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ACCESS TO
NUTRITION
INITIATIVE

Nutrition responses from food and beverage companies to the Covid-19 pandemic

Report 2: An acute response
October 2020



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Abbreviations

ATNI	Access to Nutrition Initiative	INSP	National Institute of Public Health (Mexico)
BMS	breast-milk substitutes	NCD	non-communicable disease
CDC	Centers for Disease Control and Prevention	NCDC	Nigeria Centre for Disease Control
CEPI	Coalition for Epidemic Preparedness Innovations	NGO	non-governmental organization
CGF	The Consumer Goods Forum	NRAEF	National Restaurant Association Educational Foundation
the Code	International Code of Marketing of Breast-milk Substitutes	OHSA	US Occupational Health and Safety Administration
D2C	direct-to-consumer	PAHO	Pan American Health Organization (regional agency of WHO)
FAO	Food and Agriculture Organization	PPE	personal protective equipment
FDA	US Food and Drug Administration	R&D	research and development
FIA	Food Industry Asia	SBN	SUN Business Network
FIND	Foundation for Innovative New Diagnostics	SDGs	Sustainable Development Goals
FOP	front-of-pack (labeling)	SMEs	small and medium-sized enterprises
FSSAI	Food Safety and Standards Authority of India	SOFI	<i>The State of Food Security and Nutrition in the World 2020</i> Report
GAIN	Global Alliance for Improved Nutrition	SSB	sugar-sweetened beverage
GDP	gross domestic product	SUN	Scaling Up Nutrition
IBFAN	International Baby Food Action Network	UN	United Nations
IFAD	International Fund for Agricultural Development	UNDP	United Nations Development Program
IFBA	International Food and Beverage Alliance	UNICEF	United Nations Children's Fund
IFPRI	International Food Policy Research Institute	UNSCN	UN System Standing Committee on Nutrition
IGD	Institute of Grocery Distribution	USDA	US Department of Agriculture
		WFP	World Food Programme
		WHO	World Health Organization



1. Summary

The Access to Nutrition Initiative (ATNI) is committed to improving the food industry's contribution to addressing the world's nutrition challenges. This contribution has become more evident and pressing in the face of the Covid-19 epidemic, which has increased food insecurity and revealed many unanticipated challenges for food and beverage manufacturers and their value chains.

This document is the second in a series of four quarterly reports, which together will chart the way in which food and beverage manufacturers pivot their operations in the first year of the Covid-19 pandemic, and which ATNI hopes can be used by other stakeholders to understand the industry response. As the first report in this series set out, ATNI has developed a Framework to identify action by food and beverage manufacturers in response to this crisis. This document sets out the results of an assessment by ATNI of 39 of the world's major food manufacturers, which have been included by ATNI in other Indexes (these are listed in Annex 1 below). The information gathered in this assessment has been supplemented by ongoing searches and analysis of a range of third-party sources.

Public reporting on Covid-19 by most companies is still ad hoc and a longer-term strategic shift towards greater resilience is not yet evident. But there are some patterns emerging, as this report illustrates. In addition to the impacts of the pandemic on the global population, second-quarter financial results have shown that there have been significant repercussions for the revenues of many of the companies – although there is not a clear trend, as the pandemic has affected manufacturers in different ways (depending on their product mix) and differently in different geographies. The most widely reported and instigated efforts center on the **health of the workforce** and on **donations** (which was already clear in June, when the first report was written).

Key issues on which this report focuses are:

- **Consumer trends and the financial bottom line** (section 4.1): There has been a dramatic shift in eating habits, particularly during lockdown, with a decline in eating out and takeaway and a move away from ready meals towards homecooked food, which played out in financial results of many companies. There is also increased consumer engagement on the benefits of good nutrition for individual health – for example, the perceived impact of certain product types (such as the dairy sector in Asia) in relation to immunity and Covid-19.
- **Strategic response** (section 4.2): The companies' financial reporting demonstrates a rapid reaction to the Covid-19 crisis, but an explicitly nutrition-sensitive strategic response has been much less evident. Few of the companies analyzed by ATNI have seized the opportunity to convert their initial responses on issues such as employee health and donations – typical of the early stages of the pandemic – into longer-term, targeted actions. Most reporting is limited to short sections on websites and financial reports, but ATNI acknowledges that companies' interventions might have gone above and beyond the actions that have so far been publicly disclosed.
- **Health of the workforce** (section 4.3): The food and beverage manufacturers in scope for this project employ over 2 million people worldwide. Employee safety is one of the most reported areas of corporate action in response to Covid-19, with about a third of the companies analyzed following good practice in publicly reporting on complying with national/international guidance in relationship to Covid-19 and the workplace. However, only a few companies were found to reiterate or enhance existing commitments to support parents and breastfeeding mothers in the workplace. Overall, it is not yet clear how long-lasting support for employees will be, particularly for frontline workers – for example, whether it will lead to improved pay and other standards over time.
- **Resilience in the value chain** (section 4.4): Covid-19 has put the value chains of the food manufacturers under very significant strain, but the impact for food systems has not fallen equally worldwide and in some regions supply chains have regained their resilience. Companies have published a range of initiatives to support small and medium-sized (SME) suppliers and smallholders, who need particular support during the crisis and beyond. Were all the major food manufacturers to roll these out globally, this would be likely to make a very significant difference to the ability of the value chain to withstand future shocks. However, there has sometimes been a lack of update on these schemes, and often with no indication of their duration.



