addition to the remedial actions that the companies could take, there is a clear opportunity for the Government of India to introduce effective and enforceable legislation that prevents the marketing of unhealthy products to children.

BACKGROUND

The George Institute for Global Health's mission is to improve the health of millions of people worldwide. More specifically, the Food Policy Division works to reduce rates of death and disease caused by diets high in salt, saturated fat, sugar and excess energy by undertaking research and advocating for a healthier food environment. The Division's main areas of activity are quantifying the healthiness of the food supply, encouraging food reformulation, and developing innovative approaches to encourage consumers to make healthier food choices.

In 2023, The George Institute was commissioned by the Access to Nutrition Initiative (ATNI) to produce the third *Product Profile* for India to input into the *India Spotlight Index 2023*. The Index will score and rank the contribution of India's largest food and beverage manufacturers to tackling the country's double burden of malnutrition. It will consist of an analysis of those companies' policies, practices and disclosures (the *Corporate Profile*), which includes an analysis of the nutritional quality of each company's food and beverage products in the Indian market (the *Product Profile*).

The George Institute was selected to undertake this study given its established presence in India with offices in Hyderabad, Bangalore and New Delhi, and its FoodSwitch India database, which contains nutrition information for over 10,000 packaged food and beverage products in the Indian food supply. The George Institute also undertook analysis related to the 2016 and 2020 India *Product Profiles*. The ATNI team, who had access to sales data from the Euromonitor International database through a licensing agreement, also did a series of sales-weighted analyses that have been included in this report.

This report sets out the objectives, methods, results and interpretation of the India *Product Profile* analysis done in 2023 for the *India Spotlight Index 2023*.

OVERALL GOAL

The overall goal of this work is to provide stakeholders, including companies, government, nutrition experts and others with a fuller understanding of the healthiness of packaged food and non-alcoholic beverage products (hereafter "foods and beverages") sold by 20 of the largest manufacturers in India.

METHODOLOGY

Selection of companies

ATNI requested The George Institute include the products of 20 manufacturers with the highest estimated packaged food and beverage retail sales in India in 2022.[3] These encompass 14 of the companies included in the 2020 India Index, plus another six large India-based companies. Compared to 2020, the scope of included companies was broadened by ATNI in 2023 to assess a wider range of packaged food and beverage products with a major impact on the diet and health of consumers in India, produced by a balance of India-based and multinational companies. The included companies, in alphabetical order, with the name used throughout this report in brackets are:

- Adani Wilmar Limited (Adani Wilmar)
- Agro Tech Foods Limited (Agro Tech Foods)
- Britannia Industries Limited (Britannia)
- Coca-Cola India (Coca-Cola India)
- Dabur India Limited (Dabur)
- Gujarat Cooperative Milk Marketing Federation (Amul)
- Haldiram's Snacks Private Limited (Haldiram's)
- Hatsun Agro Products Limited (Hatsun Agro / HAP)
- Heritage Foods Limited (Heritage Foods)
- Hindustan Unilever Limited (Hindustan Unilever / HUL)
- ITC Limited (ITC)
- Karnataka Cooperative Milk Producers Federation (KMF Nandini)
- Lactalis India (Lactalis India)
- Marico Limited (Marico)
- Mondelēz India Foods Private Limited (Mondelēz India)
- Mother Dairy Fruit & Vegetable Private Limited (Mother Dairy)
- Nestlé India Limited (Nestlé India)
- Parle Products Private Limited (Parle Products)
- Patanjali Foods Limited (Patanjali)
- PepsiCo India Holdings Pvt Ltd. (PepsiCo India)

Choice of nutrient profile model

Nutrient profiling is the science of classifying or ranking foods according to their nutritional composition for the purpose of preventing disease and promoting health.[4] Nutrient profile models have been developed by academics, government departments, health-related charities and the food industry for a variety of applications including: to underpin food labelling; to regulate advertising of products to children; and to regulate health and nutrition claims. Although nutrient profiling is a tool to quantify aspects of individual foods, not diets, nutrient profile models are commonly used to underpin policies designed to improve the overall nutritional quality of diets. The *2020 India Product Profile* utilised the Australasian Health Star Rating model and the WHO South East Asia Region (WHO SEAR) Nutrient Profile Model (NPM).

The Health Star Rating is a front-of-pack interpretive nutrition labelling system designed to assist consumers in making healthier choices. The underlying nutrient profile model assesses risk nutrients (overall energy, sodium, total sugar, saturated fat) and positive food components (fruit and vegetable content, protein, fibre and in some cases, calcium) to score products on the basis of nutritional composition per 100g or 100mL across one of six categories. These scores are then converted to a 'Health Star Rating' from 0.5 to 5 stars. Development was led by the Australian government in collaboration with industry, public health and consumer groups, and builds upon the Nutrient Profiling Scoring Criteria (NPSC)

[3] Data extracted from Euromonitor International International's 2022 industry publications of; Packaged Food, Hot Drinks and Soft Drinks.

[4] World Health Organization, Nutrient Profiling http://www.who.int/nutrition/topics/profiling/en/

previously developed by the Australian and New Zealand Governments to regulate health claims.[5] The NPSC itself was developed from the United Kingdom's Ofcom model. The HSR has been implemented in Australia since June 2014 on a voluntary basis. The system has also been adopted in New Zealand. Further detailed information is available online.[6] Of note is that in 2020, an update to the algorithm underpinning the HSR was released, modifying the scores that some products were able to receive. To allow manufacturers and consumers alike to understand the difference between the original and the updated algorithms, key differences between the original HSR algorithm and the new HSR algorithm are outlined in **Table 1**. For the *2023 India Product Profile*, the most current HSR algorithm was used.

The WHO SEAR model is a nutrient profile model designed primarily for use and adaptation by Member States of the WHO South East Asian Region when developing policies to restrict food marketing to children. The model was developed in 2016. The WHO SEAR model has food and beverage categories relevant to India and hence has been used in the *2020 India Product Profile* and is used in the current *2023 India Product Profile*. The model operates by first requiring foods to be allocated to one of 25 categories. Products are then checked against category-specific compositional thresholds for nutrients and other food components. A product must not exceed on a per 100g/mL basis any of the relevant thresholds for that product category if marketing is to be permitted. Results under this model are simply expressed on a binary basis i.e. 'marketing permitted' or 'marketing not permitted'. In the absence of relevant Indian regulation in this area, the model was selected as a reasonable basis by which to determine products' suitability to be marketed to children.

***Table 1** Changes between the original and updated HSR algorithms*

Original HSR algorithm	Updated HSR algorithm	Examples of impact
Nutrients included in category 1 beverages: Energy, protein, saturated fat, total sugars, sodium and V points	Nutrients included in category 1 beverages: Energy, total sugar and V points	Juices are unable to score an HSR of 5.0. Many zero calorie beverages increase from a maximum HSR of 2.5 to 3.5.
V points the same as for all food and beverage products (score from 0-8)	V points modified solely for category 1 beverages (score from 0-10)	Juices can now score V points with lower % of FVNL (25%+) compared to the original algorithm.
Unsweetened waters use the same algorithm as all other category 1 beverages	Unsweetened flavoured waters are given an automatic HSR of 4.5	Scores increase for unsweetened flavoured water products from a previous HSR of 2.5 to 4.5 (for products with no added sugar or sweeteners)
Fresh and minimally processed fruits and vegetables use the same algorithm as all other foods	Fresh and minimally processed fruits and vegetables are given an automatic HSR of 5.0	Some packaged fruit and vegetable products with minimal processing now have a higher HSR than when using the original algorithm.
Points given for total sugar and sodium content for category 1D, 2 and 2D products.	Points given for total sugar and sodium content have been modified from the original algorithm for category 1D, 2 and 2D products.	Examples include that in the original HSR algorithm, any product with >8106mg/100g sodium would receive 30 points (with more points indicating a worse rating) and in the updated HSR algorithm products with >2700mg/100g receive the same number of points. Stricter points for total sugar and sodium mean that products with high sugar and/or sodium will score more poorly in the updated HSR algorithm compared to the original algorithm.
Points allocated to each star rating for category 2D foods	Category 2D products were able to achieve a higher HSR under the updated algorithm compared to the original algorithm	Some (not all) category 2D products that received 0.5 HSR under the original algorithm are able to score up to 2.5 under the updated algorithm.

[5] See Australia New Zealand Food Standards Code, Standard 1.2.7

[6] Department of Health, Australian Health Star Rating website: http://healthstarrating.gov.au

To work optimally, nutrient profile models rely on the availability of comprehensive nutrition information. In the Indian context, national nutrition labelling legislation generally only requires the display of energy content (in kilocalories), protein, carbohydrates, total sugars and total fats.[7] Amounts of other nutrients are only required where a nutrient content claim is made. **Table 2** below displays the alignment between nutrients required for the operation of the HSR, and those required to be declared on Indian nutrition labels. Calculating a nutrient profile score for a product requires values for all data points used by the nutrient profile model and imputation of missing data was therefore required for India.

***Table 2** Alignment of nutrients required for the Health Star Rating and WHO SEAR with those required by Indian labelling legislation*

	Indian Regulations	HSR	WHO SEAR
Total number of nutrients required	**5**	**9**	**7**
Protein	✓	✓	
Fibre		✓	
Fruit and vegetable content		✓	
Energy	✓	✓	✓
Total fat	✓		✓
Saturated fat		✓	✓
Carbohydrate	✓		
Total sugars	✓	✓	✓
Added sugars		✓	✓
Other sweeteners		✓	✓
Sodium		✓	✓

= nutrients required by both specified profiling model and Indian labelling legislation

Eligibility of food and beverage products

Foods and beverages eligible for inclusion were defined as *'all packaged foods and non-alcoholic beverages manufactured by the included companies available for purchase in India.'* A food or beverage was considered a unique item based on the brand name and description irrespective of serving size and packaging (i.e. a specific brand of cola sold in 330mL cans was considered to be the same food item as the same specific brand of cola sold in 600mL bottles). However, if two products with the same name and description existed yet had different nutrient values, both products were retained in the analysis.

The following products were excluded from analyses:

1. Unprocessed meat, poultry and fish (on the basis that such foods are not generally required to carry a nutrient declaration)
2. Plain tea and coffee (on the basis that these make an inherently low nutritional contribution and are thereby not required to display a nutrient declaration)
3. Condiments such as herbs, salt, pepper, vinegars and spices (on the basis that these make an inherently low nutritional contribution and are thereby not required to display a nutrient declaration)
4. Infant formulas, and baby food and baby beverages (excluded because these products are not consumed by the general population and the selected models are not appropriate for their evaluation).

[7] *Food Safety and Standards (Packaging and Labelling) Regulations 2011* (India)

Product identification and data review

Two data sources were used to create a product list for each manufacturer comprising nutritional information:

- Products in the FoodSwitch India database with data entered or updated from 1st January 2020 (i.e. all products since the *2020 India Product Profile*)
- Products from the *2020 India Product Profile* and the *2020 Global Product Profile*

In May 2023, the 20 companies were asked whether they wished to provide data for analysis using a provided template, or whether they preferred to be provided with their 2020 data for review (product list and nutrient content) and offered an opportunity to make corrections or additions to information about their product range. Fourteen of the 20 companies either reviewed or provided data for the *2023 India Product Profile* analysis.

Imputation of essential missing data

Health Star Rating

For the purposes of generating a Health Star Rating, proxy values were used for missing values of saturated fat, sugar, fibre and sodium, but *only* if the product label included energy and at least two of the four required nutrients for the analysis (saturated fat, sugar, sodium, protein) otherwise the product was excluded. These decisions were a pragmatic compromise between enabling analysis of the majority of identified products versus basing analysis on mostly proxy data. The imputation of missing data was done as follows:

- Proxy values for saturated fat, total sugar, sodium, fibre and 'fruit vegetable nut and legume' (FVNL) content were developed by using available data for 1,037 global food categories and more than 400,000 products in the full Global FoodSwitch database (regardless of manufacturer). The average value of the products with available data was estimated for each category and assigned to those products in that category with missing data.

