

ACCESS TO NUTRITION INDEX

INDIA PRODUCT PROFILE 2016



ACCESS TO
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This India Spotlight Index was produced by the ATNF team which consists of Inge Kauer, Marije Boomsma and Simona Kramer along with Senior Advisor Rachel Crossley. The team also drafted this report.

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The George Institute, health and medical research institute, conducted the Product Profile assessment in India for the Access to Nutrition Foundation. The George Institute team consisted of Dr Elizabeth Dunford, Alexandra Jones, Dr Bruce Neal, Thout Sudhir Raj and Fraser Taylor with advice of Professor Mike Rayner at Oxford University.

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INDIA SPOTLIGHT INDEX 2016

December 2016

Preface

I am very pleased to introduce the first edition of the India Spotlight Index. This is a groundbreaking publication. It provides the first fully independent national assessment of the contribution by India's largest food and beverage (F&B) manufacturers to better health outcomes through good nutrition.

The double burden of malnutrition poses daunting challenges for India: it has both a large undernourished population with the highest number of stunted children in the world – 48 million under the age of 5 are wasted – and a growing pandemic of overweight and obese people suffering from chronic diet-related diseases such as diabetes. Today, the prevalence of overweight and obese children and adolescents between 5 and 19 stands at a staggering 22%. Given the growth in consumption of packaged foods in India and increasing demand in urban areas for healthy food, the nation's F&B manufacturers have the potential to play a pivotal role in tackling the double burden of malnutrition.

Of the 10 largest F&B manufacturers in the country, seven engaged fully in the research for the Index, suggesting widespread awareness of this potential. These seven companies shared confidential data with the Access to Nutrition Foundation (ATNF) in addition to the information they publish.

The 2016 Index reflects extensive consultations conducted between 2013 and 2016. It furnishes a comprehensive and objective assessment of India's major F&B manufacturers' nutrition and undernutrition-related policies and practices in nutrition governance, product formulation, accessibility, marketing, lifestyles, labeling and stakeholder engagement. The Index identifies and highlights a number of best practices that all companies can learn from. It also presents an in-depth analysis of the nutritional quality of the products these companies sell based on the Health Star Rating system. Moreover, the critical importance of advancing and protecting breastfeeding in India is addressed by assessing compliance with India's IMS Act and the International Code of Marketing of Breast-milk Substitutes.

A principal conclusion of our extensive research is that F&B manufacturers in India are falling far short of what they need to do if they are to fulfil their potential in helping to fight the mounting double burden of malnutrition in India. There are also, however, some positive signs: ATNF has identified many good nutrition practices that could be adopted across the industry and several valuable initiatives run by NGOs.

The Government of India, too, has taken important steps towards better nutrition – by, for instance, strengthened food labeling regulations, technical standards for fortification and by having adopted and successfully enforced strong regulations with respect to breast-milk substitute marketing.

To what extent will India's F&B industry rise to the challenge of confronting the double burden of malnutrition? The potential for the industry to be a central actor in meeting the challenge is self-evident. I hope when we publish the second India Spotlight Index in 2018 we will be able to show that the industry has made great strides to address this most critical issue.

I would like to thank the Bill & Melinda Gates Foundation, the Children's Investment Fund Foundation and the Wellcome Trust for supporting ATNF's work. I would also like to thank the members of the Access to Nutrition Foundation Board, the Independent Advisory Panel and the Expert Group, and many Indian experts, our research partners Sustainalytics, Westat and The George Institute, and the ATNF team for their enormous efforts and support in producing the first India Spotlight Index.

Inge Kauer
Executive Director Access to Nutrition Foundation





Product Profile

A comprehensive assessment of the nutritional quality of packaged foods in India.

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In order to build a full picture of the contribution that India's packaged food industry is making to address the country's mounting health challenges related to obesity, overweight and diet-related chronic diseases, it is essential to complement the Corporate Profile with an assessment of the nutritional quality of the products that food and beverage manufacturers sell.

The Product Profile is designed to provide such an assessment. It is intended primarily to stimulate action by companies to improve the nutritional quality of the products they sell and to encourage them to expand their portfolios by developing new healthier options. It is also hoped that the results will contribute to the national dialogue on combatting obesity and diet-related diseases.

Even though packaged foods are estimated to make up only 6% of consumer spending on food in India currently¹, economists expect that as incomes in India grow, consumers will follow the typical patterns seen in other parts of the world as countries develop and buy more packaged foods and beverages. It is, therefore, essential that all manufacturers of these products take steps to limit levels of fats, particularly saturated fat, salt and added sugar and to maximize levels of fruit, vegetables, legumes, wholegrains, fiber and vitamins and minerals.

ATNF piloted product profiling in 2012 in Mexico, South Africa and India, working with a team led by Professor Mike Rayner at the University of Oxford (who is a member of the ATNF Expert Group).² Building on that experience, and feedback from stakeholders, ATNF commissioned The George Institute for Global Health (TGI) to undertake this first-ever Product Profile study for India.

This Product Profile study had two primary objectives:

1. To assess the nutritional quality of the packaged food and beverage products made by the largest manufacturers in India, and the relative sales of more and less healthy products.
2. To assess the level of compliance of product labels with Indian nutrition content labeling regulations and Codex nutrition labeling guidelines.

A secondary objective was to explore whether it is possible to analyse the relative pricing of healthy and less healthy products, particularly to determine whether healthy products are more expensive than less healthy options.

Note that the results of the labeling analysis are incorporated into companies' scores in Category F of the Corporate Profile. Further, this analysis is not designed for and does not include, an assessment of whether products have been fortified appropriately to address specific micronutrient deficiencies, as the nutrient profile models used in this Product Profile study were not designed for this purpose.

Approach to research: summary

The following is a summary of the methodology used for the Product Profile. The full explanation is available in TGI's report.

Research partner and advisor: In mid-2016, ATNF commissioned the Food Policy Division of The George Institute for Global Health (TGI), based at the University of Sydney, to undertake this Product Profile for India. TGI was selected because of its established presence in India with offices in Hyderabad, Bangalore and New Delhi, and because it has an extensive database containing food composition data for over 10,000 products in India. Professor Mike Rayner advised the research team.

Companies assessed: A total of 12 food and beverage manufacturers were initially selected for inclusion in the TGI study: the ten companies initially included in the India Spotlight Index, plus the next two largest with diverse product portfolios – Karnataka Cooperative Milk Producers' Federation (which markets its products under the brand name Nandini) and ITC. They were included to give a wider picture of products available to consumers in India. However, because Nandini and ITC are not constituents of the Index, their results are not included here but can be found in the TGI report. Further, during the data collection phase, TGI found very few Ruchi Soya products and only one of those could be assessed due to the lack of nutritional data on the pack. Thus, Ruchi Soya was excluded from the analysis.

How products' nutritional quality was determined: Two nutrient profiling systems were selected that met the qualitative criteria developed by ATNF's Expert Group and based on those used to catalogue existing NPSs by WHO³.

The criteria were that the systems must: be developed with appropriate stakeholder consultation; cover the majority of categories of processed food and beverage products; take account of both positive and negative nutrients; not be designed solely to address school foods, given requirement to assess foods on the general market; well-validated with results published in the peer-reviewed literature demonstrating that the models produce internally consistent classifications of 'healthy' and 'unhealthy' foods, consistent with general nutrition principles; enable differentiation of nutritional quality within and between categories; have an algorithm in the public domain so as to be able to access and apply it; able to generate meaningful results in the Indian context.