- **Donations** (section 4.5): Donations – both financial and in-kind – stood out as being a frequent (and frequently reported) aspect of companies' response. Where donations are of products, it is often not clear whether these are of nutritious products. It is also often unclear how much has been donated (and amounts vary widely), whether donations have been topped up over time, or what has been the impact of the donations on the recipient communities. ATNI would welcome a structured approach to reporting on donations, which places sustainable and healthy diets at its heart.
- **E-commerce** (section 4.6): There has been a rapid shift towards e-commerce that has pushed food and beverage manufacturers to respond in innovative ways, but these do not seem to place particular focus on using e-commerce specifically to improve access to nutritious or healthy foods (for example, by prioritizing healthy products through the new direct-to-consumer delivery channels that have been established for some brands).
- **Responsible marketing** (section 4.7): Lockdown may have served to accelerate the already significant shift from traditional forms of advertising to online marketing – the impacts of which on children are much more challenging to understand, trace and regulate. Only one company has explicitly reiterated its commitment to responsible marketing to children during the pandemic.
- **Fortification, immunity and the product mix** (section 4.8): Asia, in particular, has seen a big surge of interest in products that are alleged to improve resilience, for instance dairy products and curcumin. Caution is strongly urged about any health claims made relating to Covid-19, as these can easily be deceptive.
- **Engagement** (section 4.9): There are examples of food companies influencing governments in keeping their operations and supply chains moving during lockdown, but it is less clear whether, overall, companies' approach to engagement with governments had an impact on nutrition-related policy; companies must commit to lobby on nutrition issues only in support of public health. Some companies have implemented their own Covid-19 education and public awareness programs and established new partnerships with government authorities, local and international NGOs, but it is not yet clear how this engagement will play out in the longer term.
- **Infant and young child nutrition** (including breast-milk substitutes) (section 4.10): ATNI's research found that none of the companies' websites include an explicit statement of continued commitment to the International Code of Marketing of Breast-Milk Substitutes within the context of the Covid-19 crisis – although the need for compliance is as important as ever, as breastfeeding support services have been disrupted. Some companies state that their products are safe, and that breastfeeding remains safe if precautions are taken to avoid infection, but most do not emphasize that breastfeeding remains best despite the pandemic.

The world is now more than six months into this crisis – but is just at the start of what is a unique and urgent opportunity to reorient the food system towards a more healthy, equitable and sustainable future. The food industry must ensure that it plays a key role in building back better from this global emergency.

For subsequent reports, planned for early 2021 and Q2 2021, ATNI would welcome suggestions from readers of the current report as to what aspects of the food and beverage industry's response to Covid-19 would benefit from ATNI's scrutiny or further analysis.



2. The developing Covid-19 / nutrition nexus

2.1 The global pandemic

Covid-19 continues to wreak havoc on lives around the world, and in the three months since the first ATNI report¹ its impact has shifted further into low- and middle-income countries. The trajectory of the virus has been highly variable worldwide, with some low-income countries still to see a major outbreak, but along with the United States (7.5 million cases), the countries with the most cases are India (6.7 million cases) and Brazil (4.8 million), as of 6 October 2020. There is the ongoing threat of more lockdowns, both local (as in Melbourne, Australia) and potentially nationally, as the virus ebbs and flows.

This is not a short-term crisis: even if an effective, long-lasting vaccine and/or treatment is found, this is unlikely to reach the whole global population for a significant time, and in the interim (and beyond) the world is facing a severe recession. The World Bank has forecast that global gross domestic product (GDP) will shrink by over 5% in 2020 – and that is on the assumption that measures will start to be lifted in the second half of the year, so an even greater fall may yet occur.² This will hit the poorest hardest: Africa is predicted to go into recession for the first time in 25 years, and a 5% fall in GDP could plunge 50 million people in sub-Saharan Africa into poverty, reversing the last decade of progress.³

“Coronavirus exploits and accentuates divisions and inequalities in our societies...
It strikes the poorest people hardest.”