WHO SEAR NPM

For the purposes of generating an outcome under the WHO SEAR NPM, proxy values were used for total fat, saturated fat, sugar and sodium, but *only* if the product was not missing three or more nutrients required for analysis. Eligibility was determined category-by-category as per the WHO model which uses different nutrients for each WHO-specified category. For some products, the available nutritional information was insufficient to apply the WHO SEAR eligibility criteria. It was therefore necessary to impute missing data which was done as follows:

- Proxy values for saturated fat, total sugar and sodium contents were developed by using available data for 1,037 global food categories and more than 400,000 products in the full Global FoodSwitch database (regardless of manufacturer). The average value of the products with available data was estimated for each category and assigned to those products in that category with missing data.
- For added sugars a standard proportion of total sugars was assumed and was specified at the category level:
    - For cakes and desserts, confectionery, sauces and beverages (excluding milk), total sugar values were assigned as '*added sugars'*
    - For milks and yoghurts, an amount of sugar of up to 6g/100g and 8g/100g respectively was considered to be naturally occurring. These are reasonable values based upon known concentrations of lactose in these products. Any amount over this was assigned as *'added sugars'.*

Table 3 outlines the sources of nutrient information used in generating nutrient profile scores. For most products, the available nutritional information was insufficient to apply the selected nutrient profile models.

Table 3 Sources of information relied upon in applying the Health Star Rating and WHO SEAR eligibility criteria

	HSR	WHO SEAR
Total products analysed	***1,901***	***1,901***
All data direct from label	1,157	1,679
Proxy data required for one nutrient	494	163
Proxy data required for two nutrients	250	59

Product categorisation

Products were categorised in four ways:

- To one of 1,037 categories within the global FoodSwitch database.
- As either a food or beverage product.
- To one of 25 categories under the WHO SEAR NPM.
- To one of 21 categories within the Euromonitor International food and beverage categorisation system. This categorisation was made to enable the nutrition analysis to be combined with sales data.

Groupings of Euromonitor International categories and sub-categories – hereafter called 'EMI subsets' - were made to generate subsets of products of sufficient size to allow nutritional analysis of comparable food products. Of note, results for milk drinks are presented as 'foods' not 'drinks' according to Euromonitor International's method of classification but were considered beverages when calculating their nutrient profile results.

Table 4 EMI subsets

Foods	Beverages
Baked Goods	Bottled Water
Breakfast Cereals	Carbonates
Confectionery	Concentrates
Dairy	Energy Drinks
Edible Oils	Juice
Flour	Other Hot Drinks
Ice Cream	
Processed Fruit and Vegetables	
Processed Meat, Seafood and Alternatives to Meat	
Rice, Pasta and Noodles	
Sauces, Dips and Condiments	
Savoury Snacks	
Soup	
Sweet Biscuits, Snack Bars and Fruit Snacks	
Sweet Spreads	

Definitions for subsets can be found on ATNI's website

Sales data

Sales data were obtained at the EMI subset level for each company. This was used to generate sales-weighted outcomes for analyses. As ATNI held the licence for the Euromonitor International data, ATNI did the analyses and provided The George Institute with results. ATNI accepts full responsibility for these components of the report. The sales data were those for the 2021 period. Where a category did not command 1% or more market share in a company, it was excluded from analysis.

Analysis strategy

There were six research questions addressed:

1. *What is the average nutritional quality of each company's product portfolio and how do companies compare?* The metric used was the mean Health Star Rating of the product portfolio.

2. *What is the average sales-weighted nutritional quality of each company's product portfolio and how do companies compare?* The metric used was the sales-weighted mean Health Star Rating of the product portfolio.

3. *What proportion of each company's products are 'healthy' and how do companies compare?* The metric used was the proportion of the product portfolio that had a Health Star Rating of 3.5 stars or above.

4. *What proportion of each company's product sales are 'healthy' and how do companies compare?* The metric used was the sales-weighted proportion of products that had a Health Star Rating of 3.5 stars or above.

5. *What proportion of each company's products are eligible to be marketed to children and how do companies compare?* The metric used was the proportion of the product portfolio meeting WHO SEAR eligibility criteria for marketing to children.

6. *What proportion of each company's product sales are eligible to be marketed to children and how do companies compare?* The metric used was the sales-weighted proportion of products meeting WHO SEAR eligibility criteria for marketing to children.

The data were analysed using STATA statistical software version 17.

RESULTS

Products included

Initially, 1,960 products were identified manufactured by the 20 included companies. Of these, 44 were excluded as they did not have sufficient baseline data to conduct the HSR algorithm, and 15 were excluded as duplicate products of different pack size. This left 1,901 unique products for analysis from 20 companies.

Table 5 *Number of food products by company in EMI subsets*

EMI subset	Adani Wilmar	Agro Tech Foods	Amul	Britannia	Dabur	Haldiram's	Hatsun Agro	Heritage Foods	HUL	ITC	KMF Nandini	Lactalis India	Marico	Mondelēz India	Mother Dairy	Nestlé India	Parle Products	Patanjali	PepsiCo India	Total
Baked Goods	0	0	0	70	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	70
Breakfast Cereals	0	0	0	0	0	0	0	0	0	0	0	0	8	0	0	0	0	0	4	12
Confectionery	0	0	0	0	0	0	0	0	0	100	0	0	0	43	0	67	17	0	0	227
Dairy	0	0	55	37	0	0	29	44	0	0	74	65	0	0	61	31	0	3	0	399
Edible Oils	9	12	0	0	0	0	0	0	0	0	0	0	3	0	8	0	0	12	0	44
Flour	1	0	0	0	0	0	0	0	0	15	0	0	0	0	0	0	0	2	0	18
Ice Cream	0	0	20	0	0	0	84	0	140	0	0	0	0	0	104	0	0	0	0	348
Processed Fruit & Veg	0	0	0	0	0	0	0	0	0	0	0	0	0	0	23	0	0	0	0	23
Processed Meat & Seafood	1	0	0	0	0	0	0	0	0	0	0	0	4	0	0	0	0	3	0	8
Rice, Pasta & Noodles	7	0	0	0	0	0	0	0	0	12	0	0	0	0	0	37	0	0	0	56
Sauces, Dips & Condiments	0	0	0	0	15	0	0	0	26	0	0	0	0	0	0	24	0	0	0	65
Savoury Snacks	0	57	0	10	0	68	0	0	0	46	0	0	0	0	0	0	28	0	39	248
Soup	0	0	0	0	0	0	0	0	19	0	0	0	0	0	0	0	0	0	0	19
Sweet Biscuits	0	0	0	76	0	0	0	0	0	60	0	0	0	11	0	0	40	0	0	187
Sweet Spreads	0	12	0	0	4	0	0	0	7	0	0	0	0	0	0	0	0	5	0	28
Total	**18**	**81**	**75**	**193**	**19**	**68**	**113**	**44**	**192**	**233**	**74**	**65**	**15**	**54**	**196**	**159**	**85**	**25**	**43**	**1,752**

Table 6 Number of beverage products by company in EMI subsets

EMI subset	Coca-Cola India	Dabur	HUL	Mondelēz India	PepsiCo India	Total
Bottled Water	6	0	0	0	0	6
Carbonates	23	0	0	0	13	36
Concentrates	0	0	0	3	0	3
Energy Drinks	0	0	0	0	1	1
Juice	26	40	0	0	13	79
Other Hot Drinks	0	0	18	6	0	24
Total	**55**	**40**	**18**	**9**	**27**	**149**

The number of products examined in this report ranged from 15 products for Marico to 233 products for ITC. The biggest EMI subsets were *Dairy* (n=399), *Ice Cream* (n=348) and *Savoury Snacks* (n=248). The smallest subsets were *Energy Drinks* (n=1) and *Processed Meat, Seafood and Alternatives to Meat* (n=8).

Figure 1 *Proportion of revenue deriving from each food and beverage category, by company*

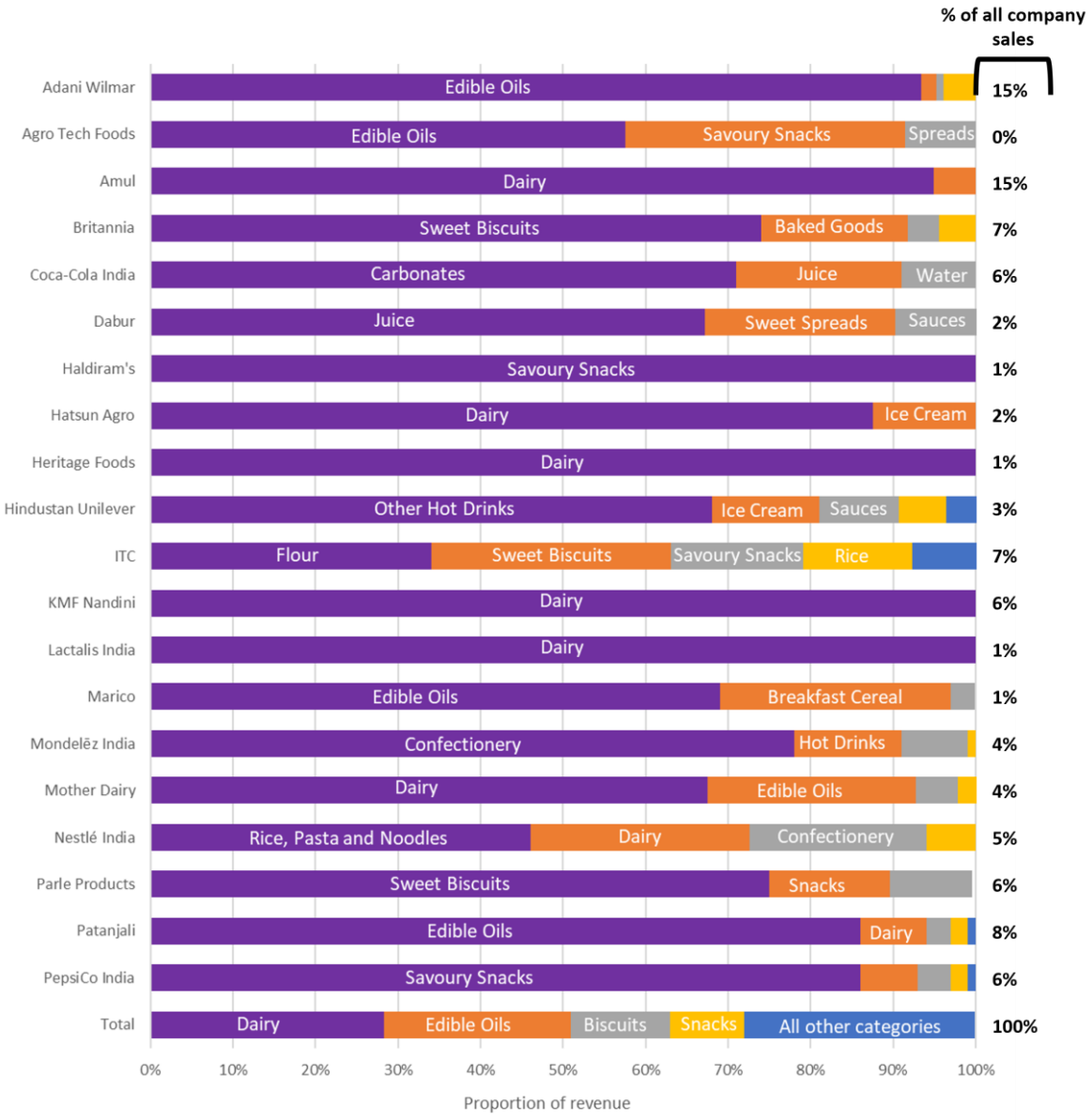


Figure 1 depicts the proportion of revenue that each category represents (out of the categories used in analysis) for each company. Overall, Amul and Adani Wilmar represented the largest proportion of overall revenue (15% each).