The Australian Health Star Rating nutrient profiling system was used to determine how healthy each product is. Products are rated between 0.5 stars (least healthy) to 5 stars (most healthy). The WHO Regional Office for Europe Nutrient Profile Model (WHO EURO) was used to identify which products are suitable to be marketed to children.

Food and beverage products included in the study: Products eligible for inclusion were defined as 'all packaged foods and non-alcoholic beverages manufactured by the included companies available for purchase in India.' However, several types of product were excluded from the analysis: unprocessed meat, poultry, fish and raw agricultural commodities (e.g. fresh vegetables, grains); plain tea and coffee, and condiments such as herbs, vinegars and spices because nutrient profiling is not appropriate for these single ingredient foods; infant formulas, and baby food and baby beverages, because these products are not consumed by the general population and the selected models are not appropriate for their evaluation.

How products were identified and how nutrition data was collected: Three companies (Hindustan Unilever, Mother Dairy and Britannia Industries) supplied their full product list to the research team. Hindustan Unilever also provided nutrition information for its products. Products made by the other companies were collated from two sources i) the FoodSwitch India database, but only for products with data entered or updated after 1 July 2014; ii) in-store surveys done at retail and wholesale outlets in Hyderabad, Bangalore, Delhi and surrounding areas. Using a smart phone app, data collectors systematically photographed publicly available nutrition information displayed on the product package. Nutrient information was extracted from photographs and entered into the project database. An iterative process of review was used whereby the products collected in-store were checked against any product portfolio information provided by companies, and information publicly available on company websites and in two large Indian online retailers. Products missing from the dataset were then targeted for collection.

At the end of the data collection period in July 2016, companies were provided with their data for review (product list and nutrient content) and offered an opportunity to make corrections or additions to information about their product range. Coca-Cola India, Britannia Industries, Mondelez India and Hindustan Unilever did so and any corrected or added information was updated in the project database. The dataset, therefore, contains a substantial majority, if not all, of most companies' products produced for the Indian market.⁴

Nutrition data and categorization of products: The vast majority of the product labels met national Indian requirements (protein, energy, total fat, carbohydrate and sugar)⁵ but less than one third displayed information for sodium and saturated fat as recommended by Codex.⁶ Information about added sugar, fiber, calcium, and other vitamins and minerals was much less frequently available. For most products, the available nutritional information was insufficient to apply the selected nutrient profile models and so missing data was imputed, i.e. it was derived from data for similar products in the TGI database. While this is a limitation of the approach, the most likely impact of using proxy nutrient values is the underestimation of the real differences between products and therefore an underestimation of the real differences between companies.

Analysis of compliance of the labels with Indian labeling requirements and Codex was based on the information extracted from the photographs of the labels.

Products were categorized in two ways: they were assigned to one of 515 categories used by the FoodSwitch India database to obtain the proxy data required to generate nutrient profile scores, as noted above. In addition, they were assigned to one of the 50 categories of the Euromonitor International food categorization system to allow nutrition data to be combined with sales data.

Final universe of products analyzed: The initial dataset consisted of 1,450 products from the covered companies; 59 were removed per the exclusion criteria above (i.e. baby foods, wheat, rice,). Then 60 were removed because they did not have sufficient baseline data to conduct nutrient profile scoring and 388 were removed as duplicates (i.e. different pack sizes of the same product). This left 943 products in the final dataset for analysis, including Nandini and ITC products. The total number of products assessed for the nine Index companies is 703. However, given that each nutrient profile model requires different data, the necessary data was not available for all products and thus not all were analyzed in each element of the study. TGI rated 937 products using the WHO EURO model (685 produced by the nine Index companies) and 918 using the HSR system (758 produced by the nine Index companies assessed for the Product Profile).

Nutritional quality analysis: Once the dataset was complete, the analysis was run using the two selected nutrient profiling models.

Pricing analysis: Indian retailers were reluctant to allow in-store collection of data on product prices. Regular retail prices were therefore collected instead from India's largest online retailer, BigBasket.com, recorded in August 2016, with care taken to assign correct prices by pack size. The price per 100g (ml) of the product (unit price) was then calculated. Not all products were displayed with a barcode, necessary to correctly match pricing and nutrition data. Further, perishable products, which make up a large proportion of those in the product dataset are not generally available for sale online. They are therefore not represented in the pricing dataset. Data was only available for 350 products in total (37% of the total dataset).

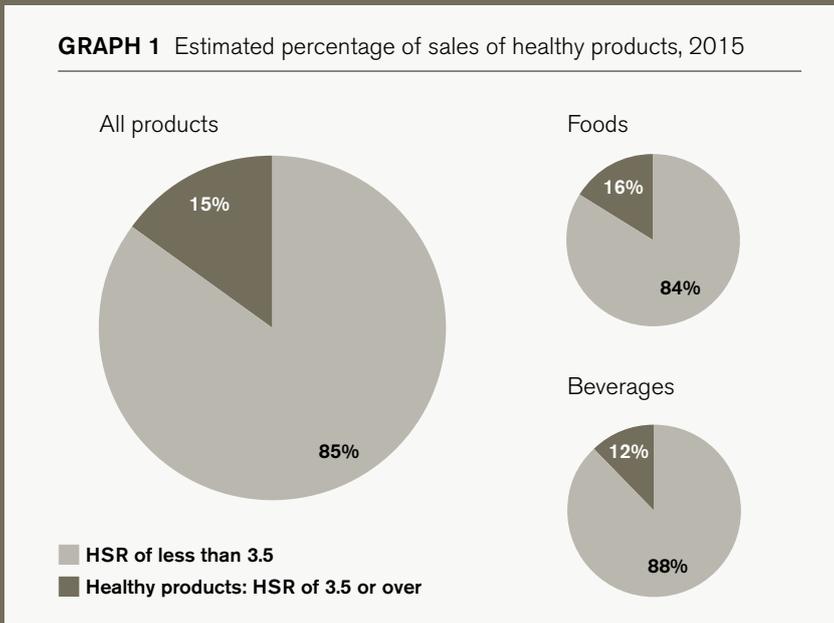
Outputs: A range of outputs resulted from the analysis, set out below, enabling observations to be made and conclusions to be drawn at both the aggregate and individual company level.



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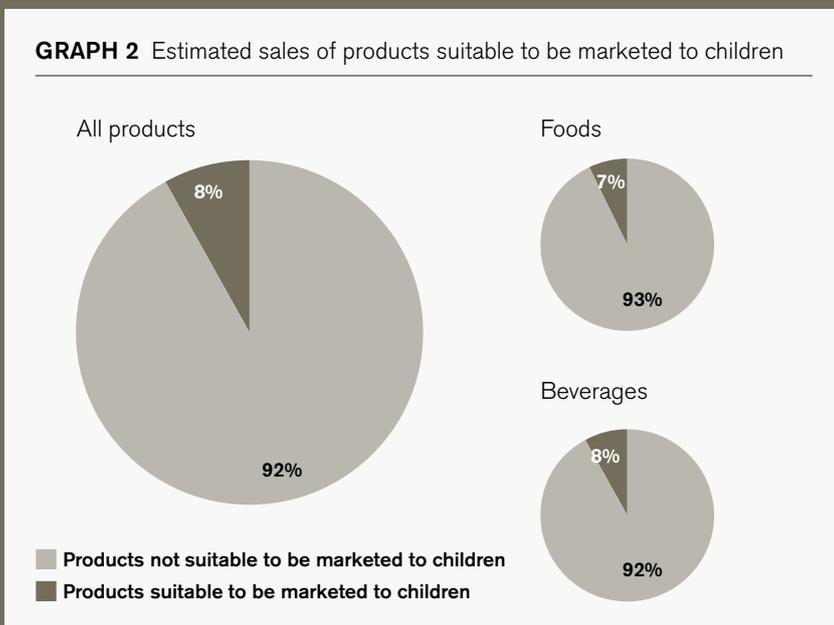
Key findings: Sector-level

GRAPH 1 Estimated percentage of sales of healthy products, 2015



- 15% of the sales of the nine Index companies in 2015 were estimated to be derived from products that are 'healthy' (i.e. achieve 3.5 stars or more on the Health Star Rating system – the threshold for healthy used by this study.)⁷
- Of the foods sold, 16% were estimated to have met the healthy standard whereas only 12% of the beverages sold were estimated to have met that standard.