Richard Horton, editor-in-chief, *The Lancet*, at the launch of the Lancet Commission on Reframing NCDs and Injuries for the Poorest Billion,⁴ September 2020

2.2 The impact on nutrition

The impacts of Covid-19 on food insecurity are far-reaching: unemployment and consequent reduced household purchasing power, disruption impacting on food production and supply, falling government revenues that affect protection for vulnerable populations, and political instability.⁵ A report published in July by the Food and Agriculture Organization (FAO) and other UN agencies, *The State of Food Security and Nutrition in the World 2020*, makes clear that Covid-19 is impacting on food security, with an estimated 3 billion people unable to afford a healthy diet.⁶ As the economic consequences reverberate, estimates published in the *Lancet* on child malnutrition are stark: there could be a 14% increase in wasting among children under five due to predicted economic losses due to Covid-19 – that is 6.7 million more children, bringing the total to almost 54 million.⁷ Covid-19 also disrupts optimal care for already malnourished children.⁸

‘Acute food insecurity hotspots’ have been specifically identified by the FAO and the World Food Programme (WFP) in a July report,⁹ including Bangladesh, Venezuela, Nigeria and Zimbabwe – and already fragile settings are at particular risk, such as Afghanistan and Yemen, as Oxfam warned in July.¹⁰ The Scaling Up Nutrition (SUN) Business Network has also suggested that food insecurity could rise sharply in Latin America and the Caribbean due to Covid-19 from 3.4 million in 2019 to 13.7 million in 2020.¹¹

The impact of Covid-19 is not restricted to lower-income countries. In Canada over half a million people feel food insecure because of Covid-19 and almost one in seven live in a household with food insecurity.¹² Simulations by the European Commission’s Joint Research Centre suggests that the disposable income of European households will fall by an average of almost 6% in 2020, unless policy measures are put in place to alleviate the impacts – and that the impact of the lockdown is likely to take a proportionally greater toll on those with lower incomes, leading to increased poverty rates.¹³ Almost a third of US households with children are suffering food insecurity



this year, up from one in five in 2008¹⁴ – and there are clear ethnic disparities: among households with children, 39% of black households, 37% of Hispanic households and 22% of white households are food insecure.¹⁵

Policymakers are very aware of the need to keep food supply chains open, to address food insecurity and to support producers. In India, the government's economic stimulus plans in April included 1 trillion rupees (US\$13 billion) to assist SMEs, mainly in the agricultural and food sector, including farmers¹⁶ as well as collateral-free loans and other support.¹⁷ Sometimes this action takes advantage of the unique circumstances created by Covid-19. For example the US 'Farmers to Families Food Box Program' has been partnering the US Department of Agriculture with national, regional and local distributors with surplus produce, to purchase up to \$4 billion for family-sized food boxes of fresh fruits and vegetables, dairy products and meat products, distributed through food banks, community and faith-based organizations. From its announcement in April to mid-September, around 90 million food boxes have been distributed.¹⁸

Malnutrition in all its forms is impacted by Covid-19. As recession bites, many people may turn to cheap but nutrition-poor foods under lockdown, with implications for diet quality such as micronutrient deficiency – a systematic review of studies on food intake in 25 countries following the 2008 recession found that, while the impact was mixed, *'there is consistent evidence of a negative impact on diets'* and that *'the impact was generally greater on those of lower socioeconomic position'*.¹⁹ Some consumers (as section 4.1 notes) have turned to *'comfort foods'*, which, coupled with an enforced increase in sedentary lifestyles, may contribute to increased obesity. This is particularly concerning for resilience, as there is increasing evidence that obesity and related non-communicable diseases (NCDs) such as hypertension and type 2 diabetes are risk factors for worse outcomes from Covid-19.²⁰

The obesity/Covid-19 connection is becoming a driver of research – for example, the European Institute of Innovation & Technology allocated €5 million through its COVID-19 Support Fund to agri-food start-ups that are looking to improve the health of people and planet, specifically citing obesity-related diseases (as well as carbon emissions and food waste) as concerns.²¹ It is also a driver of local and national policy: in two Mexican states, Oaxaca and Tabasco, sales of sugar-sweetened beverages (SSBs) and highly processed foods to anyone under 18 are banned, with other states planning to follow suit.²² In the UK the links between obesity and Covid-19 have been cited as a rationale behind the launch of a new Obesity Strategy.²³

Covid-19 has also shone a particularly strong light on inequity within and between countries, notably in respect of access to affordable, healthy food. There is some evidence pointing to worsening diets in poorer communities but improving among wealthier socioeconomic groups in high-income countries. For example, qualitative research in the UK suggests that children from affluent families were more likely to try more homecooked meals in lockdown and eat together as a family than those from less well-off backgrounds, and that snacking on unhealthy food disproportionately increased among children from lower socioeconomic backgrounds.²⁴

"We must step forward together with sustained action and investments on nutrition today and deny the COVID-19 crisis an intergenerational legacy of hunger and malnutrition in children."

