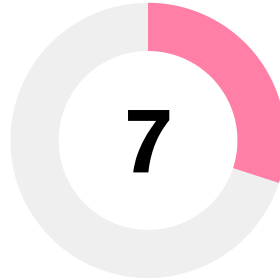


Mother Dairy

Product Profile Categories

Dairy; Edible Oils; Ice Cream and Frozen Desserts; Processed Fruit and Vegetables



Rank 7 / Score 3

Rank 7 (2016)



Product Profile

Rank 1 / Score 7.5

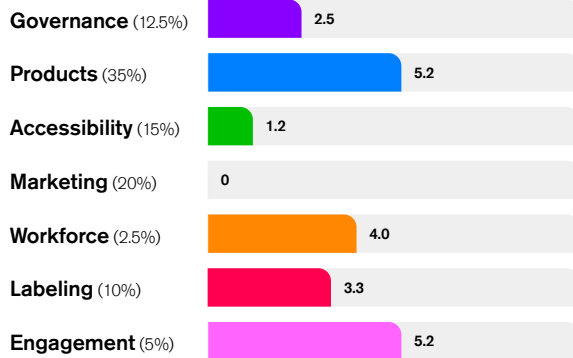
Headquarters
India

Retail sales (INR – millions)
155287

Number of employees
3269

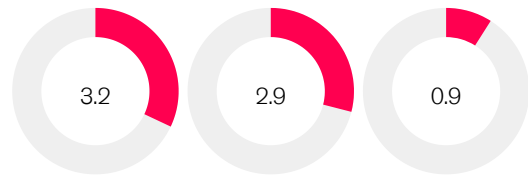
Company Profile

Rank 7 **Score 3**



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

Commitment **Performance** **Disclosure**



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

Main areas of strength

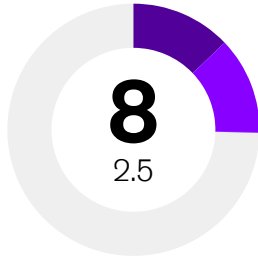
- Mother Dairy ranks first in the Product Profile with a score of 7.5 out of 10. It is estimated that the company derived 53% of its 2018 sales from products that achieve a Health Star Rating (HSR) of 3.5 or more out of 5, i.e. the 'healthy' threshold. This is higher than the company's 2016 healthy product sales estimate of 46%. Mother Dairy's products are relatively healthy compared to those of its peers within the same product categories, most notably in the Dairy and Edible Oils product categories.
- Among the five companies in the dairy industry segment, Mother Dairy performed best in both the overall Index and the Product Profile.
- Mother Dairy voluntarily fortifies all relevant products according to the Food Safety and Standards Authority of India (FSSAI)'s Food Safety and Standards (Fortification of Foods) Regulation, 2018. This is best practice and illustrates the company's commitment to tackle vitamin A and D deficiencies in India.
- The company has several initiatives to improve the affordability and accessibility of its healthy and fortified products. For example, it sells bulk-vended milk fortified with vitamins A and D at a stable and affordable price point in the National Capital Region and other parts of India. Mother Dairy's initiatives also aim to improve the distribution of fortified milk and the sale of affordable fruit and vegetable products.
- As part of its Safe and Nutritious Food at the Workplace Initiative, and as recommended by FSSAI, Mother Dairy has a robust employee health and wellness program called Sahi Poshan Swasth Jeevan (right nutrition, healthy life). The program addresses both nutrition and physical activity.
- The company actively engages with FSSAI's Eat Right Movement by contributing in the development of the Swasth Bharat Yatra (healthy India journey) and Eat Right Mela (Fair). Mother Dairy also aims to promote nutrition literacy among its consumers and to reduce the consumption of oil. The Zara Sa Badalav Banaye Life Behatar campaign (a little change can improve your life) is a relevant example that addresses these elements.