GRAPH 2 Estimated sales of products suitable to be marketed to children



Note these figures do not necessarily relate to the sales of products that each company actually markets to children.

- Only 8% of the 2015 sales of the nine Index companies were estimated to be generated by products of sufficient nutritional quality to be marketed to children, according to the WHO EURO nutrient profiling model.
- Just 7% of the foods and 8% of the beverages sold by these companies are suitable to be marketed to children.

How overall sales of healthy products were calculated

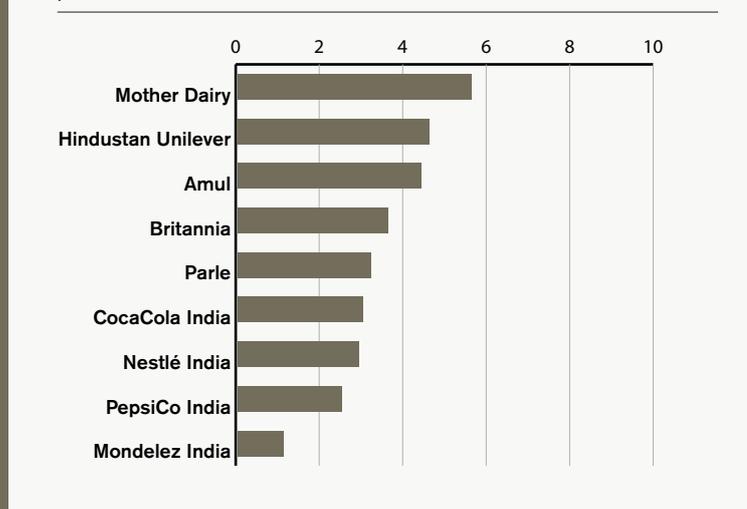
The following calculations based on HSR ratings were made for each company and aggregated.

Product category	Total no. of products	No. of products with HSR of 3.5 or more	% products, by no. with HSR or 3.5 or more	2015 sales INR mn	Total value of healthy sales 2015
Sweet biscuits	25	5	20%	75,000	15,000
Savory biscuits	10	2	20%	50,000	10,000
Spreads	3	0	0%	20,000	0
Juice drinks	5	1	20%	10,000	2,000
Total	43	8	18%	155,000	27,000
% healthy sales					17%

Note: These figures exclude sales of tea, instant coffee and products in categories where any company's sales account for less than 0.1% of market share. See TGI report for further explanation of the approach taken to calculating these figures.

Key findings: Company-level

GRAPH 3 Product Profile: Overall nutritional quality of products sold in India



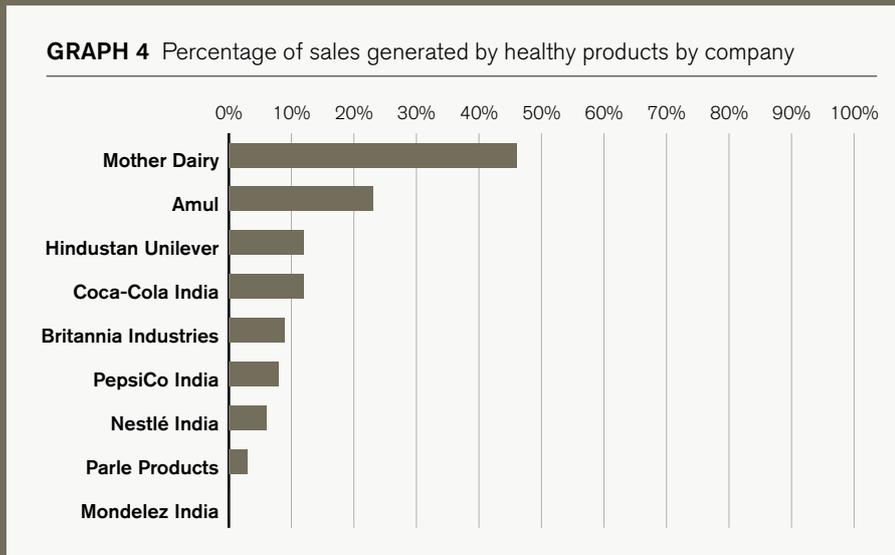
- The Product Profile results provide an indication of the overall nutritional quality of the sales of each company in 2015.
- The local Indian companies in the Index do relatively well in the Product Profile. Mother Dairy ranked first, with a sales-weighted score of 5.6 out of 10. This is because 77% of its sales derive from drinking milk products with an average of 2.7 out of 5 stars. (Some of the company's products in this category have relatively high sugar levels which brings down the average score). Amul ranked third, with a score of 4.4 out of 10 and Britannia Industries ranked fourth with a score of 3.6. Parle Products ranked fifth with a score of 3.2 out of 10.
- Hindustan Unilever ranked highest among the multinationals, at second with a score of 4.6 out of 10.
- Coca-Cola India, Nestlé India and Mondelez India all ranked in the bottom three, with scores ranging from 3 to 1.1 out of 10.

Box 33: How the Product Profile score is calculated: an example

A mean HSR was calculated for each relevant Euromonitor category for each company. This figure was then multiplied by the 2015 sales of that category (using Euromonitor data) to generate a sales-weighted score for each category. These category-level figures were then added up to give the initial sales-weighted HSR rating for the whole portfolio, out of a possible total of 5, which would indicate that all of the company's sales derive from products that achieve a Health Star Rating of 5 out of 5. The lowest possible initial sales-weighted HSR rating is 0.5, which would indicate that all of the company's sales derive from products that get a Health Star Rating of 0.5. To facilitate comparison of the Corporate Profile scores (which are calculated out of a maximum of 10), the initial sales-weighted HSR score was doubled so that it is also presented as a score out of 10.