Figure 2 *Proportion of revenue deriving from each company, by category*

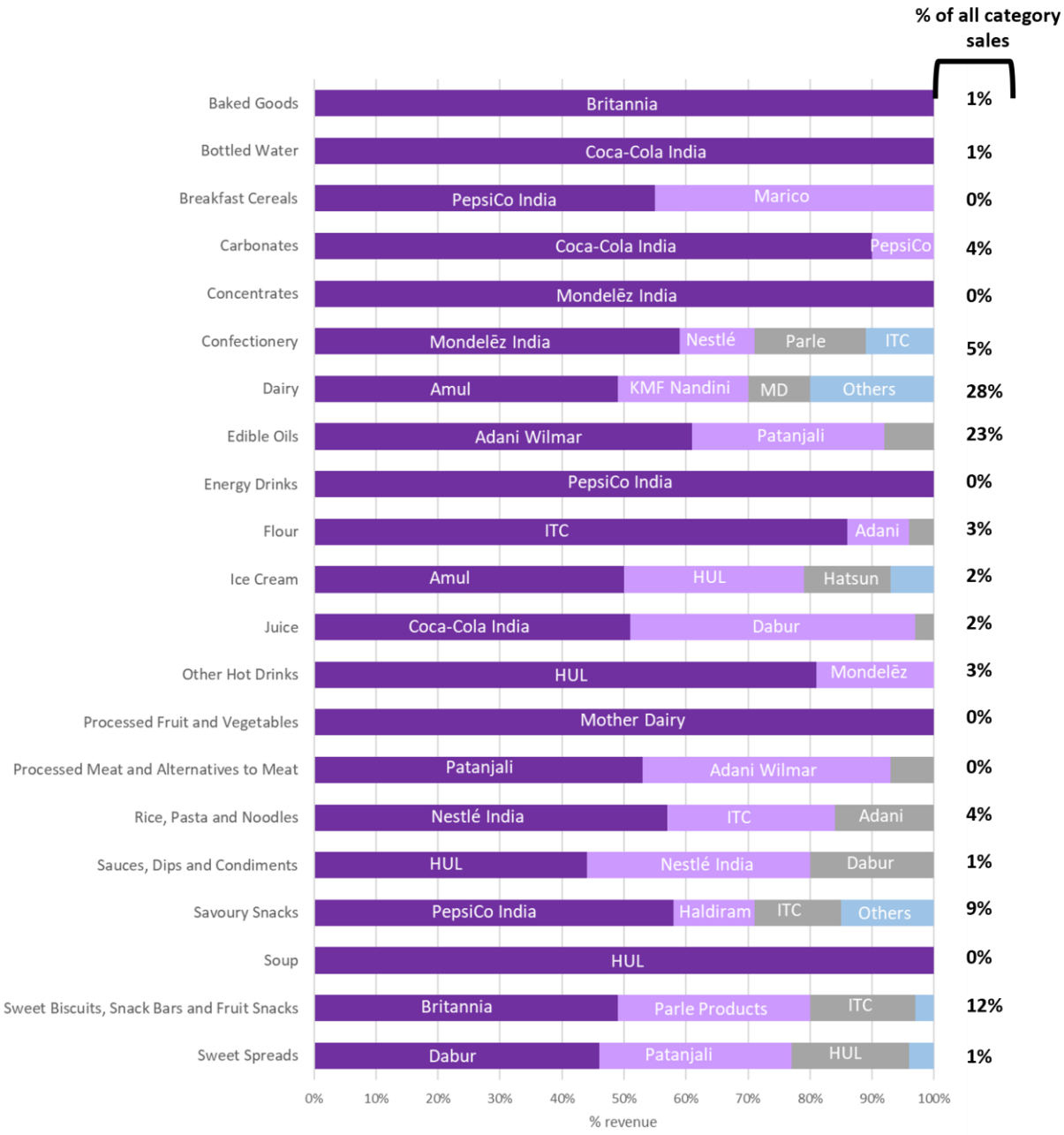
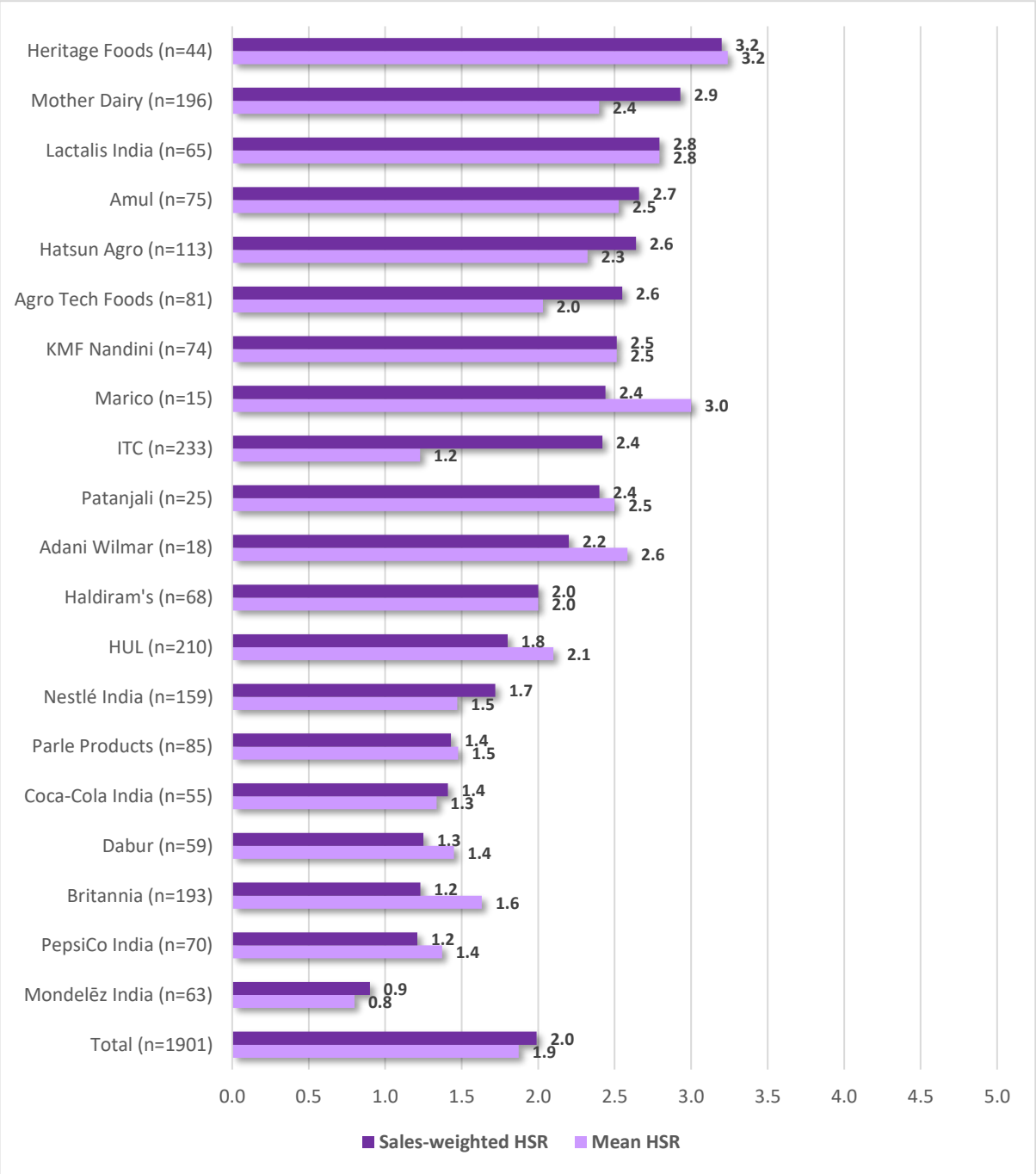


Figure 2 depicts the proportion of revenue that each company represents within each category examined in analysis. Overall, *Dairy* and *Edible Oils* represented the largest proportion of revenue (28% and 23%, respectively).

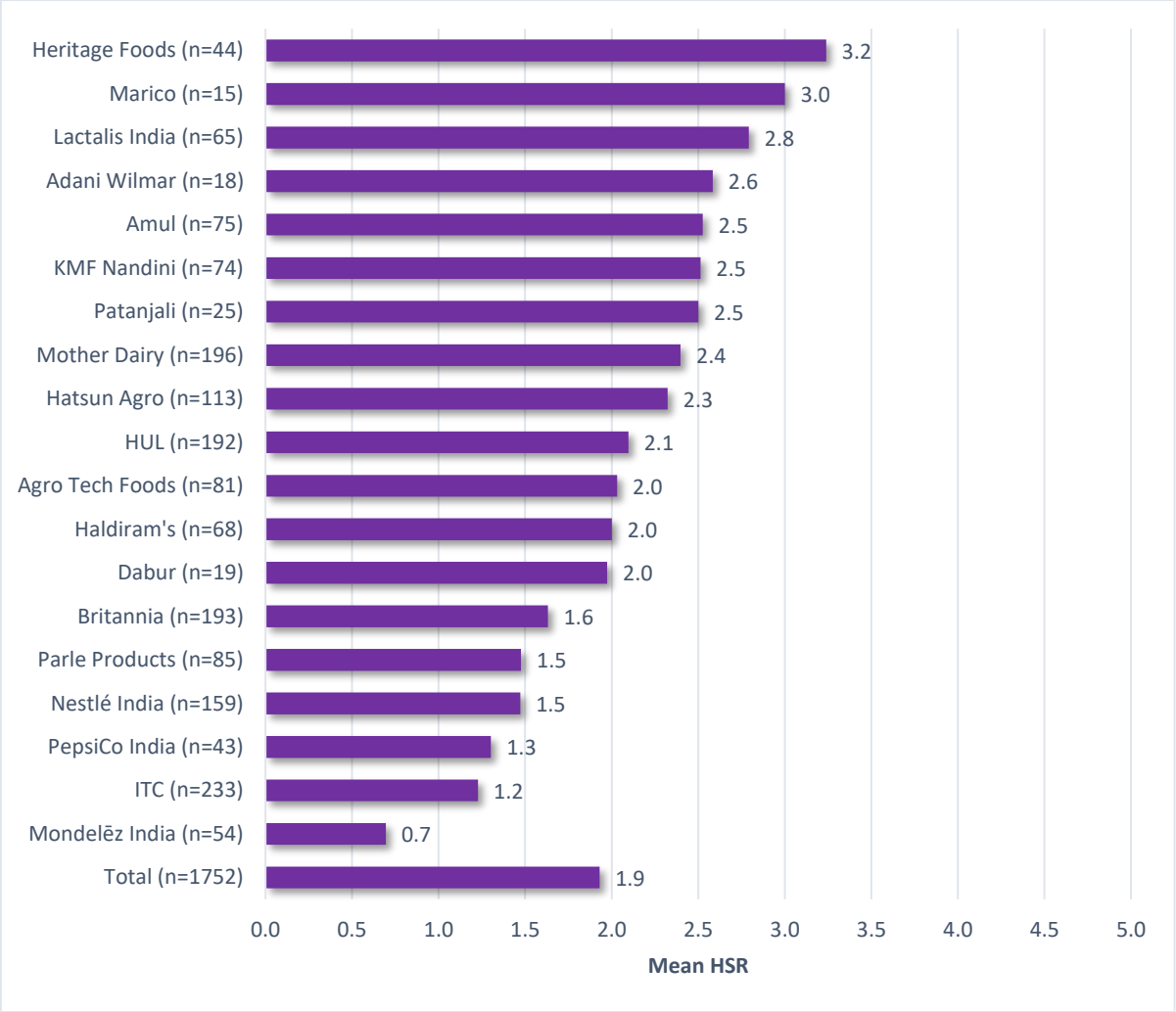
ANALYSIS 1 and 2 *Corporate rankings based upon mean nutrient profile of products and sales-weighted nutrient profile of products*