The heads of UNICEF, the FAO, WFP and the WHO, *The Lancet*, July 2020²⁵

2.3 Opportunity and challenge

The pandemic has sent shockwaves across the food system. For the companies that produce, manufacture and sell our food, it has far-reaching implications for workforce, customers and supply chains. The need for collaboration to ensure that food security is maintained has been a priority from the start, and the role of the private sector in addressing the pandemic has been asserted many times, for example by the World Health Organization (WHO) and International Chamber of Commerce's Joint Statement from 16 March, which builds on Sustainable Development Goal (SDG) 17 on partnership: *'All businesses have a key role to play in minimising the likelihood of transmission and impact on society. Early, bold and effective action will reduce short-term risks to employees and long-term costs to businesses and the economy... ICC encourages its members to support their country's national response efforts and to contribute to the global response efforts coordinated by the WHO.'*²⁶



There are some calls for caution in engagement. Governments are cognizant of the potential for abuse by industry. For example, the UK Competition and Markets Authority wrote an open letter to food, beverage and pharma companies in late March, warning that although *'the services provided by your sectors are important to the lives of many people at the current time... we have received reports that a minority of firms in your sector are seeking to capitalise on the current situation by charging unjustifiably high prices for essential goods or making misleading claims around their efficacy.'*²⁷ In addition, a case has been made by NGOs to consider the unintended consequences and harm that can come from involvement of the food and beverage industry around promotion of unhealthy brands, even where the activities themselves may have provided essential support for local communities, government or international organizations – in other words, to what extent is this being used to secure the companies' legitimacy and brand reputation, and potentially to influence policy (see, for example, the NCD Alliance / Spectrum report cited in Annex A2.2).

As the acute phase moves into the medium- and long-term response, and companies become more structured in their actions and reporting, it will become evident how far the industry has taken Covid-19 as a genuine pivot point towards a more nutrition-sensitive and equitable future.²⁸ Companies play a strong role in building resilience, whether of employees, customers or the food system more broadly through value chains. This ability will be particularly important as the world heads into recession, combined with increasingly environmental stresses (such as wildfires in California, increased risk of flooding, and locusts in East Africa), driven by climate change. The FAO notes that reductions in national food availability caused by adverse weather tend to be more severe when they coincide with an economic downturn, which the world is currently experiencing due to Covid-19.²⁹ However, resilience in supply chains has been greater in developed countries because they are *'more capital- and knowledge-intensive'*, with exceptions including harvesting that is dependent on migrant labor.³⁰





3. Building on the Framework report

The first report in this series from ATNI detailed the Framework that ATNI has developed to assess publicly reported changes to the food and beverage industry that have arisen since the start of the Covid-19 pandemic.

Twitter acknowledgement for the first report in this series:

'Thanks to the Access to Nutrition Initiative for tracking the food donations (unhealthy or healthy) and promotional practices of food and beverage giants during COVID-19. So important to hold everyone accountable in order to Build Back Better.'

– Prof. Corinna Hawkes, Director, Centre for Food Policy at City, University of London
[@CorinnaHawkes](#)

'There is no room for complacency or inaction in dealing with the impacts of #COVID19. What are global food and drink companies doing to address the crisis? GAIN welcomes ATNI's #ATNICOVID19Framework published today.'

– Lawrence Haddad, Executive Director, Global Alliance for Improved Nutrition [@l_haddad](#)



This second quarterly report sets out how food manufacturing companies' nutrition strategies and approaches have reacted to the fast-changing Covid-19 realities over the first six months of the pandemic (to the end of August 2020). The research process is responsive and flexible, with the Framework ensuring consistency in the way in which companies have been assessed. ATNI hopes that companies (both those included in this research and others) will adopt the Framework to structure their own response to the pandemic.

Figure 1 provides a short summary of the findings to date in each category of the Framework. The Framework is available in full as Annex 1 of the first report.

The research will enable stakeholders to understand the actions of the 39 Index companies, but will not score or rank them in a quantitative way, because there is currently no clear international guidance on how food manufacturers should respond, and because any attempts to quantify changes would be out of date before publication in the face of fast-changing policy and evidence.

The first report sets out some of the emerging themes in the first weeks of the pandemic: the changing consumer and policy environment, health of the workforce, resilience in the value chain, donations and infant and young child nutrition. As anticipated, these have continued to be relevant and are elaborated upon in this second report, with additional themes added: strategy, e-commerce and direct-to-consumer marketing, responsible marketing and engagement with stakeholders. These trends can be hard to unpick, as the impact of the pandemic may manifest in different ways in different geographies and over time, making generalization difficult at this early stage.

This report also looks at the consequences of the pandemic for the bottom line of companies (section 4.1), with information drawn from second-quarter financial reporting. This has not been evenly felt, with variation according to product portfolio/mix and geography.

The first weeks of the Covid-19 epidemic were marked by a flurry of activity, with many companies publishing pages on their websites explaining their immediate reaction and with third parties tracking and collating information. However, this activity seems to have slowed: Just Food, for example, published over 350 stories on its Covid-19 news feed in the three months March to May, but fewer than 200 from June to August.

What is evident is that uncertainty remains. It is not yet clear if the pandemic will be a tipping point towards a food system that places greater value on employee, consumer and planetary health, or will revert to the old (and unsustainable) normal. This is an extraordinary opportunity to link to global moves to build back better across many systems – not just nutrition, but for health, climate change and sustainable economies. Over the next few months – and the next two reports in this series – this may become more evident.



Box 1: Research process

The research underpinning this report has been in two parts:

1. A deep-dive analysis of 39 of the world's major food and beverage manufacturers over the period from the start of the crisis to the end of August 2020.