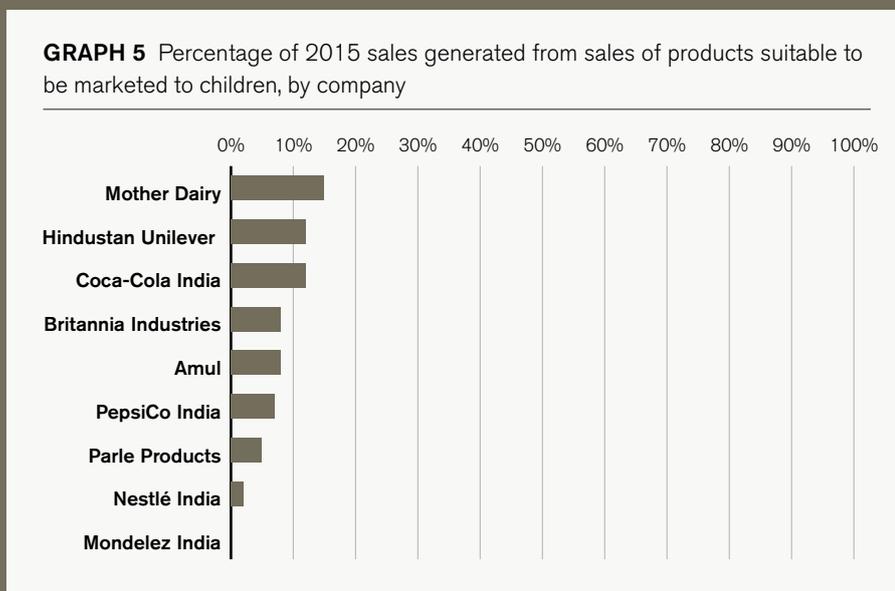
Product category	Mean HSR	% sales 2015	Sales weighted score
Sweet biscuits	0.75	25%	0.19
Savory biscuits	1.20	20%	0.24
Spreads	0.66	50%	0.33
Juice drinks	2.10	5%	0.10
Initial sales-weighted HSR rating			0.86 out of 5
Final PP score			1.72 out of 10

The full data set used to calculate these figures is available in Annex 5.



See explanation in sector-level findings for a summary of how these figures were generated and see the TGI report for a comprehensive explanation.

- The proportion of companies' 2015 sales estimated to be generated from healthy products (i.e. that achieve an HSR rating of 3.5 stars or more) varies significantly. Mother Dairy was estimated to have generated 46% of its 2015 sales from healthy products whereas only 23% of Amul's sales in that year derived from healthy products. Hindustan Unilever and Coca-Cola India each generated approximately 12% of 2015 sales from products that achieved an HSR rating of 3.5 or more.
- Britannia Industries, PepsiCo India, Nestlé India and Parle Products derived less than 10% of their total 2015 sales from healthy products. Mondelez India does not sell any products with an HSR above 3.5 stars.



See explanation in sector-level findings for a summary of how these figures were generated and see the TGI report for a comprehensive explanation.

- In terms of the percentage of 2015 sales estimated to be generated by products suitable to be marketed to children, Mother Dairy generated around 15% of sales that year from such products. Hindustan Unilever and Coca-Cola India derived 12% of 2015 sales from such products. All other companies generated less than 8% of their sales from products suitable to be marketed to children. (Note that this does not imply that these companies actually market these products to children.)

Box 34: Discrepancies between companies' figures and those generated by the Health Star Rating

The Product Profile highlights substantial discrepancies between the proportions of foods and beverages defined as healthy by some companies using their own Nutrient Profiling Systems and the proportions defined as healthy using the Health Star Rating system. In all cases, the proportion resulting from the HSR calculations was lower than the proportion the companies' systems generated. The companies that provided data to ATNF on the proportion of their products assessed as healthy were: Britannia Industries, Hindustan Unilever, Mother Dairy, Nestlé India and Mondelez India. However, only Hindustan Unilever, Nestlé India and Mondelez India publish their systems to enable scrutiny. This implies that the companies' own systems for assessing nutritional quality are less strict than the HSR system and/or differ substantially in the way that they calculate nutritional quality and set their healthy standard. Further exploration is needed to explain the differences fully. It is not clear how Mother Dairy and Britannia Industries arrived at the figures they provided for the number or proportion of healthy products in their portfolios.

Are products labeled in accordance with Indian labeling regulations and with Codex recommendations?

At the time of publication, the FSSAI required the nutrients shown in Table 1 to be included on product labels⁸. In June 2016, it passed an amendment creating additional labeling requirements for saturated and trans fats for packaged foods, but this amendment only comes into force from 2 December 2016. This amendment brings Indian labeling requirements more closely into line - but not fully - with nutrients recommended to be included on labels by Codex Alimentarius Guidelines on Nutrition Labeling CAC/GL-2-1985 (most recently amended in 2011). These new requirements do not include salt/sodium to be labeled.

The analysis presented below assessed compliance with Indian regulations in force as of the end of June 2016.

Table 1 Nutrients required to be labeled under Indian regulations and Codex

Nutrients required	Indian Regulations	Codex
Protein	●	●
Energy	●	●
Total fat	●	●
Saturated fats	●	●
Trans fat	●	[●]
Carbohydrate	●	●
Total sugars	●	●
Sodium		●
Other*		●

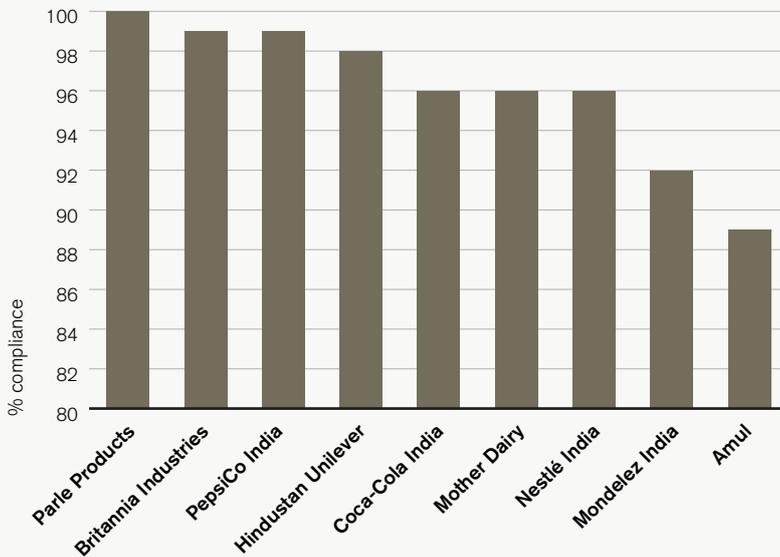
● Current ○ Additional from Dec 2016

Not filled in means no and/or not specified.

* Amount of any other nutrient for which a nutrition claim is made

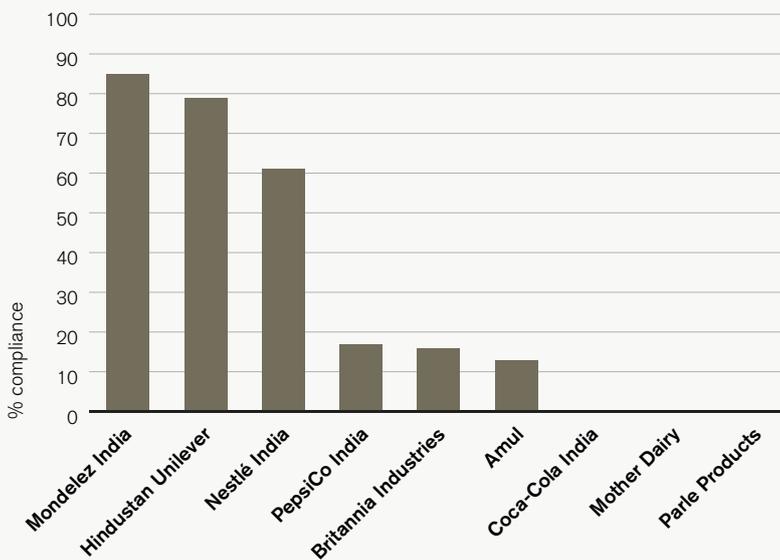
As illustrated in Graph 6, most of the companies exhibit a high level of compliance with the statutory Indian labeling requirements in force at the time of analysis; average compliance is 96%.⁹ One company is in complete compliance: Parle Products. Britannia Industries and PepsiCo India achieved 99% compliance and Hindustan Unilever 98%. All other companies, other than Amul, had greater than 90% compliance. Only 89% of Amul's product labels were aligned with Indian regulations on nutrition labeling.