Figure 3 *Mean Health Star Rating and sales-weighted mean Health Star Rating by company – overall product portfolio (20 companies)*



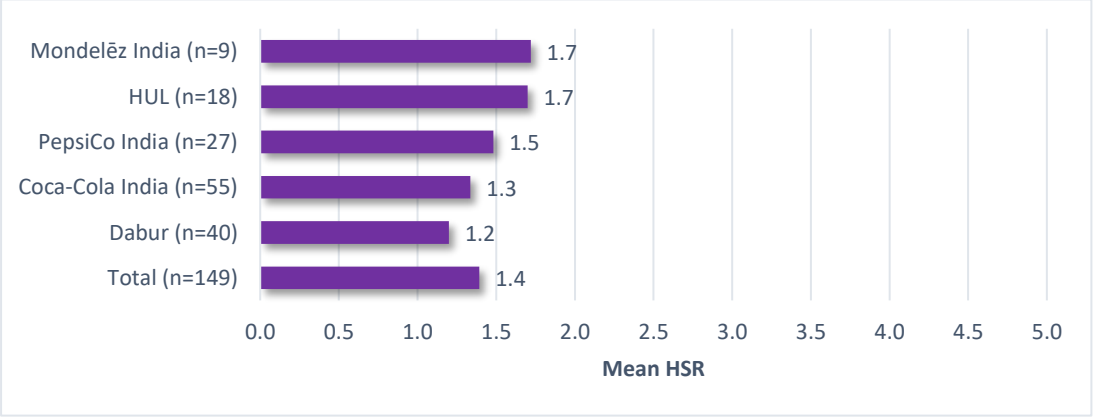
Overall, mean HSR was 1.9 stars out of 5.0, increasing to 2.0 stars following sales-weighting (indicating healthier products accounted for a slightly higher proportion of sales). Heritage Foods had the highest sales-weighted HSR of 3.2 out of 5.0, followed by Mother Dairy with 2.9. Mondelēz India had the lowest mean sales-weighted HSR of 0.9. Marico was the second-ranked company before sales-weighting was applied, when it then dropped to eighth place. Other companies with notable changes before and after sales-weighting was applied include Britannia (which dropped four ranking places following sales-weighting).

Figure 4 *Mean Health Star Rating by company – foods (19 companies)*



Heritage Foods had the highest mean HSR for food products of 3.2, followed by Marico with 3.0 and Lactalis India with 2.8. Overall mean HSR for foods was low at only 1.9 stars out of 5.0 for all companies combined.

Figure 5 *Mean Health Star Rating by company – beverages (5 companies)*



Ratings for beverages were lower than for foods. Mondelēz had the highest mean HSR of 1.7, and Dabur the lowest with 1.2.

Figure 6 *Mean Health Star Rating by category - foods*

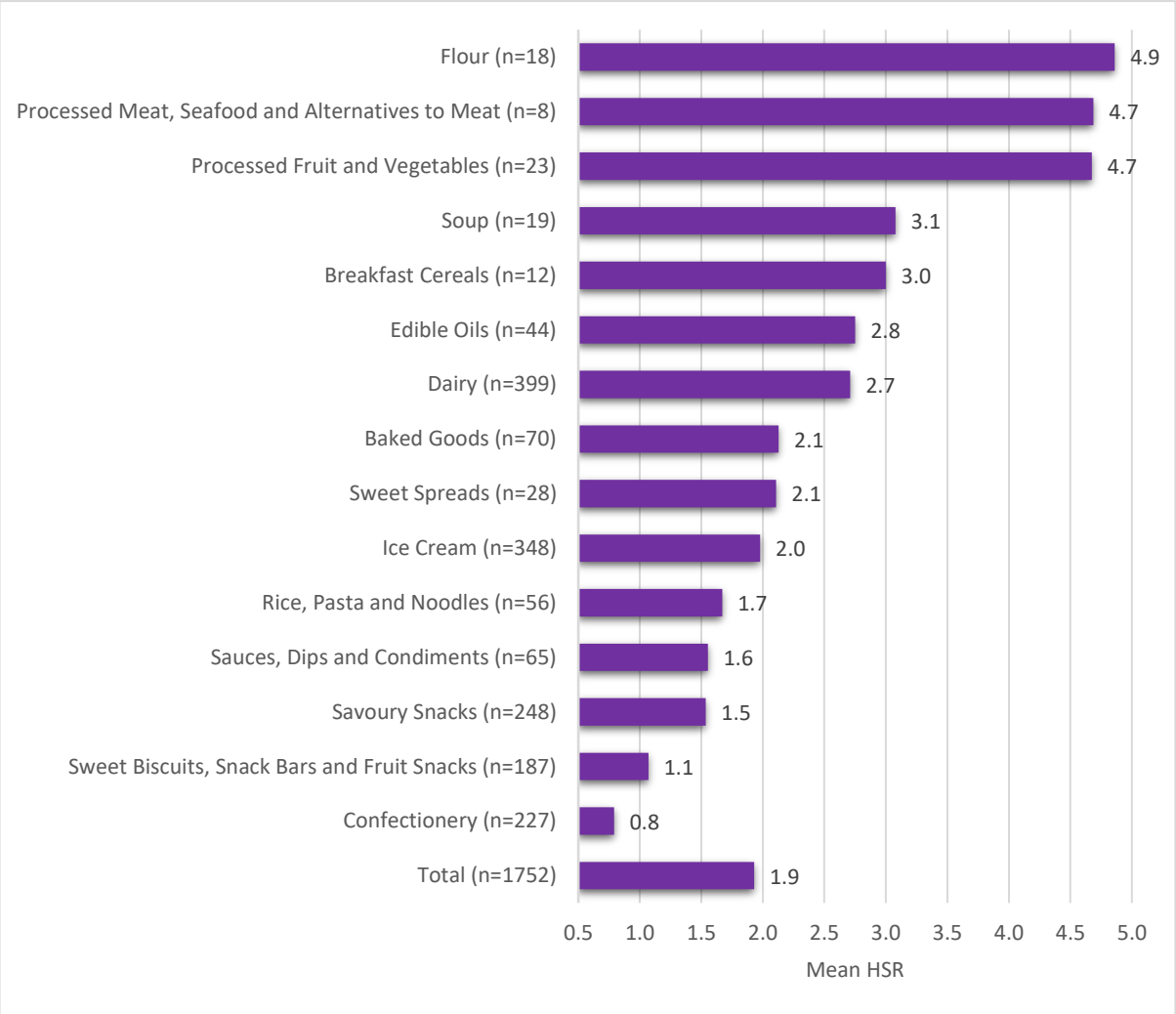
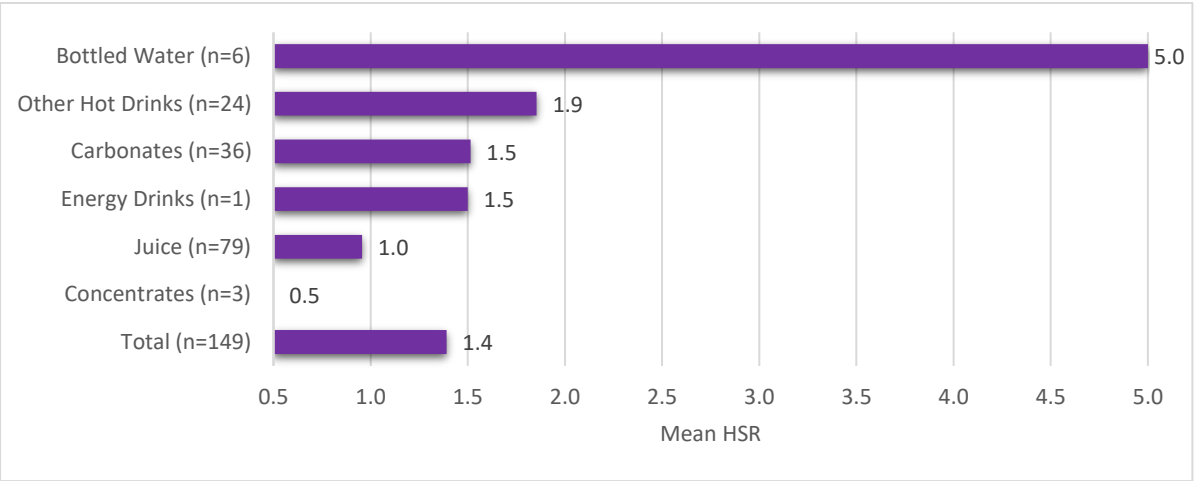


Figure 7 *Mean Health Star Rating by category - beverages*



The mean HSR for foods was higher at 1.9 than for beverages at 1.4. *Flour* and *Bottled Water* were the two categories that had the highest mean HSR (4.9 and 5.0 respectively). *Processed Meat, Seafood and Alternatives to Meat* and *Processed Fruit and Vegetables* were the only other categories to have a mean HSR that would be considered "healthy" (>=3.5). *Concentrates* had the lowest mean HSR (0.5) followed by *Confectionery* (0.8).

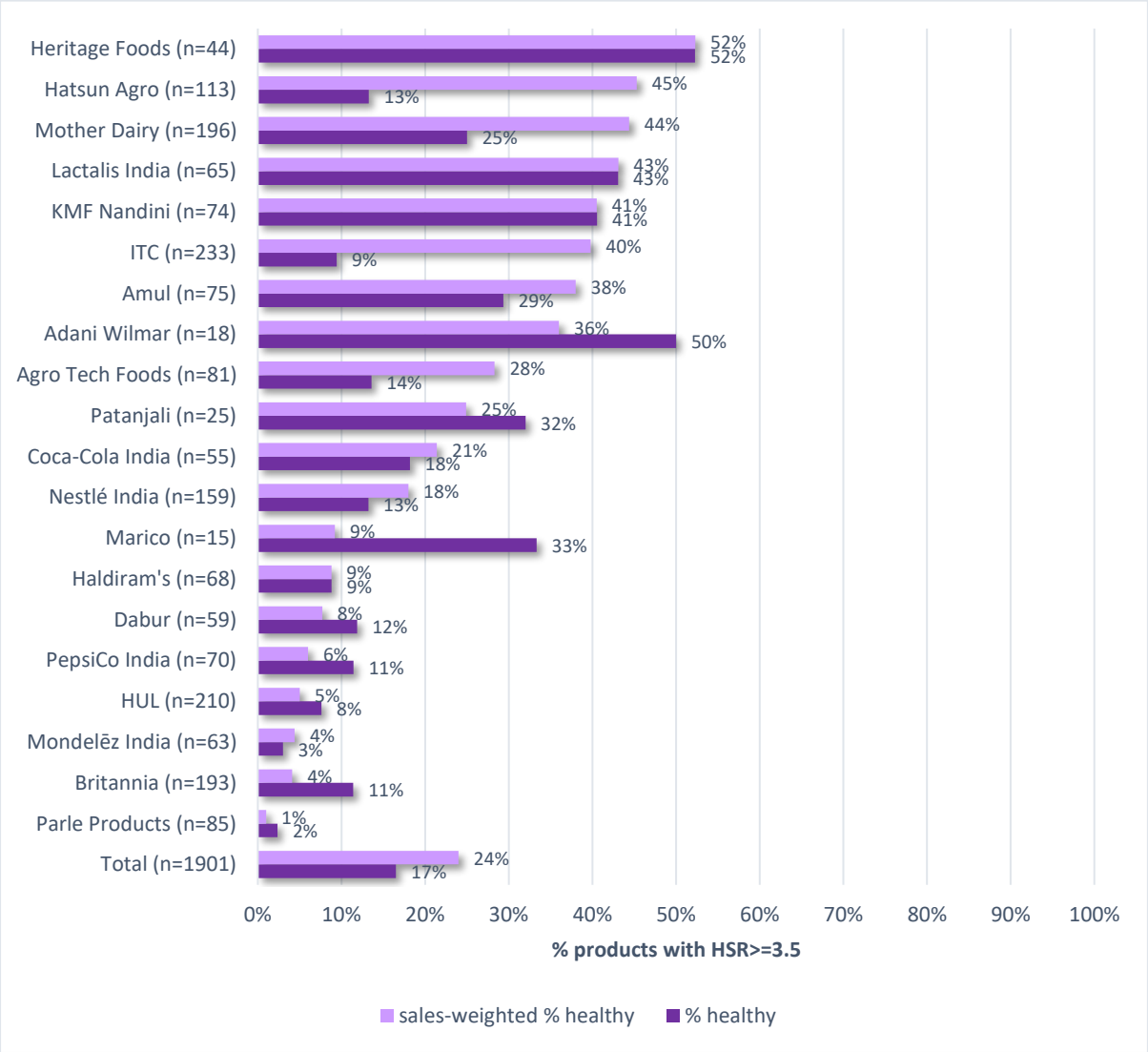
Table 7 Number of products with each Health Star Rating overall and by company