The selected companies, which are listed in Annex 1 below, have already been assessed for ATNI's Global and Spotlight Indexes (this is explained in detail in the first report in this series). Each company's website was assessed for action being taken around Covid-19, systematically covering every category and indicator in the Framework, and information on second-quarter financial results was also researched online.

The research was divided among ATNI research analysts, each of whom recorded the company activities according to ATNI's Covid-19 Framework, which was captured in Excel. Examples were collected through examination of companies' primary websites and materials including blogs, annual and financial reports, as well as third-party sources, such as news websites. A final round of checks for relevant examples was conducted by doing extensive internet searches to locate additional information by using keywords, and cross-checks between examples recorded and those appearing in other reports or databases were conducted. A quality check was also undertaken by a single analyst to ensure that the data and examples were relevant and appropriately explained by the analysts, to ensure that the information provided is as consistent and objective as possible.

Unlike when compiling ATNI's Global and Spotlight Indexes, information for this report has not been sought under non-disclosure agreements. All 39 companies were informed about ATNI's project and invited to share additional examples or highlight examples, and 18 companies did so.

Limitations:

- a) Because this research is based almost entirely on information in the public domain (and was subject to language constraints), a lack of information about a company does not necessarily mean that a company is not taking action to address the Covid-19 crisis.
- b) In addition, ATNI research analysts primarily focused on information reported by parent companies as opposed to subsidiaries or that linked to specific brands, although activity does take place at brand level (particularly marketing campaigns, such as those highlighted in section 4.7).
- c) ATNI has also not been able to verify all the information, as resources do not permit this level of scrutiny, but third-party sources have often been used to confirm or respond to the initial research.
- d) A further limitation is that a preponderance of the information (particularly in English) has been available on developed markets (such as in the European Union and United States), rather than in emerging markets. The next report in this series intends to take a deeper dive into some of these markets, such as Nigeria, Mexico and India.

2. Since March 2020, ATNI has been compiling weekly updates on the response of food manufacturers, the wider food industry, consumers, NGOs and government to Covid-19 and its impact on nutrition. These updates have been systematically sourced from third parties (see Annex A2.1 for a list of these sources), with a more ad hoc approach on Google where there is an issue of interest, and have been used in this report to supplement the company-specific findings. There is a lack of clear standards in many areas – but where there are alleged violations of standards (such as the International Code of Marketing of Breast-milk Substitutes, known as 'the Code') then this is noted.

This process has enabled ATNI to identify and summarize the major trends over the last six months. Further monitoring of the 39 companies and of the wider environment will continue for the rest of the project duration and will inform the third and fourth reports.



Figure 1: Summary of Framework category and response (to August 2020)

Framework category	Rationale/company action needed	The first six months: the acute response
A. Governance and leadership	Integrate a Covid-19 response into corporate strategy: informing stakeholders of companies' activities and commitments improves accountability.	The majority of the companies reported rapidly on Covid-19-related activities, mostly around employee health and philanthropic actions (primarily around food security). However, the integration of a nutrition-sensitive Covid-19 approach into formal corporate strategy is currently only minimally reported. Company reporting is generally limited to, at most, a short section on company websites; how regularly these are updated is unclear. Many have only a brief mention of Covid-19 on their websites; some do not mention it at all. Some companies are also establishing scientific committees or taskforces to advise the Board.
B. Safe and healthier products	Prioritize investment in healthy, appropriate foods and beverages to ensure that products address the ongoing nutrition crisis and any additional challenges associated with Covid-19.	Some companies currently report that they include healthy products in those being prioritized for manufacture during the Covid-19 crisis, but none report prioritizing products with higher nutritional quality over others. Staples and popular brands are often the first and only products that companies choose to prioritize (for example to enable efficiencies with a reduced workforce). In addition, producers (and consumers) are increasingly interested in products that are alleged to boost immunity, such as curcumin.
C. Access and affordability	Ensure that healthier products are accessible and affordable, particularly prioritizing populations vulnerable to Covid-19 and its impacts. Donations should be for healthy products, based on need, and donated in collaboration with NGOs or governments.	Along with health and safety, donations – financial or in-kind – have been the principal response of companies to the crisis, particularly donating to key workers, food banks, to broader initiatives such as PPE provision (sometimes in partnership with government) and to NGOs. Few companies mention the nutritional value of the donations (none with reference to a nutrient profile), and some donations are of less healthy 'comfort foods'. In addition, e-commerce surged under lockdown, which may increase access for many but not reach some vulnerable groups, and there is no evidence that more healthy products have been prioritized. Companies do not seem to be using Covid-19 to focus on affordability of specifically healthy products.
D. Responsible marketing	Take particular care to ensure that responsible marketing commitments across all markets and marketing channels, including digital marketing, are upheld or strengthened during the Covid-19 crisis, especially in relation to children.	Companies have adapted their marketing to the Covid-19 crisis, including a particular focus on online marketing – and there are many examples of ways in which this does not conform with responsible marketing principles. Only one company has specifically reasserted its commitment to responsible marketing (particularly to children) during the crisis.
E. Protecting employees and promoting healthy lifestyles	Commit to implementing guidance on preventing Covid-19 in the workplace, take all steps needed to protect the workforce and support value chain partners. This should include action related to nutrition, and support for breastfeeding mothers.	Many companies report on their efforts to protect their workforce, although only some make reference to specific national or international guidance and there is little detail on any strategy, so many companies' responses appear ad hoc, with individual sites taking action. Some of the companies provide support within the value chain – for example, PPE provision or amended financial arrangements for suppliers. Workforce safety, rather than nutrition per se, is the focus and none explicitly and publicly reiterate support for breastfeeding mothers in the workplace.
F. Nutrition labeling and claims	Ensure that nutrition and health claims are not misleading, especially in relation to Covid-19.	Several companies state an interest in further involvement in fortification; some claims around 'immunity-boosting' products may not be fully backed up by current evidence.
G. Engagement	Engage responsibly and transparently with government on Covid-19, and consult appropriately with other stakeholders (e.g. industry associations / NGOs).	There is little explicit reporting to date on how companies are engaging with government on Covid-19, although there is evidence of contact through trade associations or other groups, and examples of donations to health authorities.
Infant and young child nutrition	Help to promote and support exclusive breastfeeding for the first six months of life, and continued breastfeeding for two years, during the crisis by marketing products in line with the International Code of Marketing of Breast-milk Substitutes.	Most companies do not explicitly and clearly restate the WHO's advice that breastfeeding is to be encouraged and supported during Covid-19; many focus on continuation of supply and hygiene during the pandemic. There are many examples of alleged breaches of the Code, worldwide – both through information directly aimed at mothers, and through donations of products.