GRAPH 6 Percent compliance with Indian labeling regulations by company – overall product portfolio



Compliance with the more comprehensive Codex recommendations is much lower, as shown in Graph 7, with only 23% of all products overall labeled in line with them. However, Mondelez India achieved the highest level of compliance, at 85%, followed by Hindustan Unilever with 79%. The majority of Nestlé India’s products also complied (61%). PepsiCo India, Britannia Industries and Amul’s level of compliance was very low, below 20%. Three companies did not label any products in line with Codex – Coca-Cola India, Parle Products and Mother Dairy.

GRAPH 7 Proportion of each company’s products meeting Codex nutritional labeling recommendations



Key recommendations

- **Widespread reformulation is urgently needed:** The companies analyzed in this study urgently need to reformulate many of their packaged foods by cutting sugar, salt and saturated fat particularly. Beverage producers also need to take steps to reduce sugar levels in their products substantially and to diversify product ranges to offer more healthy beverages with no or little added sugar.
- **Redirect marketing towards healthier products:** Sales figures inherently capture to some degree the marketing effort companies put into selling products. These results indicated that several of the companies need to spend much more on marketing their healthier options and much less on marketing their less healthy products. For unhealthy or so-called 'indulgent' products, messaging needs to be around limiting consumption to small portions on very few occasions.
- **Companies that have NPSs should review them:** The analysis has shown that the figures provided by some companies as to the number of products defined as healthy by their own NPS differ substantially from the figures generated by analysis using the HSR system. These companies should take the opportunity to check that their systems fully align both with international dietary guidelines and published models that have broad stakeholder support.
- **All companies that do not already use an NPS must adopt one that is robust, accurate and unbiased, developed with extensive independent expert input:** It is essential for companies to have a nutrient profiling system to analyze the nutritional quality of their portfolios, and to underpin reformulation, new product development and marketing to children. These systems must align with international dietary guidelines and be consistent with internationally agreed nutrient profile models such as those published by WHO. The models should be thoroughly reviewed by independent experts to ensure that they are robust, accurate and unbiased – i.e. do not classify companies' products as healthy when they are not. They must be published too, to facilitate evaluation and comparison with others.
- **The Government of India should adopt an NPS suited to the Indian context:** Future analysis would be greatly facilitated if the Government were to adopt one of the many well-supported nutrient profiling models that have already been developed and adapt it to the Indian context, taking food and dietary norms and needs into account. The Government could then also use such a system, as other countries have, to restrict marketing to children, guide front-of-pack labeling requirements or underpin evaluation of submissions for health claims.
- **The Government of India should further extend Indian labeling regulations to align with Codex and require salt/sodium to be listed:** The lack of comprehensive mandatory nutrition content labeling of products meant that some proxy data had to be used. Thus, the products' scores will not be completely accurate. Better mandatory labeling is essential both for consumers and to enable proper monitoring of products' nutritional composition. The new June 2016 amendment to nutrition labeling regulations for packaged foods that requires that both saturated fat and trans fats be included on labels from December 2016 is a step in the right direction. However, the proven link between high salt consumption and hypertension means that the Government of India should also add a requirement to label sodium/salt, which would bring India's nutrition labeling regulations fully into line with Codex. If the Government takes the step of adopting an India-specific nutrient profiling system, it should at that time further amend the regulations to require all food components included in that NPS to be labeled, to facilitate its application.



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Detailed results

Which categories and how many products does each company manufacture?

Of the nine India Spotlight Index companies, PepsiCo India offers the largest number of products for sale (141), around two thirds of which were savory snacks (potato chips, extruded snacks, Indian namkeen), including multiple flavor variants across its Lay's, Kurkure and Lehare brands. Hindustan Unilever (excluding tea bags) and Mother Dairy both offer more than 100 products; the biggest categories for both were ice-creams and frozen desserts. By contrast, Coca-Cola India sells the smallest range of products, with just 33 beverages.

Most companies only sell products across few categories; for example, the portfolios of Mother Dairy and Amul are made up almost exclusively of dairy products. Britannia Industries and Parle Products make predominantly sweet and savory biscuits and snacks. In some categories, only one company made products, such as Hindustan Unilever which is the only company to make soups. The biggest category, with six companies contributing products, was sweet biscuits.

TABLE 2 Number of products by company organized by Euromonitor category

Euromonitor Subset	Britannia Industries	Coca-Cola India	Amul	Hindustan Unilever	Mondelez India	Mother Dairy	Nestlé India	Parle Products	PepsiCo India	Total
BEVERAGES										
Regular cola carbonates	0	2	0	0	0	0	0	0	1	3
Low calorie cola carbonates	0	2	0	0	0	0	0	0	1	3
Lemonade/lime carbonates	0	4	0	0	0	0	0	0	2	6
Orange carbonates	0	1	0	0	0	0	0	0	1	2
Mixers	0	5	0	0	0	0	0	0	2	7
Other non-cola carbonates	0	3	0	0	0	0	0	0	1	4
Nectars (25-99% juice)	0	1	0	6	0	0	0	0	0	7
Juice drinks (up to 24% juice)	0	7	0	0	0	7	0	0	19	33
Still bottled water	0	2	0	0	0	0	0	0	1	3
Sports drinks	0	0	0	0	0	0	0	0	3	3
Liquid concentrates	0	0	0	1	0	0	2	0	0	3
Powder concentrates	0	0	0	2	7	0	4	0	2	15
Ready-to-drink tea	0	2	0	1	0	0	0	0	2	5
Hot beverages	0	1	1	8	5	0	12	0	0	27
Subtotal beverage	0	30	1	18	12	7	18	0	35	121

Note: Tea and instant coffee products (with no additional ingredients) are excluded

Euromonitor Subset	Britannia Industries	Coca-Cola India	Amul	Hindustan Unilever	Mondelez India	Mother Dairy	Nestlé India	Parle Products	PepsiCo India	Total
FOODS										
Bread	7	0	0	0	0	0	0	0	0	7
Cake	12	0	0	0	0	0	0	0	0	12
Dessert mixes	0	0	0	0	0	0	0	0	0	0
Savory biscuits	8	0	0	0	0	0	0	10	0	18
Sweet biscuits	46	0	0	0	7	0	1	45	0	99
Breakfast cereals	0	0	0	2	0	0	2	0	14	18
Confectionery	0	0	3	0	29	0	13	12	0	57
Cheese	7	0	9	0	0	4	0	0	0	20
Drinking milk products	3	2	19	0	0	16	4	0	0	44
Yoghurt and sour milk	3	0	5	0	0	14	8	0	0	30
Ice cream and frozen desserts	0	0	41	34	0	56	0	0	0	131
Fats and oils	1	0	5	0	0	7	0	0	0	13
Processed fruit and vegetables	0	0	0	0	0	3	0	0	0	3
Ready meals	0	0	1	0	0	1	3	0	0	5
Rice, pasta and noodles	0	0	0	5	0	0	7	0	0	12
Cooking sauces	0	0	0	17	0	0	6	0	0	23
Table sauces	0	0	0	8	0	7	4	0	0	19
Soup	0	0	0	19	0	0	0	0	0	19
Spreads	0	0	0	7	0	4	0	0	0	11
Savoury snacks	0	0	0	0	0	0	0	9	92	101
Other dairy products	0	0	1	0	0	2	1	0	0	4
Whitener	0	1	2	0	0	1	3	0	0	7
Condensed milk	0	0	1	0	0	0	2	0	0	3
Subtotal foods	87	3	87	92	36	115	54	76	106	656
Total beverages and food	87	33	88	110	48	122	72	76	141	777

Note:

- Euromonitor listed data for additional product categories but TGI did not find all products during the data collection phase. Those products are therefore not included in the sales-weighted calculations.
- Euromonitor classifies all dairy products as foods.