Priority areas for improvement

- Mother Dairy ranks seventh overall in the India Index 2020, as it did in 2016, with a score of 3.0 out of 10.
- The company is encouraged to adopt and publish a formal comprehensive nutrition strategy that clearly sets out how it addresses malnutrition in India, including issues of obesity and diet-related diseases, through its core business model. The strategy should publicly recognize the nutrition and health priorities set out in the National Nutrition Strategy and Vision 2022 (Kuposhan Mukh Bharat – free from malnutrition, across the life cycle), and POSHAN Abhiyaan.
- In 2016, Mother Dairy indicated that it was developing a Nutrient Profiling System to guide the reformulation of its products and to develop new healthy products, but the system was not finalized at the time of this assessment. The company is urged to take this important step and to define targets for reducing levels of sugar, salt and saturated fat in its products.
- Mother Dairy could complement its affordability strategy by adopting a comprehensive accessibility strategy that includes targets to distribute its healthy products more widely. Ideally, the strategy should cover all states the company is present in, with specific attention to aspirational districts, isolated rural areas, urban slums and low-income groups in India.
- Mother Dairy is advised to adopt a responsible marketing policy covering all consumer groups, with specific commitments regarding children and teenagers. It may consider signing the Food and Beverage Alliance India Pledge (FBAI) as a first step towards this aim. The company should further commit to only marketing products to children that meet the World Health Organization's (WHO) South-East Asia Region (SEAR) regional standard. The Product Profile found that 35% of its products currently meet this standard.
- The company could improve its labeling practices by ensuring nutrition information is provided on all products according to the Codex Alimentarius guidelines, and in compliance with local regulations in India. Mother Dairy is also encouraged to implement an interpretive front-of-pack labeling system as soon as possible, that aligns with other companies or industry associations, and is developed in partnership with the Government and other relevant stakeholders.

Category Analysis

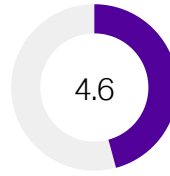
Governance



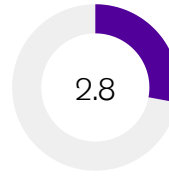
- A1** Nutrition strategy
- A2** Nutrition management
- A3** Reporting quality

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

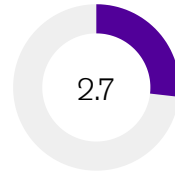
Commitment



Performance



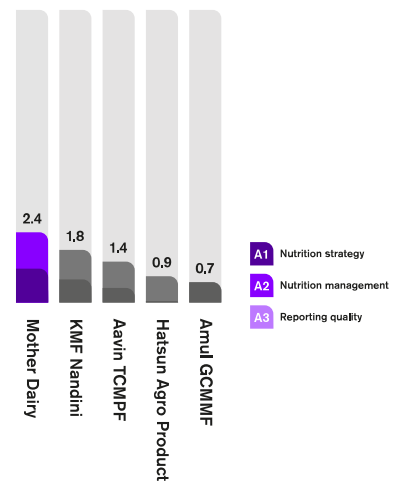
Disclosure



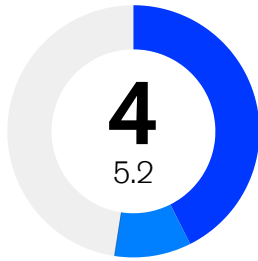
The circle on the left represents the company result for this Index category, showing the rank out of 16 and the score below it. The colored segments represent the respective criteria contributions to the overall category score. The above circles indicate how the company performs on the three types of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