4. Emerging trends

This section takes the emerging trends that were noted in the previous ATNI report (workforce health, resilience in the value chain, donations, and infant and young child nutrition) and expands on them, with the addition of five new trends (company strategy, e-commerce, fortification/immunity, responsible marketing and engagement). All are illustrated with examples. The trends are not always consistent across markets and over time, as is noted in some sections below. The information presented here is drawn from a variety of third-party sources (scanned weekly) and from the company deep-dives. The trends fall across all eight of the categories of the Framework, demonstrating that the research structure is picking up on the key actions of action by companies and is fit for purpose.

Please note that not all company actions have been included in this report; ATNI has provided illustrative examples of actions in different categories. The information found in the public domain or provided to ATNI was often insufficient to draw conclusions on potential impacts. However, ATNI hopes that the extensive references provided will allow interested stakeholders to dig deeper into the resources.

4.1 Consumer behavior and the financial bottom line

The first half of 2020 saw a global transformation of consumer behavior of extraordinary magnitude, as 4.2 billion people, representing almost 60% of global GDP, were placed under partial or complete lockdown due to governments' efforts to slow the spread of the virus.³¹ These actions significantly depleted out-of-home sales channels of food and beverages, with restaurants, cafés and canteens being forced to close to customers, while restrictions on movement outside the home, as well as the closure of convenience stores in many countries, greatly reduced 'on-the-go' consumption. With consumers confined to their homes, they had little choice but to buy and prepare food for themselves. Unsurprisingly, this experience has significantly affected many **consumers' views on food and their eating habits, such as a shift away from eating out towards homecooked food**. A survey in five western European countries showed both a dramatic decline of eating out (almost 70% eating less out-of-home) and takeaway (almost half eating less) and a move away from ready meals (around 90% of respondents eating the same or less) towards homecooked food (almost 50% of respondents eating more homecooked food). This survey was published in late August 2020, suggesting a longer-term shift that has continued beyond the initial lockdown.³²

Note that many of the trends in sections 4.1.1–4.1.4 are also illustrated in figure 2, which shows the financial impact on companies' bottom line.

4.1.1 In-home vs out-of-home demand

As a result of the lockdown and continuing restrictions on eating out and on returning to workplaces, food suitable for **at-home consumption** experienced significant surges in demand. Initially, panic-buying and stockpiling led to spikes in demand for staples with long shelf life, such as pasta, canned foods and frozen foods, a trend that continued in light of the tendency of consumers to make less frequent shopping trips.³³ Ready-to-eat products and meal kits also enjoyed higher demand, especially among consumers less confident with cooking for themselves.³⁴ This included stronger sales of sometimes less healthy but easy-to-cook 'nostalgic' foods, such as soup and macaroni and cheese.³⁵ For example, sales of Campbell's soups and broths in the United States increased by 52%.³⁶ Baking products (including dairy products) also experienced a significant boost; for example, Arla Foods' Lurpak products saw sales growth of 17.7%.³⁷

On the other hand, companies with greater reliance on **out-of-home channels**, including the food-service industry and convenience stores, were hit much harder. This is particularly the case for beverage companies, whose products are more often consumed via these channels. Coca-Cola, for example, whose away-from-home channels constitute approximately half of its total revenues, experienced a 26% decline in organic net revenues across the business.³⁸ PepsiCo,³⁹ Danone⁴⁰ and Suntory⁴¹ also saw double-digit falls in their beverage sales, while Keurig Dr Pepper also saw declines in this channel.⁴² Out-of-home food segments were also affected. Unilever saw food



service sales down by 40% and out-of-home ice-cream sales down 30%, citing damage to the tourist industry as a factor.⁴³ For Ajinomoto Group, the decreased sales from restaurants outweighed gains in the home-use market. Note, however, that companies' reporting does not generally, to date, provide granularity as to the impact on in-home versus out-of-home in different markets.