Star rating (HSR model): 3.5 stars or more = healthy product											
	0.5	1.0	1.5	2.0	2.5	3.0	3.5	4.0	4.5	5.0	Total
Adani Wilmar	1	3	3	1	1	0	7	0	0	2	18
Agro Tech Foods	5	9	26	18	6	6	5	1	3	2	81
Amul	13	5	2	17	5	11	5	3	8	6	75
Britannia	56	39	29	8	21	18	16	4	0	2	193
Coca-Cola India	38	3	2	1	1	0	4	0	0	6	55
Dabur	27	6	4	8	7	0	3	4	0	0	59
Haldiram's	6	4	15	18	16	3	5	1	0	0	68
Hatsun Agro	4	7	31	7	27	22	6	5	3	1	113
Heritage Foods	2	3	0	0	11	5	9	3	5	6	44
Hindustan Unilever	15	8	39	76	39	17	11	5	0	0	210
ITC	100	74	25	10	1	1	4	4	2	12	233
KMF Nandini	17	2	3	15	6	1	9	9	9	3	74
Lactalis India	10	7	1	2	4	13	8	10	6	4	65
Marico	0	1	2	3	4	0	0	0	0	5	15
Mondelēz India	44	8	5	4	0	0	1	1	0	0	63
Mother Dairy	10	19	61	23	24	11	8	5	15	20	196
Nestlé India	40	60	18	15	3	2	11	0	10	0	159
Parle Products	9	21	37	8	8	0	0	1	1	0	85
Patanjali	2	9	0	1	2	3	2	0	1	5	25
PepsiCo India	28	18	11	2	3	0	2	1	0	5	70
Total	**427**	**306**	**314**	**237**	**189**	**113**	**116**	**57**	**63**	**79**	**1901**
% of total products	**22.5%**	**16.1%**	**16.5%**	**12.5%**	**9.9%**	**5.9%**	**6.1%**	**3.0%**	**3.3%**	**4.2%**	**100.0%**

Table 7 above shows the spread of results achieved by all companies across the HSR spectrum.
The 20 companies assessed offered products with a range of HSRs but a large number scored poorly. Just over half (55.1%) of all products on the market scored 1.5 stars or below. The products that scored 3.5 and above totalled 315, accounting for only 16.6% of all products.

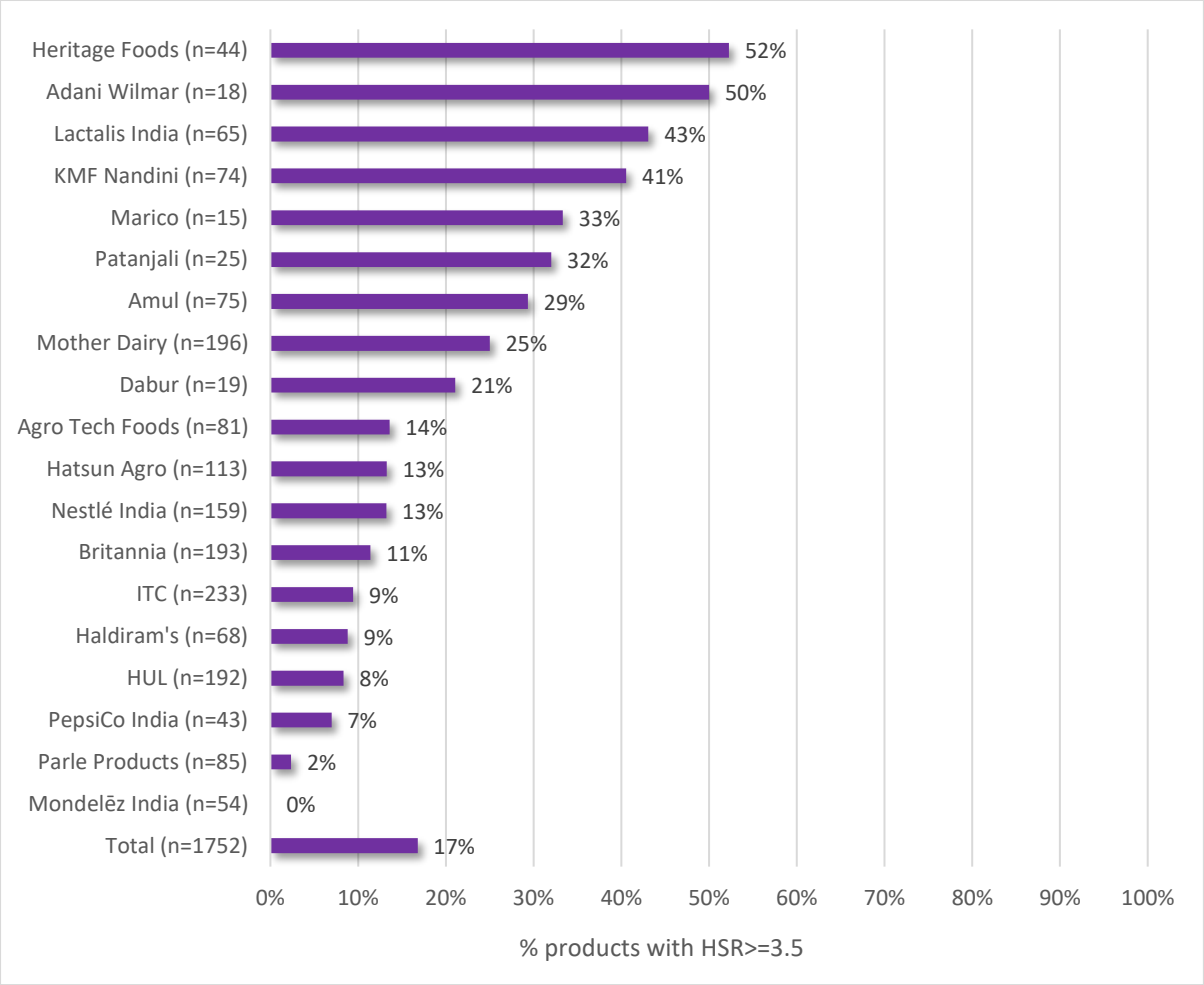
ANALYSIS 3 and 4 *Corporate rankings based upon proportion of 'healthy' products*

Figure 8 *Proportion of 'healthy' products and sales-weighted proportion of 'healthy' products by company - overall product portfolio (20 companies)*



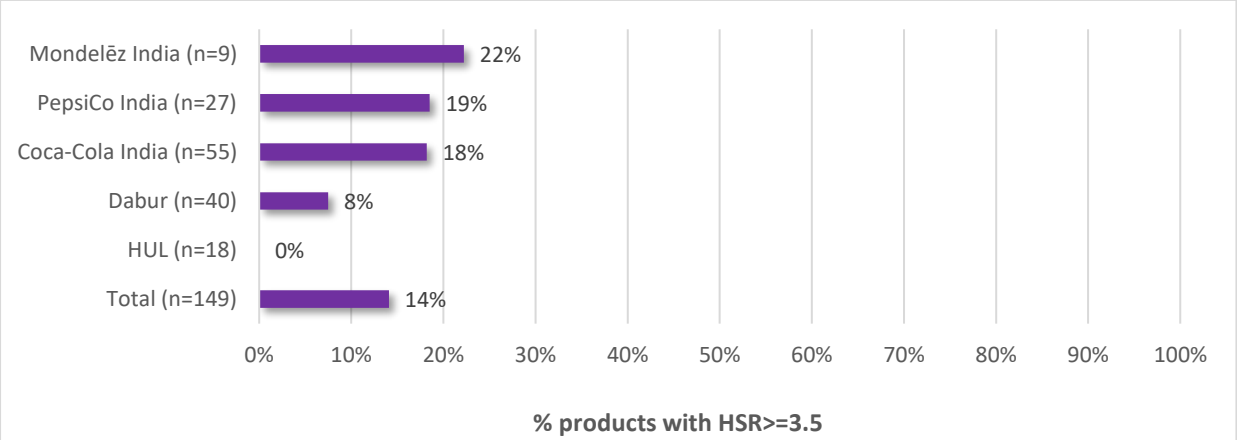
Only 17% of products from all manufacturers were classified as 'healthy', which rose to a proportion of 24% after sales-weighting. Heritage Foods had the largest proportion of its portfolio achieving a sales-weighted HSR of 3.5 or above (52%). Heritage Foods scored well due to its portfolio dominated by dairy products such as milks and yoghurts. Hatsun Agro was close behind with 45% of products receiving 3.5 HSR or above, although interestingly Hatsun Agro had a much lower proportion of unweighted products considered healthy, showing that its sales are primarily from healthier product categories (*Dairy* versus *Ice Cream*). Parle Products and Britannia had the lowest proportion of 'healthy' products: both predominantly make biscuits (cookies) that received low HSRs. Other notable changes in rankings of companies before and after sales-weighting included ITC, which ranked 16th before sales-weighting was considered yet jumped to 6th rank following sales-weighting, indicating that their healthier products accounted for a larger proportion of product sales. The opposite result was seen for Marico, which ranked 5th before sales-weighting was applied yet dropped to 13th following sales-weighting, indicating a higher proportion of its sales were attributable to less healthy products.

Figure 9 *Proportion of 'healthy' products by company - foods (19 companies)*



Results for foods were very similar to overall product portfolios for most companies. Heritage Foods was the only company with more than 50% of its portfolio of food products considered healthy.

Figure 10 *Proportion of 'healthy' products by company - beverages (5 companies)*



Very few beverages were considered 'healthy'. Mondelēz India ranked first, followed by PepsiCo India. The vast majority of all companies' beverages – sugar and artificially sweetened carbonated beverages, powder concentrates, energy drinks, juice drinks and hot beverages - received HSR results ≤2.0.