What is the spread of nutritional quality of the products offered by the nine Index companies overall?

The nine Index companies assessed offer products of a range of nutritional qualities, but a large number (402) score particularly poorly in terms of healthiness, i.e. 1.5 stars or below, accounting for 53% of all products on the market. The number and percentage of products that score 3.5 and above and can be considered healthy is low: 123 products, accounting for only 16% of all products analyzed.

TABLE 3 Spread of nutritional quality of products offered by all companies

Star rating (HSR model): 3.5 stars or more = healthy product											
	0.5	1	1.5	2	2.5	3	3.5	4	4.5	5	Total
Britannia Industries	11	8	23	23	2	9	4	6	1	0	87
Coca-Cola India	6	11	5	4	0	1	1	0	0	5	33
Amul	12	10	8	19	15	6	5	8	1	1	85
Hindustan Unilever	4	12	8	12	7	24	13	23	0	0	103
Mondelez India	41	2	2	0	1	0	0	0	0	0	46
Mother Dairy	4	7	23	27	20	8	7	8	12	4	120
Nestlé India	35	3	5	5	4	9	1	4	2	0	68
Parle Products	14	12	26	5	8	8	1	1	0	0	75
PepsiCo India	70	20	20	8	4	4	1	3	7	4	141
Total no. of products	197	85	120	103	61	69	33	53	23	14	758
% of total products	26%	11%	16%	14%	8%	9%	4%	7%	3%	2%	100%

How does the percentage of each company's product portfolio (by number) rated healthy using the Health Star Rating system compare to the percentage of sales each company generates from these products?

The proportion of healthy products offered by only two companies exceeds 25% - Hindustan Unilever (39%) and Mother Dairy (27%). However, taking into account the level of sales of these products reveals a very different picture, as shown in Table 4.

The dairy-focused companies vary in the percentage of their revenues that resulted from selling healthy products: it is estimated that 46% of Mother Dairy's 2015 sales derived from the 27% of products rated as healthy. Amul generated an estimated 23% of its 2015 sales from the 17% of its products rated as healthy.

Of the companies that have broad product portfolios, such as Hindustan Unilever, while 39% of its products are rated as healthy, it generated only an estimated 12% of its 2015 sales from those products. Nestlé India's healthy products which number 12% of the total portfolio appeared to account for only 6% of its 2015 sales.

Table 4 Percentage of healthy products by number, and percentage of sales from healthy products

Company	% products by number scoring ≥ 3.5 HSR	% sales of healthy products
Hindustan Unilever	39%	12%
Mother Dairy	27%	46%
Coca-Cola India	19%	12%
Amul	17%	23%
Britannia Industries	13%	9%
Nestlé India	12%	6%
PepsiCo India	11%	8%
Parle Products	3%	3%
Mondelez India	0%	0%

Looking at the two companies that offer the largest number of beverages shows that while 19% of Coca-Cola India's products achieve an HSR of 3.5 stars or more, these products are estimated to have generated only around 12% of its 2015 sales. Only 11% of PepsiCo India's beverages gain a rating of 3.5 stars or more but they were estimated to have contributed only 8% to 2015 sales overall.

Of the two major biscuit producers, 13% of Britannia Industries' products are judged to be healthy and they contributed around 9% to the company's 2015 sales whereas only 3% of the products offered by Parle Products meet the healthy standard of 3.5 stars and they accounted for the same proportion of 2015 sales.

None of the products offered by Mondelez India, which offers only confectionery, sweet biscuits and flavored powdered hot drinks, is judged healthy.

How does the nutritional quality of products vary within sub-categories?

In 14 of the food sub-categories at least two companies make five or more products. The mean Health Star Rating for these sub-categories is illustrated in Table 5 by the short vertical line and the range of Health Star Ratings by the horizontal lines. These results show that there is significant variation in the nutritional quality of the products between companies and in some cases the lowest and highest HSR rating is substantially different. This indicates there is ample room for reformulation of some products within many sub-categories. For example, PepsiCo India's savory snacks rate on average much less than Parle Products' (1.1 versus 2.3) and Hindustan Unilever's cooking sauces average 3.5 stars versus those of Nestlé India that score only 1.8 on average.

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TABLE 5 Mean and range of Health Star Ratings for selected product sub-categories

	n	0	2.5 HSR	5	Mean HSR	(range)
Sweet Biscuits						
Britannia Industries	46				1.6	(0.5 to 3.0)
ITC	29				1.3	(0.5 to 3.0)
Parle Products	44				1.5	(0.5 to 4.0)
Mondelez India	7				1.1	(0.5 to 2.5)
Confectionery						
Mondelez India	29				0.5	(0.5 to 1.0)
Nestlé India	13				0.7	(0.5 to 3.0)
Parle Products	12				0.9	(0.5 to 2.0)
Drinking Milk Products						
Amul	19				2.8	(1.0 to 5.0)
Nandini	14				2.9	(0.5 to 4.5)
Mother Dairy	16				2.7	(1.0 to 4.5)
Ice Cream Frozen Desserts						
Amul	39				1.8	(0.5 to 2.5)
Hindustan Unilever	34				2.5	(1.0 to 4.0)
Nandini	26				1.7	(0.5 to 3.0)
Mother Dairy	55				2.1	(1.5 to 3.0)
Savory Snacks						
PepsiCo India	92				1.1	(0.5 to 4.5)
ITC	19				2.0	(1.5 to 3.0)
Parle Products	9				2.3	(1.5 to 3.5)
Hot Beverages						
Nestlé India	12				0.5	(0.5 to 1.0)
Mondelez India	5				0.5	(0.5 to 0.5)
Savory biscuits						
Britannia Industries	8				2.2	(1.5 to 3.5)
Amul	9				2.3	(1.5 to 3.0)
Cheese						
Britannia Industries	7				2.3	(1.5 to 3.0)
Amul	9				2.9	(0.5 to 4.0)
Yogurt and Sour Milk						
Mother Dairy	14				3.5	(2.0 to 4.5)
Nestlé India	8				3.4	(3.0 to 4.0)
Amul	5				3.5	(2.5 to 4.5)

	n	0	2.5 HSR	5	Mean HSR	(range)
Cooking sauces						
Hindustan Unilever	17				3.5	(3.0 to 4.0)
ITC	7				0.5	(0.5 to 0.5)
Nestlé India	6				1.8	(0.5 to 4.5)
Table Sauces						
Hindustan Unilever	8				2.1	(1.5 to 2.5)
Mother Dairy	7				3.9	(2.5 to 4.5)
Rice, pasta, noodles						
Hindustan Unilever	5				2.9	(2.5 to 3.0)
ITC	8				3.1	(2.0 to 4.0)
Nestlé India	7				1.4	(0.5 to 2.0)
Juice Drinks						
Coca-Cola India	7				0.8	(0.5 to 1.5)
PepsiCo India	19				0.7	(0.5 to 1.0)
Mother Dairy	6				1.1	(0.5 to 2.0)
ITC	5				1.8	(1.5 to 2.0)

What percentage of companies’ products by number are suitable to be marketed to children?