It is also important to note that such intense demand for products for at-home consumption both brought about, and was made possible by, a significant shift towards **e-commerce**, with new customers moving to online ordering in considerable numbers across both developing as well as developed markets. This expansion of e-commerce is the subject of section 4.6.

It is unclear how far such consumption patterns will return to normal as lockdown is eased. On the one hand, whereas these lockdown-related effects appear to have been most pronounced in North America (as reported quite consistently by the companies), results throughout the rest of the world were more mixed, or less pronounced. This is evidenced by the high organic net sales rates witnessed by food companies whose main market is North America, such as Conagra Brands, General Mills, Kraft Heinz, Campbell's and PepsiCo's Quaker Foods,⁴⁴ while several companies, including Nestlé,⁴⁵ Kellogg's⁴⁶ and General Mills,⁴⁷ reported lower sales growth in Europe and other regions in comparison. This may be explained by the fact that Europe and East Asia, for example, experienced their peaks in new Covid-19 cases much earlier than in the US, and thus lifted lockdown sooner,⁴⁸ leading to less exaggerated spending patterns among consumers and a return nearer to pre-Covid-19 levels.

Meanwhile, a survey by Wells Fargo in June suggests that certain behaviors are set to continue as lockdown eases, with roughly one-third of the 1,000 respondents planning to '*maintain elevated consumption for each of cereal, yogurt, soup, and pasta/mac & cheese*', and with only one third indicating that they would frequent restaurants to the same extent as previously.⁴⁹ Whether there will truly be a long-term change from the rediscovery of, as General Mills' CEO puts it, '*the joy of cooking and baking*' with the kitchen as the '*heart of the home*' remains to be seen.⁵⁰

4.1.2 Health and immunity

Another widely recognized trend is **consumer concern about the benefits of good nutrition for individual health, both because of concerns of the links between obesity and poor Covid-19 outcomes⁵¹ and because of a desire to have a healthy immune system.⁵²** A survey carried out by FMCG Gurus in April found that, of 23,000 respondents surveyed in high-income countries (including the United States and seven countries in Western Europe) and emerging economies (including Mexico, Brazil, South Africa and Indonesia), 73% plan to eat and drink more healthily as a result of Covid-19.⁵³ A Euromonitor survey found that 48% of global consumers seek natural and traditional solutions for preventing illness,⁵⁴ while in the United States a survey by Hartman Group found that 87% of adults '*use supplements or functional foods and beverages for various health benefits*'; and that consumers are looking for products to boost '*resiliency*'.⁵⁵ A number of companies have reported that their healthy products have experienced an increase in sales as a result, with Unilever reporting that its Lipton with Immune Boost has been '*flying off the shelves*',⁵⁶ and in July, PepsiCo's CEO announced the company's intention to create products that take advantage of the demand for products that are seen as boosting immunity.⁵⁷ (See also section 4.8 for issues around these products.)

A significant beneficiary of this trend has been the **dairy industry**: in China, 96% of the public think that dairy products can improve immunity and 40% have increased their consumption as a consequence.⁵⁸ The country has also seen powerful messaging from public health authorities emphasizing this positive association, such as the A Glass of Milk a Day Keeps Chinese People Healthy initiative.⁵⁹ Chinese dairy companies China Mengniu Dairy and Yili Group reported 19% and 23% sales increases over the period respectively.⁶⁰ Other companies also benefited from this trend, with Nestlé reporting stronger demand for fortified milks,⁶¹ Meiji's yogurts and functional yogurts experiencing moderate growth in Japan,⁶² and increased demand for Danone's dairy and probiotic offerings.⁶³

Concerns about the safety of meat products during Covid-19,⁶⁴ price (including due to temporary disruption in the meat industry – see section 4.4) and environmental impacts are predicted to lead to a **shift away from animal protein** in some markets.⁶⁵ In the United States, for example, plant-based meat sales increased by over 11% in 2020, a trend also seen in Asia.⁶⁶ Nestlé, meanwhile, reported that global sales of its vegetarian and plant-based foods increased by 40%, especially in the US and Europe.⁶⁷ This has been identified by some commentators as a trend that is likely to continue.⁶⁸