Figure 11 *Proportion of 'healthy' products by category - foods*

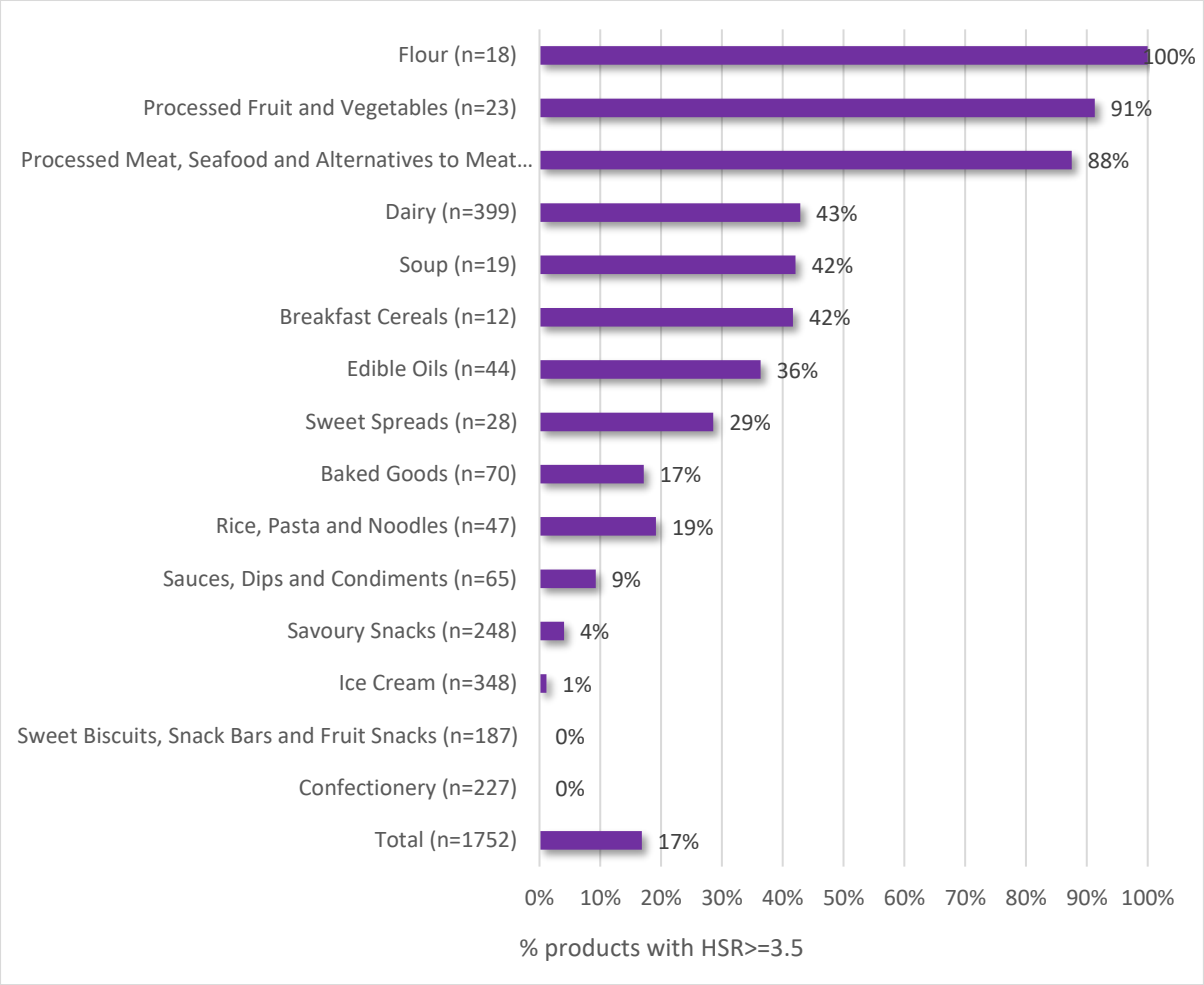
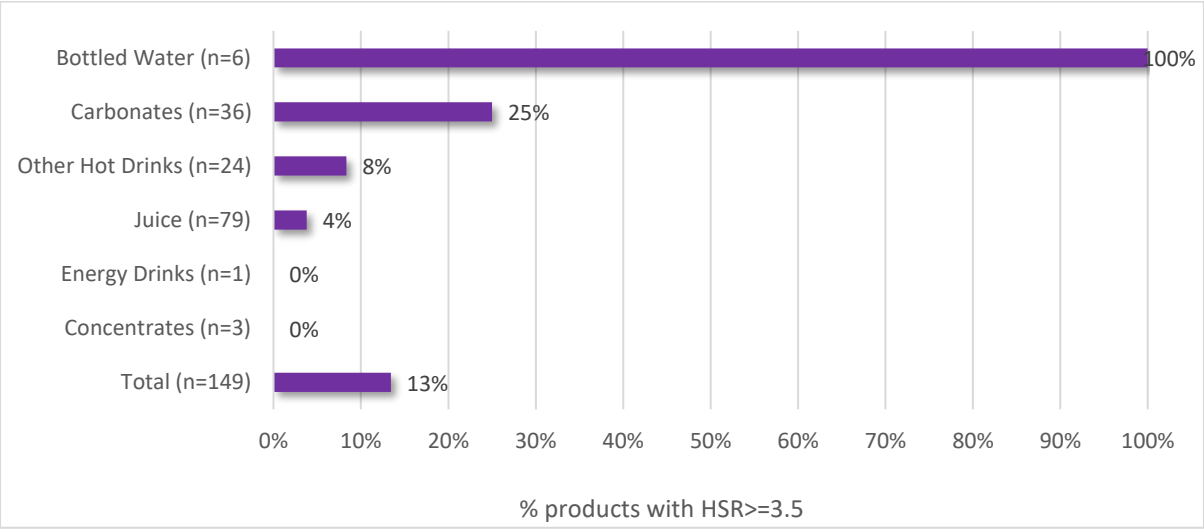


Figure 12 *Proportion of 'healthy' products by category – beverages*

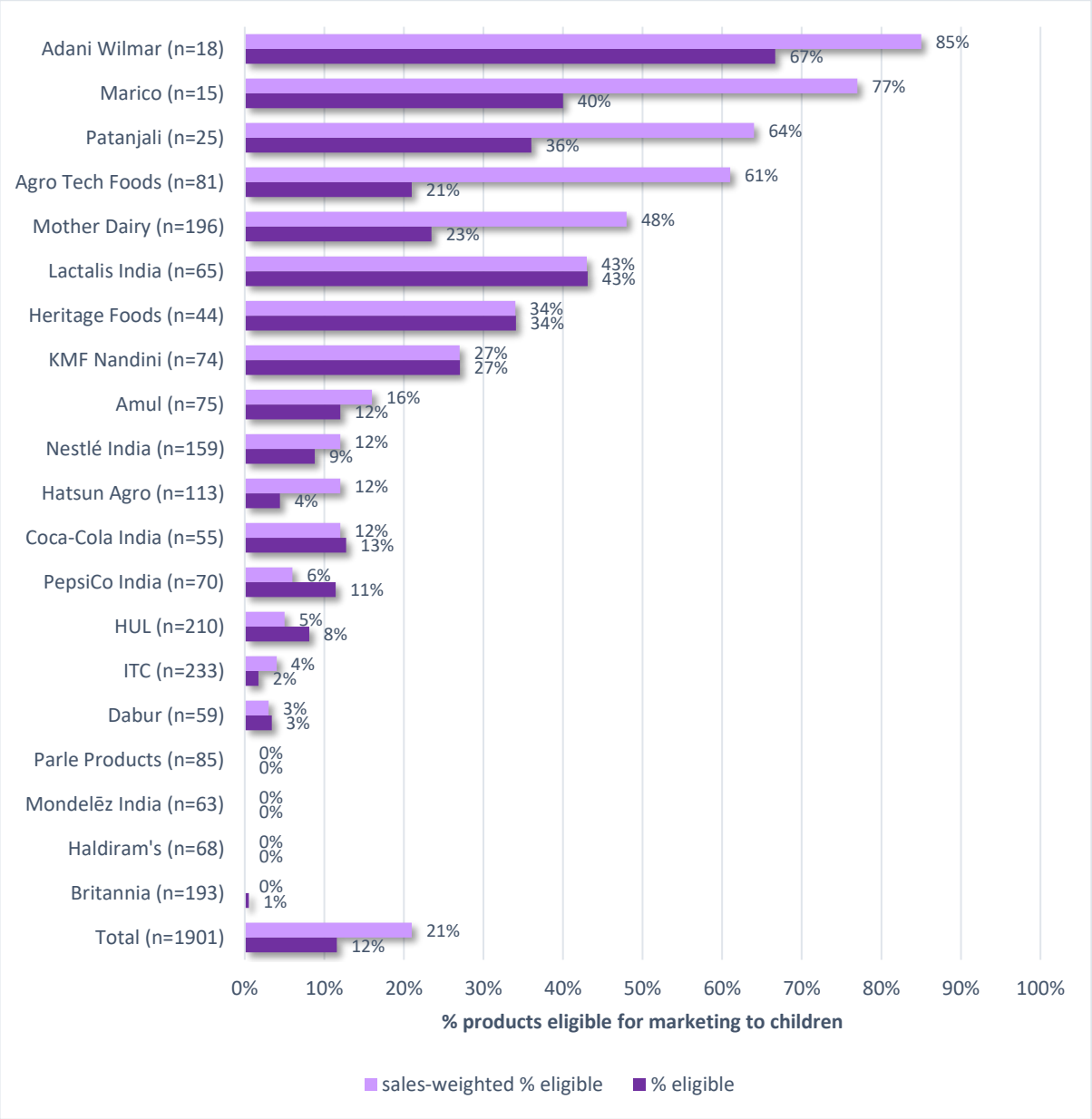


Similar results were seen to the mean HSR analysis, with *Flour*, *Processed Fruit and Vegetables* and *Bottled Water* having the largest proportion of "healthy" products (100%, 91% and 100%, respectively). Two food categories and two beverage categories had zero products that would considered "healthy" using this metric.

ANALYSIS 5 and 6 *Corporate ranking based upon proportions and sales-weighted proportions of products meeting WHO SEAR eligibility criteria*

Of the 1,901 products available for analysis, 1,901 had sufficient nutrient data to be assessed under the WHO SEAR nutrient profile model.

Figure 13 *Proportions of products meeting WHO SEAR eligibility criteria for marketing to children – overall product portfolio (20 companies)*



A low proportion of food products (12%) offered by the companies could be marketed to children using the WHO SEAR eligibility criteria, increasing to 21% following sales-weighting. Adani Wilmar and Marico ranked highest in terms of sales-weighted proportion of products eligible to be marketed to children. Mondelēz India, Parle Products, Haldiram's and Britannia had 0% of their sales-weighted portfolios eligible for marketing to children. Patanjali, although ranking low in mean HSR ranked much higher when using the WHO SEAR eligibility criteria. *Bottled Water, Edible Oils, Soup* and *Processed Fruit and Vegetables* had the highest proportion of eligible products.