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

Peer Comparison



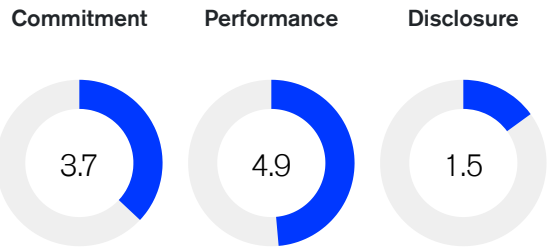
Products



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

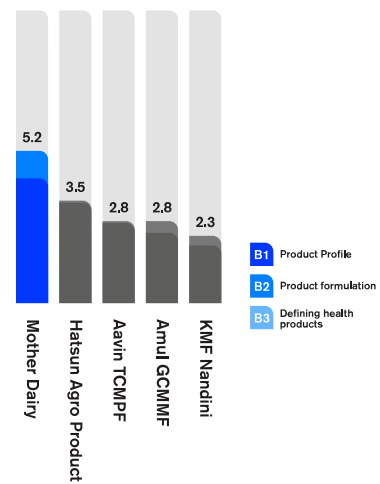
All category, criteria, commitment, performance and disclosure scores are out of 10

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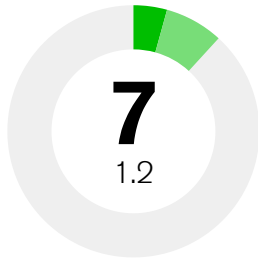


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Peer Comparison

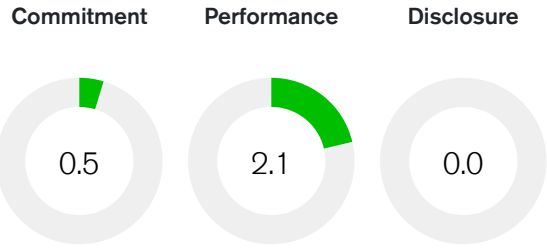


Accessibility



- C1** Product pricing
- C2** Product distribution

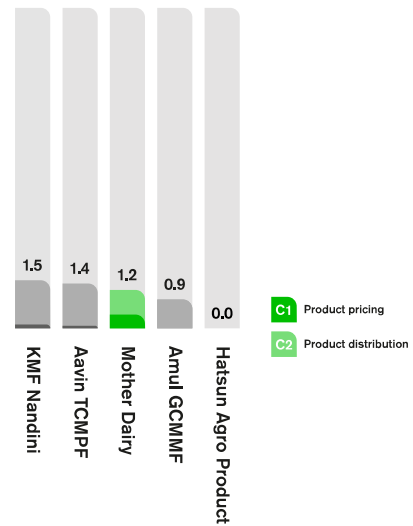
All category, criteria, commitment, performance and disclosure scores are out of 10



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Peer Comparison



Marketing



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

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

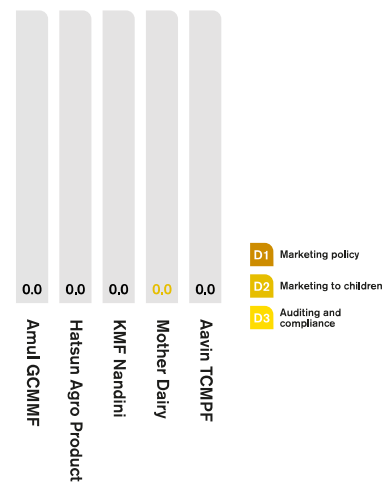
Commitment Performance Disclosure



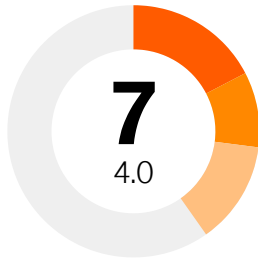
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Peer Comparison