The number of products judged suitable for marketing to children using the WHO EURO model varies considerably across the companies and was on the whole lower than the proportions that met the healthy standard using the HSR system. Around 26% of Hindustan Unilever’s products met this standard as did 19% of Coca-Cola India’s and 11% of Mother Dairy’s. However, less than 10% of the other companies’ products are suitable for marketing to children.

Three companies provided figures, confidentially, to ATNF about the proportion of products they consider suitable to be marketed to children; the other companies did not. The figures provided by those three companies were all substantially higher than figures generated by the TGI study. However, Britannia Industries and Mother Dairy did not provide information to ATNF about their NPS and how they calculated their figures, and the model used by Mondelez India is quite different from the WHO EURO system.

This result indicates that more research is needed to understand these differences and underlines the importance of companies publishing details of their NPS so that stakeholders can interpret companies’ figures.

Table 6 Percentage of products suitable to be marketed to children, not sales weighted

	All products	Foods	Beverages
Hindustan Unilever	26%	26%	0%
Coca-Cola India	19%	n/a	19%
Mother Dairy	11%	11%	n/a
PepsiCo India	9%	8%	10%
Britannia Industries	8%	8%	n/a
Parle Products	7%	7%	n/a
Nestlé India	6%	6%	0%
Amul	5%	5%	n/a
Mondelez India	0%	0%	n/a

Note, however, from the Corporate Profile research, that Coca-Cola India commits not to advertise any products to children under 12 on media where they comprise 35% or more of the audience.

Is there any evidence that healthier product options are more expensive than less healthy options?

It was possible to analyze the association between price and healthiness for 14 of the 22 Euromonitor food categories. In just four of those categories, a significant association was detected; in three cases (cheese, drinking milk, yogurt and sour milk) the healthier products were cheaper and in one (savory snacks) the healthier products were more expensive. In every other food category there was no detectable association of price with healthiness.

Similar analysis was possible for only 4 of the 17 Euromonitor beverage categories. There was only one sub-category for which there was evidence of a significant association between price and healthiness and that was for juice drinks, where healthier drinks were more expensive. Overall, for the 68 beverage products, there was a highly significant ($p < 0.001$) negative association between price and healthiness – i.e. healthier products were less expensive.

When the 350 food and beverage products were examined together, there was a highly significant inverse association ($p < 0.001$) indicating that healthier products tended to be less expensive.

However, caution must be exercised in interpreting these results because they are based on only 36% of the products in the overall study (350) and the numbers of products within most sub-categories analysed was relatively small (from 4 to 26).

Limitations

The limitations are set out more fully in the methodology section of this report and in the TGI report. In summary:

- Because this analysis focusses only on nine of the largest food and beverage manufacturers in India it does not provide comparative data on other purveyors of food, such as smaller manufactures, quick service restaurants and artisanal producers.
- There is no universally accepted system for determining the nutritional quality of products and the extent to which the HSR or WHO EURO system is appropriate to the Indian market has not yet been explored. Moreover, these models are both still in early stages of implementation and subject to ongoing evaluation and refinement. While both are based upon extensive research and validation, there is continuing discussion of how each operates for some food categories, e.g. 100% fruit juices and with respect to non-nutritive products such as tea and instant coffee.
- Most companies did not provide a complete list of all products they sell currently in India nor complete nutrition content information.
- Also, as some nutrition values for products were missing from labels, imputed values were used, derived from the existing TGI database of more than 10,000 products available in India. This proxy data should, therefore, be fairly accurate.
- Products' serving size, recommended by companies, is not taken into account because HSRs for all foods and beverages are calculated on a 100gm/100ml basis rather than taking recommended serving size into account. This can generate seemingly unrealistic results for some products typically consumed in small or large quantities.
- Moreover, the HSR system calculates product ratings on the basis of how they are sold, not on how they are generally consumed, e.g. milk powder and some drink powders were not assessed as they are typically consumed, e.g. by mixing them with water.
- Some single ingredient products, such as instant coffee and tea bags, were not scored although some companies, such as Nestlé India and Hindustan Unilever generate significant revenues from them.
- The approach to generating sales-weighted estimates is imperfect because it will not reflect the different levels of sales of more and less healthy products within a category. It is possible that the sales of healthy products, and those suitable to be marketed to children, accounted for a much smaller fraction of sales than this calculation indicates, in which case it will overestimate their sales. Conversely, if such products in reality accounted for a higher percentage of sales, the figures presented here will underestimate their actual sales.
- Little data was available on pricing due to Indian retailers being reluctant to allow in-store collection of data on product prices and the difficulty of collating pricing data from online sites. The total number of products for which data was available was only 350 and regression analysis looking at the association of pricing against healthiness was done on small sample sizes, limiting the conclusions that can be drawn from the results.

Future opportunities

This first-ever Product Profile for India demonstrates the great value of such studies to provide a comprehensive and clear picture of the nutritional quality of packaged foods that major companies market to consumers. It has also given some insight into whether such products are labeled well and their pricing relative to their healthiness.

If companies improve the nutritional quality of their products, diversify their portfolios to offer more healthy products or direct their marketing to healthier products to drive their sales, the Product Profile of future India Spotlight Indexes will demonstrate that and provide a way to track any improvements.

It is hoped that the next Product Profile will include an even larger and more accurate dataset created by companies sharing their full list of products and complete nutritional information. Similarly, obtaining full pricing data for all products would facilitate more complete analysis of the association between price and nutritional quality.

ATNF will work with TGI – and would welcome input from others – on how to improve the approach to Product Profile. Factoring in serving size, for example, would be a useful additional analytical tool.

Studies such of these would be helped enormously were the Government of India to adopt a national Nutrient Profiling model, through a multi-stakeholder process, much as the Government of Australia has done in developing the Health Star Rating. The model could be used for a variety of purposes, from restricting marketing to children to new front-of-pack labeling requirements or evaluating submissions for health claims. Were the Government to adopt such a model, it should also consider revising nutrition labeling requirements to ensure that all nutrients needed to apply the model must be listed on products.



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NOTES

- ¹ ATNF calculation using data from <http://www.tradingeconomics.com/india/consumer-spending> and Euromonitor.
- ² The methods for the study can be found at https://www.accessnutrition.org/sites/www.accessnutrition.org/files/atni_product_profile_methodology_final.pdf.
- ³ World Health Organization (in press) Nutrient profiling: catalogue of nutrient profile models: Geneva: WHO
- ⁴ The research team found that a lot of imported products, designed for other markets, are available for sale on online retail sites such as Amazon. These have not been included in the analysis.
- ⁵ Ministry of Health and Family Welfare,. (2011). *Notification. Food Safety and Standards (Packaging and Labelling) Regulations, 2011* (pp. [http://fssai.gov.in/Portals/0/Pdf/Food%20Safety%20and%20standards%20\(Packaging%20and%20Labelling\)%20regulation,%202011.pdf](http://fssai.gov.in/Portals/0/Pdf/Food%20Safety%20and%20standards%20(Packaging%20and%20Labelling)%20regulation,%202011.pdf)). New Delhi.
- ⁶ FAO,. *Codex Guidelines on Nutrition Labelling. CAC/GL 2-1985 (Rev. 1 - 1993)*.
- ⁷ The cut point of 3.5 or above (≥ 3.5 HSR) is based on work commissioned by the New South Wales Ministry of Health in Australia examining the alignment of HSR with existing school food service provision standards and the Australian 2013 Dietary Guidelines. That work found that “healthy core foods with a HSR of ≥ 3.5 can be confidently promoted in public settings as healthier choices.”
- ⁸ Food Safety and Standards (Packaging and Labelling) Regulations 2011 (India), Section 3(v)(i)
- ⁹ Note that Gujarat Cooperative Milk Marketing Federation (Amul) displayed added but not total sugar amounts for the majority of its products. This was assessed as compliant with Indian regulation which does not specify which type of sugar content should be displayed, but not with the Codex Guidelines which state that total sugars be displayed.