Figure 14 *Proportions of products meeting WHO SEAR eligibility criteria for marketing to children – foods (19 companies)*

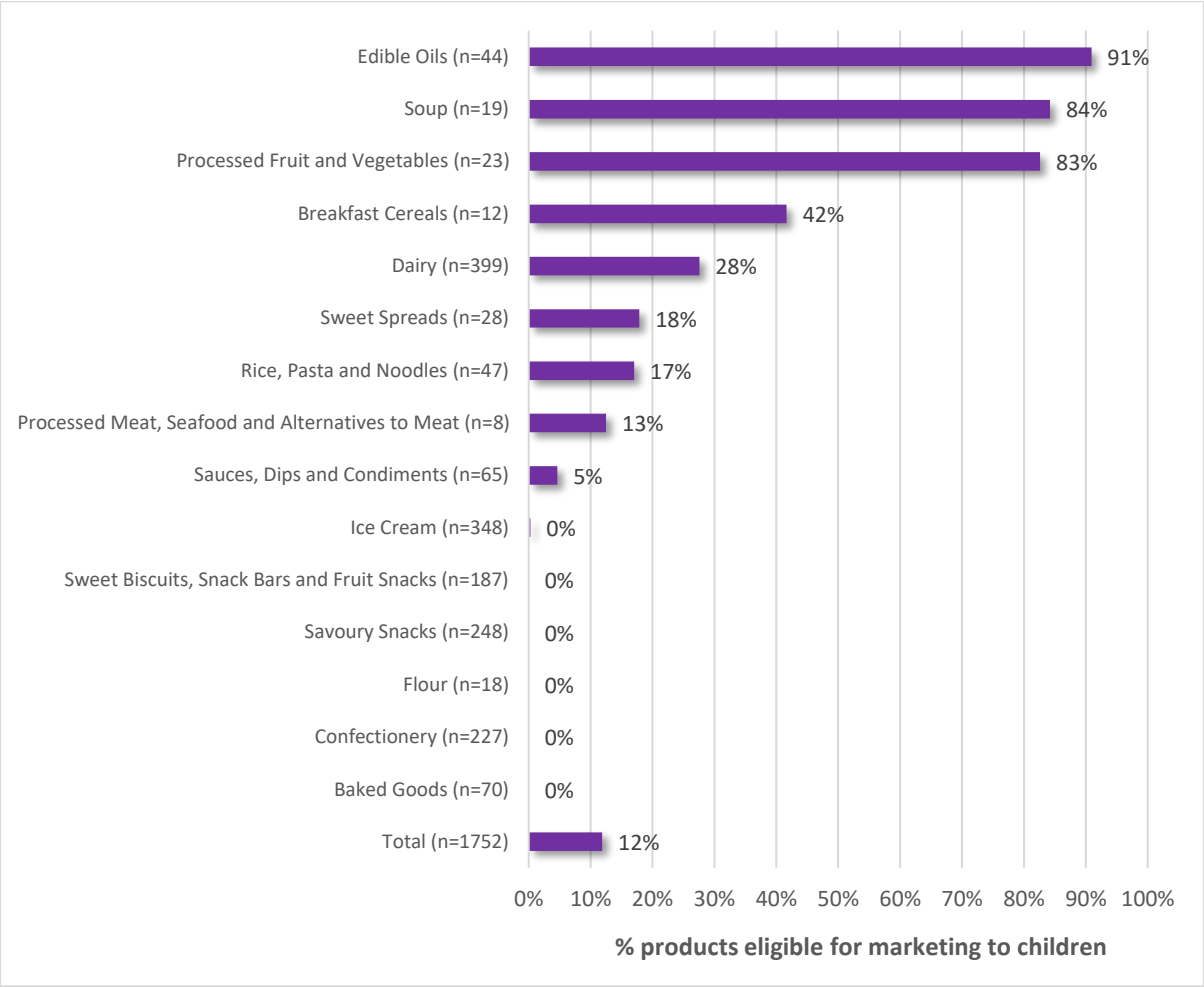
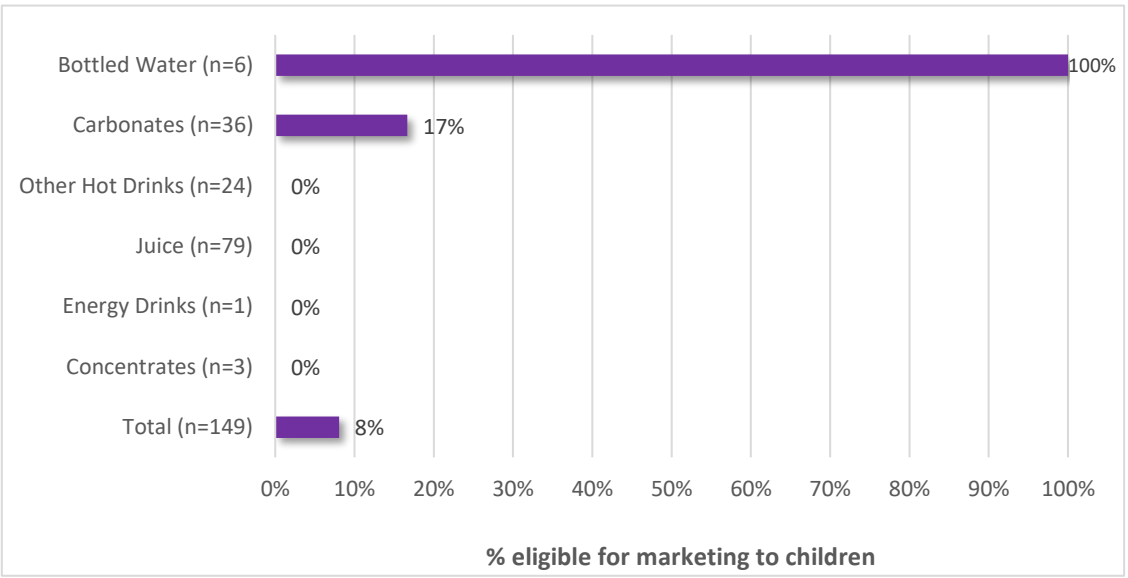


Figure 15 *Proportions of products meeting WHO SEAR eligibility criteria for marketing to children – beverages (5 companies)*



ANALYSIS 7 - Comparative nutritional quality of products in same subsets

Table 8 *Mean and range HSR of food products by EMI subsets*

	EMI subset	Mean HSR	Range HSR
FOODS	**Baked Goods**	2.1	0.5 to 4.0
	Breakfast Cereal	3.0	1.0 to 5.0
	Confectionery	0.8	0.5 to 2.0
	Dairy	2.7	0.5 to 5.0
	Edible Oils	2.8	1.0 to 4.5
	Flour	4.9	4.0 to 5.0
	Ice Cream	2.0	0.5 to 4.0
	Processed Fruit and Vegetables	4.7	2.0 to 5.0
	Processed Meat, Seafood and Alternatives to Meat	4.7	2.5 to 5.0
	Rice, Pasta and Noodles	1.7	0.5 to 4.5
	Sauces, Dips and Condiments	1.6	0.5 to 4.0
	Savoury Snacks	1.5	0.5 to 4.5
	Soup	3.1	0.5 to 3.5
	Sweet Biscuits, Snack Bars and Fruit Snacks	1.1	0.5 to 2.5
	Sweet Spreads	2.1	0.5 to 5.0
	Total	1.9	0.5 to 5.0

Table 9 *Mean and range HSR of beverage products by EMI subsets*

	EMI subset	Mean HSR	Range HSR
BEVERAGES	**Bottled Water**	5.0	5.0 to 5.0
	Carbonates	1.5	0.5 to 5.0
	Concentrates	0.5	0.5 to 0.5
	Energy Drinks	1.5	1.5 to 1.5
	Juice	1.0	0.5 to 4.0
	Other Hot Drinks	1.9	1.0 to 4.0
	Total	1.4	0.5 to 5.0

As with results by company, the large range in HSR within some subsets such as *Sweet Spreads* and *Savoury Snacks* suggests that healthier formulations of these products can be made.

CONCLUSIONS AND INTERPRETATION

Key findings

Mean healthiness of products

- The overall sales-weighted mean healthiness of companies' products was 2.0 out of 5.0 and the mean sales-weighted healthiness of product portfolios varied substantially between companies (0.9 for Mondelēz India to 3.2 for Heritage Foods). Differences in mean healthiness between companies reflected primarily differences in product mix but also to a lesser extent differences in the healthiness of products within the same categories. Companies such as Mondelēz India and Parle Products, which make primarily products such as confectionery and sweet biscuits, generally scored poorly in each metric examined, whereas companies that sold primarily edible oil products such as Marico, and dairy products such as Heritage Foods and Mother Dairy, generally scored and ranked better.
- Estimates of the comparative healthiness of product portfolios weighted by sales changed some rankings and generally increased the disparities between companies. Some companies derived quite different proportions of their sales from healthy versus unhealthy products. For example, eight companies' rankings decreased when sales-weighting of results was applied, indicating that a larger proportion of these companies' product sales were due to less healthy products. On the other hand, seven companies' rankings increased following sales-weighting, indicating that a larger proportion of their portfolio's sales were due to healthier products. Robust sales-weighted estimates will provide the best idea of the impact of a company's products on consumer health.
- Rankings of companies also varied depending upon whether the comparison was based upon all products, foods alone or beverages alone reflecting the importance of product mix in determining the average healthiness of the product portfolio.

Proportions of products defined as healthy

- Less than a quarter of companies' products (sales-weighted) were defined as healthy (24%). The proportion of products defined as healthy varied greatly between companies (1% for Parle Products to 52% for Heritage Foods). Similar to results for overall mean healthiness, companies with portfolios dominated by products such as confectionery (e.g. Mondelēz India) and sweet biscuits (e.g. Parle Products) scored poorly using this metric and those with portfolios dominated by dairy products (e.g. Mother Dairy) scored better.
- Assessing the overall proportion of healthy products across all companies, the sales-weighted proportion of products with an HSR of 3.5 or above (24%) was higher than the unweighted proportion of products (17%). This can be attributed to companies that derive large revenues from a small number of healthy products, such as those selling edible oil products (Adani Wilmar), or dairy products (Amul). Estimates of the proportion of product portfolios considered "healthy" using the HSR weighted by sales changed some rankings quite dramatically.

Proportions of products eligible for marketing to children

- The proportion of products eligible for marketing to children was low (12%), and lower than the proportion of products defined as 'healthy' using the HSR cut point (17%). Three companies (Mondelēz India, Parle Products and Haldiram's) had no products eligible for marketing to children according to the WHO SEAR criteria. Similar to the sales-weighted proportion of products defined as 'healthy', the sales-weighted proportion of products eligible for marketing to children (21%) was higher than the unweighted proportion of products (12%). Overall, company rankings did not change dramatically when sales-weighting was applied using the WHO SEAR criteria.

Methodological limitations

The results of this research should be considered in relation to the following limitations:

The limited nutrition data available. The data available were in part insufficient to evaluate the nutritional value of the products because they are based on a larger number of nutrients than current Indian regulations require to be listed on packs. The problem was addressed by using proxy data unless several data points were missing. Of note, no alternative nutrient profiling model has been identified that would make better use of the limited data available. The most likely impact of using proxy nutrient values is underestimation of the real differences between products, and correspondingly, therefore, underestimation of the real differences between companies.

The absence of a complete list of all marketed products. Listings of all products sold in India and their nutritional content were sought from the 20 companies but not all companies included in analysis provided them. The solution was to compile listings based upon data extracted from the FoodSwitch India database as well as the dataset used in the *2020 India Product Profile*. It seems unlikely that incomplete data collection has resulted in significant biases in the results.

Restriction of the analysis to 20 large companies. The assessment of 20 manufacturers operating in India was a pragmatic compromise designed to ensure feasibility and meaningful comparisons based upon the average nutritional composition of the majority of products made by each company. This strategy will not have affected the primary conclusions of the project about the relative nutritional quality of the products provided by the included companies but how the included companies compare to other smaller companies, artisanal/street food providers, quick service restaurants or home-cooked meals is unknown.

Limitations of the nutrient profiling tools. While the HSR is based upon extensive research and validation, there is continuing discussion of how the algorithm operates for some food categories. Those fruit juices that are '100% fruit juices', for example, are able to receive high HSRs despite being high in fruit sugar because they receive positive points for fruit content. The HSR (and most other nutrient profile models) also does not consider the level of processing a product has gone through.

Differences in rankings. The different methods of nutritional assessment of the product portfolio (mean HSR, proportion HSR≥3.5 and proportion eligible for marketing to children) did not consistently identify the same companies as being top-ranked (Appendix C). As such, the various profiling methods proved an effective way to discriminate between companies based upon the healthiness of products but did not give consistent findings. This is unsurprising given the different elements that contribute to each method and the similar mean scores of several companies for some measures. This latter observation means that there is the potential for changes in the scores of just a few products to switch around the positions of companies in the rankings. Overall, Heritage Foods, Mother Dairy and Lactalis India ranked highest and Mondelēz India, Parle Products and Britannia ranked lowest.