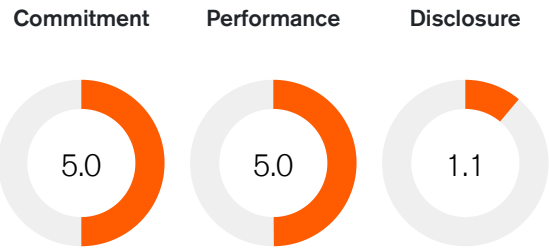


Workforce



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

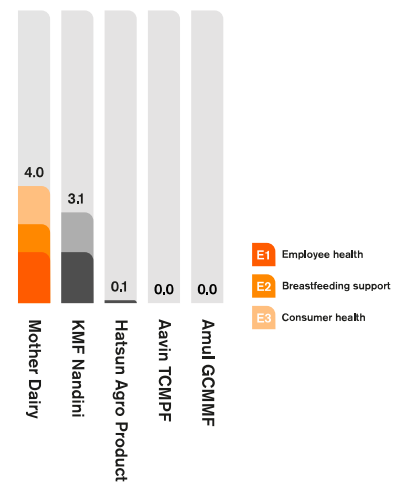
All category, criteria, commitment, performance and disclosure scores are out of 10



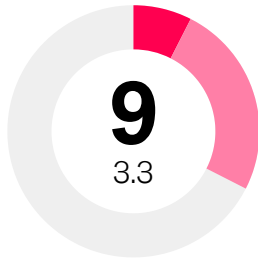
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Peer Comparison



Labeling



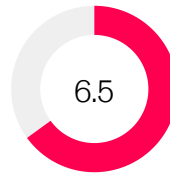
- F1** Product labeling
- F2** Claims

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

Commitment

Performance

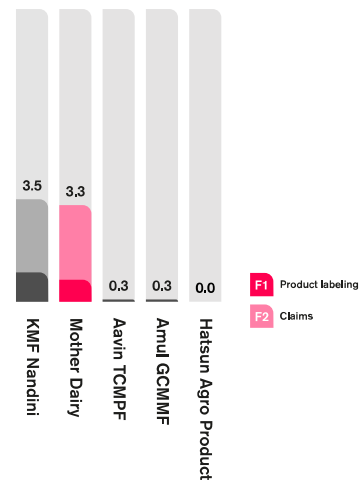
Disclosure



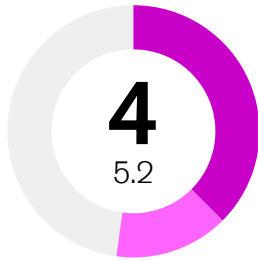
For this category performance indicators were not included. The circle on the left represents the company result for this Index category, showing the rank out of 16 and the score below it. The colored segments represent the respective criteria contributions to the overall category score. The above circles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

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Peer Comparison



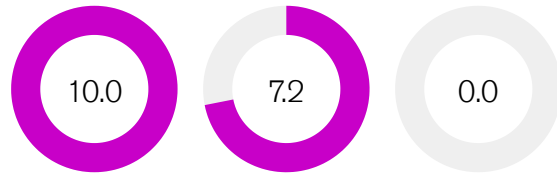
Engagement



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

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

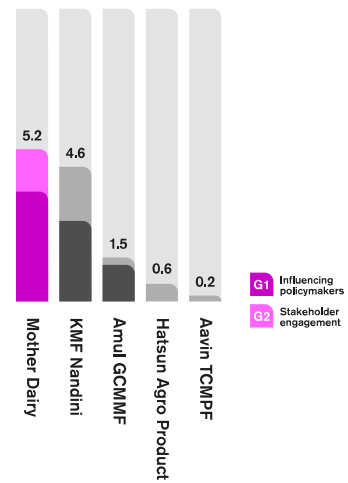
Commitment Performance Disclosure



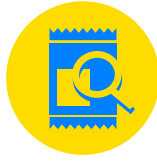
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Peer Comparison



Product Profile



Rank 1 / Score 7.5

Portfolio-level Results

Average HSR score products (sales-weighted)	Healthy products (HSR)			Products suitable to market to children (WHO SEAR)			Range of total India F&B sales included
	% products healthy	% sales healthy	No. products assessed	% products suitable	% sales suitable	No. products assessed	
3.0	41%	53%	99	35%	44%	106	90-100%