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Table 7 Individual companies' product profile score calculations

Company	Euromonitor category	% sales, 2015	Mean HSR	Initial sales-weighted rating Max = 5	Final Product Profile score Max = 10
Amul		100%		2.2	4.4
	Yogurt and Sour Milk Products	10%	3.50	0.35	
	Cheese	5%	2.94	0.16	
	Drinking Milk Products	44%	2.84	1.26	
	Confectionery	1%	1.00	0.01	
	Oils and Fats	26%	0.70	0.18	
	Ice Cream	9%	1.78	0.16	
	Other Dairy	4%	1.88	0.08	
Excluded	Ready meals (<0.1 market share)				
Britannia Industries		100%		1.8	3.6
	Yogurt and Sour Milk Products	2%	2.83	0.05	
	Bread	7%	3.79	0.28	
	Savory Biscuits	11%	2.19	0.24	
	Cheese	3%	2.29	0.07	
	Cakes	4%	1.42	0.06	
	Sweet Biscuits	68%	1.55	1.06	
	Drinking Milk Products	1%	2.67	0.03	
	Butter and Margarine	4%	0.50	0.02	
Excluded	Other dairy (<0.1 market share)				
Coca-Cola India		100%		1.50	3.0
	Still Bottled Water	11%	5.00	0.55	
	Mixers	1%	3.60	0.04	
	Low-calorie Cola Carbonates	1%	2.00	0.01	
	Lemonade/Limeade	30%	1.25	0.38	
	Regular Cola Carbonates	26%	1.00	0.26	
	Orange Carbonates	5%	1.00	0.05	
	Juice Drinks (up to 24% Juice)	26%	0.79	0.20	
Excluded	Whitener, hot 1 beverage, 1 nectar, 2 RTD tea (<0.1 market share); drinking milks (new 2016)				

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Company	Euromonitor category	% sales, 2015	Mean HSR	Initial sales-weighted rating Max = 5	Final Product Profile score Max = 10
Hindustan Unilever		100%		2.28	4.6
	Soup	12%	3.82	0.47	
	Cooking Sauces	1%	3.50	0.03	
	Instant Noodles	0.5%	2.90	0.01	
	Table Sauces	18%	2.13	0.39	
	Jams and Preserves	10%	1.71	0.17	
	Still RTD Tea	4%	1.00	0.04	
	Ice Cream	45%	2.47	1.11	
	Liquid Concentrates	8%	0.50	0.04	
Excluded	Tea, coffee (no HSR, 75% of sales); breakfast cereal, nectars, powder concentrates (<0.1% market share); dessert mixes (no products found by TGI)				
Mondelez India		100%		0.55	1.1
	Sweet Biscuits	4%	1.07	0.04	
	Confectionary	84%	0.53	0.44	
	Flavored Powder Drinks	12%	0.50	0.06	
	Powder Concentrates	1%	0.50	0.00	
Excluded	Other baby food (no HSR)				
Mother Dairy		100%		2.78	5.6
	Processed Frozen Fruit and Vegetables	2%	5.00	0.08	
	Yogurt and Sour Milk Products	13%	3.50	0.44	
	Drinking Milk Products	77%	2.70	2.07	
	Butter and Margarine	2%	2.00	0.04	
	Ice Cream	7%	2.10	0.15	
Excluded	Cheese, ready meals, juice drinks (<0.1% market share). Tomato pastes and purees, jams and preserves, other dairy (<0.5% sales)				
Nestlé India		100%		1.47	2.9
	Yogurt	11%	3.38	0.39	
	Drinking Milks	4%	3.00	0.12	
	Table Sauces	9%	2.50	0.22	
	Condensed Milk	7%	1.33	0.09	
	Dried Ready Meals	3%	1.83	0.06	
	Dehydrated Soup	1%	1.83	0.03	
	Noodles	16%	1.43	0.22	
	Confectionery	38%	0.73	0.28	
	Coffee Whiteners	10%	0.50	0.05	
Excluded	Instant coffee, (no HSR); breakfast cereal, powder concentrates (<0.1 market share); dessert mixes (not found by TGI)				

PRODUCT PROFILE

Company	Euromonitor category	% sales, 2015	Mean HSR	Initial sales-weighted rating Max = 5	Final Product Profile score Max = 10
Parle Products		100%		1.60	3.2
	Savory Snacks	8%	2.33	0.18	
	Savory Biscuits	11%	2.00	0.22	
	Sweet Biscuits	72%	1.55	1.11	
	Confectionery	10%	0.88	0.08	
Excluded	None				
PepsiCo India		100%		1.25	2.5
	Still Bottled Water	5%	5.00	0.25	
	Mixers	1%	5.00	0.06	
	Hot Cereals	1%	3.29	0.05	
	Savory snacks	47%	1.10	0.52	
	Sports Drinks	1%	1.50	0.01	
	Regular Cola Carbonates	11%	1.00	0.11	
	Other Non-Cola Carbonates	6%	1.00	0.06	
	Lemonade/Limeade	5%	1.00	0.05	
	Juice Drinks (up to 24% Juice)	19%	0.71	0.14	
	Orange Carbonates	4%	0.50	0.02	
Excluded	Powder concentrates, RTD tea (<0.1 market share); low-calorie carbonates (<0.5% sales)				

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Note

Sustainalytics has produced the scoring and ranking of company performance for the Corporate Profile of the India Spotlight Index. Sustainalytics contributed to the report and company scorecards for the Index, and engaged with food and beverage companies as part of the data collection and analysis process.

Westat is responsible for the collection of data related to company compliance with the International Code of Marketing of Breast-milk Substitutes and any additional country-specific regulations related to marketing of these products in Mumbai. Westat is responsible for the analysis of the data related to compliance with the BMS marketing standards and for the preparation of its final study report, the results of which have been incorporated by ATNF into the 2016 India Spotlight Index report and the scoring of company performance for the same Index.

The George Institute (TGI) is responsible for the nutrition and labeling data collection for the Product Profile assessment in India. TGI is also responsible for the analysis of the nutrition and labeling data related to the Product Profile and the TGI Product Profile final report, the results of which have been incorporated by ATNF into the 2016 India Access to Nutrition report and the scoring of company performance for the same Index.

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Development

73bit Limited (www.73bit.com)

Probench a tool developed by 73bit, set up the online data platform used to collect and process company data. Probench was also used to develop automatic scoring sheets and reports that fed into the scorecards.

ontwerpwerk

Design & development

Ontwerpwerk Design and Development, a Dutch design agency in The Hague, designed and developed the report and website.

Language editor

Koan Communications: copywriting report and scorecards.