No consideration of serving size. Overweight and obesity can be influenced by the quantity of food people choose to consume at one sitting. This may be the case particularly for products provided in packages eaten at a single sitting. The association between serving size and portion size for products provided in packages that contain multiple servings is also not always strong. It has been argued that nutrient profiling models should include consideration of serving size but the absence of agreed national and international standards has meant that this has not proved possible to date.

Limited granularity of sales data. The sales data accessible from Euromonitor International are provided by category not by individual product. This limits the capacity to obtain robust sales-weighted estimates because it is not possible to precisely match a sales figure to an HSR value. In this project, erroneous results may have been generated because it is unlikely that sales volumes of every item sold by a company within a given category were the same. So, while the process should give a reasonable sales-weighted estimate of the mean healthiness of products, it is imperfect. Another consideration is that only the top five categories were included for each of the 20 companies. For most companies this would not have affected results as most do not sell products in more than categories. However, for a small few this may have altered their overall healthiness calculation.

APPENDIX A – EMI subsets mapped to HSR Categories

The following table is provided to assist interpretation of results where products are categorised differently for the purpose of generating a nutrient profile outcome under the Health Star Rating to how these results are displayed in the analysis in this report.

Table 10 *Euromonitor food and beverage subsets mapped to Health Star Rating Categories*

1. Non-dairy beverage	1D. Dairy Beverage	2. Non-Dairy Foods	2D. Dairy foods	3. Oils and spreads	3D. Cheese
Beverages	**Foods**				
Carbonates Energy Drinks Other Hot Drinks Juices Concentrates Bottled Water	Dairy (drinking milks only)	Baked Goods Breakfast Cereals Confectionery Flour Ice Cream Processed Fruits and Vegetables Processed Meat, Seafood and Alternatives to Meat Rice, Pasta and Noodles Savoury Snacks Soup Sweet Spreads Sweet Biscuits, Snack Bars and Fruit Snacks Sauces, Dips and Condiments	Dairy (including cheese products not in category 3D)*	Edible Oils	Dairy (high calcium cheese products)**

* Custards, desserts, cream cheese, ice-cream and cream are not considered as dairy foods but are classified as Category 2 foods for the purpose of HSR. For further explanation see the HSR Guide for Industry http://healthstarrating.gov.au/internet/healthstarrating/publishing.nsf/Content/guide-for-industry-document

** Defined for the purposes of HSR as cheeses with calcium content ≥320mg/100g

APPENDIX B – Results by category for each company

Table 11 Summary results by category for each company (20 companies)

Adani Wilmar					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Edible Oils	9	2.1	1.0 – 3.5	33%	89%
Flour	1	5.0	5.0 – 5.0	100%	0%
Processed Meat, Seafood and Alternatives to Meat	1	5.0	5.0 – 5.0	100%	0%
Rice, Pasta and Noodles	7	2.5	0.5 – 3.5	57%	57%
Total	**18**	**2.6 (*2.2)**	**0.5 – 5.0**	**50% (*36%)**	**67% (*85%)**
Agro Tech Foods					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Edible Oils	12	3.0	2.0 – 3.5	42%	100%
Savoury Snacks	57	1.7	0.5 – 3.0	0%	0%
Sweet Spreads	12	2.9	0.5 – 5.0	50%	42%
Total	**81**	**2.0 (*2.6)**	**0.5 – 5.0**	**14% (*28%)**	**21% (*61%)**
Amul					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Dairy	55	2.7	0.5 – 5.0	40%	17%
Ice Cream	20	1.9	1.0 – 3.0	0%	0%
Total	**75**	**2.5 (*2.7)**	**0.5 – 5.0**	**29% (*38%)**	**12% (*16%)**

Britannia					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Baked Goods	70	2.1	0.5 – 4.0	17%	0%
Dairy	37	2.3	0.5 – 5.0	27%	3%
Savoury Snacks	10	0.5	0.5 – 0.5	0%	0%
Sweet Biscuits, Snack Bars and Fruit Snacks	76	1.0	0.5 – 2.5	0%	0%
Total	**193**	**1.6 (*1.2)**	**0.5 – 5.0**	**11% (*4%)**	**1% (*0%)**
Coca-Cola India					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Bottled Water	6	5.0	5.0 – 5.0	100%	100%
Carbonates	23	1.2	0.5 – 3.5	17%	4%
Juice	26	0.6	0.5 – 2.5	0%	0%
Total	**55**	**1.3 (*1.4)**	**0.5 – 5.0**	**18% (*21%)**	**13% (*12%)**
Dabur					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Juice	40	1.2	0.5 – 4.0	8%	0%
Sauces, Dips and Condiments	15	2.2	0.5 – 4.0	27%	29%
Sweet Spreads	4	1.0	1.0 – 1.0	0%	0%
Total	**59**	**1.4 (*1.3)**	**0.5 – 4.0**	**12% (*8%)**	**4% (*3%)**
Haldiram's					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Savoury Snacks	68	2.0	0.5 – 4.0	9%	0%
Total	**68**	**2.0 (*2.0)**	**0.5 – 4.0**	**9% (*9%)**	**0% (*0%)**

Hatsun Agro					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Dairy	29	2.7	0.5 – 5.0	52%	14%
Ice Cream	84	2.2	1.0 – 3.0	0%	1%
Total	**113**	**2.3 (*2.6)**	**0.5 – 5.0**	**13% (*45%)**	**4% (*12%)**
Heritage Foods					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Dairy	44	3.2	0.5 – 5.0	52%	34%
Total	**44**	**3.2 (*3.2)**	**0.5 – 5.0**	**52% (*52%)**	**34% (*34%)**
Hindustan Unilever					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Ice Cream	140	2.1	0.5 – 4.0	3%	0%
Other Hot Drinks	18	1.7	1.5 – 2.0	0%	0%
Sauces, Dips and Condiments	26	1.3	0.5 – 4.0	8%	4%
Soup	19	3.1	0.5 – 3.5	42%	84%
Sweet Spreads	7	2.2	1.5 – 4.0	29%	0%
Total	**210**	**2.1 (*1.8)**	**0.5 – 4.0**	**8% (*5%)**	**8% (*5%)**
ITC					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Confectionery	100	0.7	0.5 – 2.0	0%	0%
Flour	15	4.8	4.0 --5.0	100%	0%
Rice, Pasta and Noodles	12	2.0	0.5 – 4.5	42%	33%
Savoury Snacks	46	1.2	0.5 – 3.5	4%	0%
Sweet Biscuits, Snack Bars and Fruit Snacks	60	1.0	0.5 – 2.0	0%	0%
Total	**233**	**1.2 (*2.4)**	**0.5 – 5.0**	**9% (*40%)**	**2% (*4%)**

KMF Nandini					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Dairy	74	2.5	0.5 – 5.0	41%	27%
Total	**74**	**2.5 (*2.5)**	**0.5 – 5.0**	**41% (*41%)**	**27% (*27%)**
Lactalis India					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Dairy	65	2.8	0.5 – 5.0	43%	43%
Total	**65**	**2.8 (*2.8)**	**0.5 – 5.0**	**43% (*43%)**	**43% (*43%)**
Marico					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Breakfast Cereals	8	2.6	1.0 – 5.0	25%	25%
Edible Oils	3	2.3	2.0 – 2.5	0%	100%
Processed Meat, Seafood and Alternatives to Meat	4	4.4	2.5 – 5.0	75%	25%
Total	**15**	**3.0 (*2.4)**	**1.0 – 5.0**	**33% (*9%)**	**40% (*78%)**
Mondelēz India					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Concentrates	3	0.5	0.5 – 0.5	0%	0%
Confectionery	43	0.7	0.5 – 2.0	0%	0%
Other Hot Drinks	6	2.3	1.0 - 4.0	33%	0%
Sweet Biscuits, Snack Bars and Fruit Snacks	11	0.8	0.5 - 1.5	0%	0%
Total	**63**	**0.8 (*0.9)**	**0.5 - 4.0**	**3% (*4%)**	**0% (*0%)**

Mother Dairy					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Dairy	61	2.6	0.5 – 4.5	36%	31%
Edible Oils	8	3.6	2.0 - 4.5	63%	100%
Ice Cream	104	1.7	0.5 - 3.0	0%	0%
Processed Fruit and Vegetables	23	4.7	2.0 - 5.0	91%	83%
Total	**196**	**2.4 (*2.9)**	**0.5 - 5.0**	**25% (*44%)**	**23% (*48%)**
Nestlé India					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Confectionery	67	0.9	0.5 – 1.5	0%	0%
Dairy	31	3.0	0.5 - 4.5	68%	45%
Rice, Pasta and Noodles	37	1.4	0.5 - 3.0	0%	0%
Sauces, Dips and Condiments	24	1.4	0.5 - 2.0	0%	0%
Total	**159**	**1.5 (*1.7)**	**0.5 - 4.5**	**13% (*18%)**	**9% (*12%)**
Parle Products					
EMI subset	**No. products**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Confectionery	17	1.1	0.5 – 1.5	0%	0%
Savoury Snacks	28	1.8	0.5 – 4.5	7%	0%
Sweet Biscuits, Snack Bars and Fruit Snacks	40	1.4	0.5 – 2.5	0%	0%
Total	**85**	**1.5 (*1.4)**	**0.5 – 4.5**	**2% (*1%)**	**0% (*0%)**

Patanjali					
EMI subset	**No. products HSR**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Dairy	3	0.7	0.5 – 1.0	0%	0%
Edible Oils	12	2.5	1.0 – 4.5	25%	75%
Flour	2	5.0	5.0 – 5.0	100%	0%
Processed Meat, Seafood and Alternatives to Meat	3	5.0	5.0 – 5.0	100%	0%
Sweet Spreads	5	1.0	1.0 – 1.0	0%	0%
Total	**25**	**2.5 (*2.4)**	**0.5 – 5.0**	**32% (*25%)**	**36% (64%)**
PepsiCo India					
EMI subset	**No. products HSR**	**Mean HSR (*sales weighted HSR)**	**HSR range**	**%>=3.5 HSR (*sales-weighted)**	**% eligible under WHO (* sales-weighted)**
Breakfast Cereals	4	3.9	1.5 - 5.0	75%	75%
Carbonates	13	2.0	0.5 - 5.0	38%	38%
Energy Drinks	1	1.5	1.5	0%	0%
Juice	13	1.0	0.5 – 2.5	0%	0%
Savoury Snacks	39	1.0	0.5 – 2.0	0%	0%
Total	**70**	**1.4 (*1.2)**	**0.5 - 5.0**	**11% (*6%)**	**11% (*6%)**

APPENDIX C - Comparative rankings of companies based upon the different evaluation methods

Table 12 *Ranking of companies based upon overall product portfolio (20 companies)*

	Sales weighted mean HSR	Sales from healthy products	Sales from products meeting WHO SEAR criteria	Overall rank
Adani Wilmar	11	8	1	6
Agro Tech Foods	6	9	4	4
Amul	4	7	9	7
Britannia	18	19	17	18
Coca-Cola India	16	11	10	12
Dabur	17	15	16	16
Haldiram's	12	14	18	14
Hatsun Agro	5	2	12	5
Heritage Foods	1	1	7	1
Hindustan Unilever	13	17	14	15
ITC	9	6	15	11
KMF Nandini	7	5	8	8
Lactalis India	3	4	6	3
Marico	8	13	2	9
Mondelēz India	20	18	19	20
Mother Dairy	2	3	5	2
Nestlé India	14	12	11	13
Parle Products	15	20	20	19
Patanjali	10	10	3	10
PepsiCo India	19	16	13	17

The table above demonstrates the comparative ranking of companies across the different analysis methods used. Heritage Foods, Mother Dairy and Lactalis India ranked highest and Mondelēz India, Parle Products and Britannia ranked lowest.