- A total of 106 products from across four categories, representing 90-100% of Mother Dairy's estimated 2018 retail sales, were included in the Product Profile. Of those, 99 could be assessed using the HSR. Forty-one products (41%) were found to meet the HSR healthy threshold and the company was estimated to derive over half (53%) of its 2018 sales from these healthy products.
- The company achieves an unweighted mean HSR of 2.8 out of 5. After sales-weighting the company's mean HSR slightly improves to 3.0 out of 5, resulting in a mean healthiness score of 6.1 out of 10.
- A total of 106 products were assessed to determine their suitability to be marketed to children according to the WHO SEAR nutrient profile model. Over one third (37 products), estimated to represent 44% of 2018 retail sales, were found to meet the WHO SEAR criteria. Many were identified in the Dairy and Processed Fruit and Vegetables category, whilst all products in the Edible Oils category met the criteria.

Product Category Results

Category	Dairy	Edible Oils	Ice Cream and Frozen Desserts	Processed Fruit and Vegetables
Mean HSR	3.0	3.8	2.0	4.6
% products healthy	54	67	0	100
% products suitable to market to children	39	100	0	88

- Mother Dairy performed best in the Processed Fruit and Vegetables category. Although this category represents a small proportion of the company's total sales, the seven products assessed in this category achieve a mean HSR of 4.6 out of 5. The second-best performing category for Mother Dairy is Edible Oils (3.8) followed by Dairy (3.0).

Relative nutritional quality of Mother Dairy's products by category compared to competitors

Mean HSR	Dairy	Edible Oils	Ice Cream and Frozen Desserts	Processed Fruit and Vegetables
Mother Dairy	3.0	3.8	2.0	4.6
Aavin TCMPF	2.3			
Adani Wilmar		3.1		
Amul GCMF	2.4		1.8	
Arla	3.2			
BRF	2.7			
Britannia Industries	2.2			
Coca-Cola	3.6			
Coca-Cola India	3.5			
Conagra		4.3		
Danone	3.5			
Emami Agrotech		2.8		
Ferrero	0.7			
FrieslandCampina	3.4			
General Mills	3.5		1.8	
Hatsun Agro Product	2.7		2.2	
Hindustan Unilever			2.1	
KMF Nandini	2.2		1.4	
Keurig Dr Pepper				1
Kraft Heinz	2.7			4.2
Lactalis	3.1			
Marico		2.9		
Mars	2.8			
Meiji	3.2		2.2	
Mengniu	3		2.3	
Mondelēz	2.4			
Nestlé	2.4			
Nestlé India	3.0			
PepsiCo	3.1			
Suntory	3			
Tingyi	2.7			
Yili	3.1		2.1	

- When compared to the three other companies that sell products in the Edible Oils category (as part of their top-selling categories) in India, Mother Dairy ranks first with a mean HSR of 3.8 out of 5. The company ranks joint second out of eight companies in the Dairy category with a mean HSR of 3.0 out of 5, and ranks third out of five for its Ice Cream and Frozen Desserts products with a mean HSR of 2.0 out of 5.
- Competing with other companies in three categories, Mother Dairy achieves a relative category score of 8.8 out of 10 based on its ranking within those categories.

Conclusion

- Mother Dairy ranks first in the Product Profile. The company's mean healthiness score of 6.1 and relative category score of 8.8 result in an overall Product Profile score of 7.5 out of 10.
- The portfolio and category-level results suggest that Mother Dairy has scope to further improve the healthiness of its products, mostly in the Ice Cream and Frozen Desserts category and possibly in the Dairy category. Mother Dairy is encouraged to continue its efforts to do so and to further shift its sales towards its healthy products and product categories.

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India Spotlight Index 2020

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Footnotes

1. The product categories included in the Product Profile were limited to those the company is estimated to derive most of its sales from and for which information and sales data was available. The full portfolio of the company encompasses a broader range of products. Because the company derives more than 80% of its sales from dairy products, it is assessed as part of the dairy industry segment.
2. Source: Derived from Euromonitor International's 2018 industry publications of: Packaged Food, Hot Drinks and Soft Drinks.