4.1.3 Snacking

There are, however, reported examples of trends that seem to be contradictory – for example, whether there is a shift to **healthy or unhealthy snacking**. Snacking seems to have increased, benefiting from the initial stockpiling spike and consumers' desire for *'comfort food'* amid the stress of the pandemic.⁶⁹ Grupo Bimbo, for example, states that *'42% of consumers are snacking more in quarantine and 33% are buying more savory snacks'*,⁷⁰ while Pepsi and Mondelez both saw an uptick in snacks sales (including biscuits and tortilla chips) in North America in the first quarter of the year.⁷¹ In the United States, chocolate sales rose from March, up 6.3% on the year before for the period ending on 27 June.⁷²

This trend was not reflected in all markets, however, with both Mondelez and Kellogg's reporting divergent performances of snack sales between North American and Latin American, European and Asian markets,⁷³ and Meiji reporting declining sales of confectionary (chocolate and gummy sweets) in Japan.⁷⁴ These companies cited closure of convenience stores as a factor, reflecting the prevailing pre-Covid-19 belief that snacking thrived in 'on-the-go' situations, providing convenient relief amid busy lifestyles.⁷⁵ However, Food Industry Asia suggested in July that there has been a move from unhealthy to healthy snacking as the pandemic has continued, described as *'from convenience to conscious'* (for example, increased consumption of nuts/seeds in the Philippines).⁷⁶

4.1.4 Brands and affordability

Another trend is that consumers in this period may have tended to gravitate towards **more 'trusted' brands** during lockdown. This was noted by several companies, including Nestlé in its latest financial report,⁷⁷ PepsiCo and Mondelez regarding their snacking businesses,⁷⁸ and Campbell's and Kraft Heinz regarding their more *'classic'* offerings.⁷⁹

However, with worldwide recession looming, it is unclear whether this trend will continue into the future. As spending power weakens during difficult economic times, consumers will have to prioritize **affordability over familiarity**.⁸⁰ Premium ranges are most likely to be hit first,⁸¹ but even recognized brands may not be safe from consumers trading down for own-brand retail labels. For example, in Australia, 61% of consumers believe that own-brand labels are a good alternative to the brands, up from 58% in 2017.⁸² It is also unclear whether the trend towards 'healthiness' will continue: according to a Consumer Goods Forum (CGF) study of 7,000 consumers across *'a wide range of incomes, ages, and living zones'* in seven countries (including Mexico, Turkey, China and the US), price is the *'biggest barrier'* stopping consumers from eating a healthy diet – and the study states that *'What we found will continue to be relevant long after we reach the other side of the pandemic.'*⁸³

4.1.5 The bottom line

As a result of the consumer trends explained above, all companies saw sizeable changes in their sales due to Covid-19: of the 21 largest food and beverage companies (excluding those without public financial reporting), 10 experienced changes in revenues in double-figures or high single-figures, compared to the previous year's equivalent. Even so, whereas the revenue changes reported by other companies may have the appearance of being steadier, this figure masks significant variation in performance among their different individual business segments or geographies as a result of Covid-19.

Unsurprisingly, by far the greatest determinant of companies' performances during the last quarter, as reported by the companies themselves, was their relative reliance on at-home or away-from-home sales channels reflecting the consumer trends described above. **The perceived healthiness, especially in relation to immunity and Covid-19, of certain product types also played a significant role, most markedly in the dairy sector.**

The figures in this report are taken from the companies' latest financial reports, as of August 2020 (with the exception of Yili Group, where ATNI found a more comparable figure via a news source, see the table below). Companies report their financial results in different ways, both in terms of the financial indicators they report and/or reporting timeframes. While this is a challenge to direct comparability between companies, ATNI deemed it worthwhile, in figure 2, to present the most relevant figures provided by each company for comparison, indicating where reporting practices have differed.

ATNI chose 'organic net sales' (or 'underlying sales growth') as the default sales/revenue figure: this best reflects actual changes in demand for the companies' products, as it excludes external factors such as currency fluctuations, acquisitions and divestitures. Some companies report their 'net sales' only, which includes the effects



of these external factors, and this has been indicated in the table. ATNI chose Q2 (April to June) as the default timeframe; where the companies' reporting timeframes do not match this, this has been indicated in the table in brackets. All companies provided their sales figures year-on-year (YoY).

Figure 2: The impact on the bottom line

Note: This list is of the companies in ATNI's Global Index 2021, excluding companies that are in ATNI's indexes only because of their breast-milk substitutes activities (Abbott Laboratories, China Feihe, RB) and those with no publicly available financial reporting (Lactalis, Ferrero and Mars). The full list of 39 companies assessed for this report appears at Annex 1.

Company	HQ	% revenue change Q2 April to June, YoY, organic net sales (unless stated otherwise)	Explanation (according to the companies' reporting)
Ajinomoto	Japan	-6*	While products for home use grew, sales decreased overall due to decreased restaurant sales, which is particularly important for Seasonings and Foods (-6.4%) and Frozen Foods (-6%). ⁸⁴
Arla Foods	Denmark	+2.8* (H1)	Benefited from home eating/cooking. This compensated for lost revenue from food-service sales. ⁸⁵
BRF	Brazil	+9.2*	Fueled by surging sales, especially of processed food in Brazil, which increased 13%, due to at-home consumption. Its export market was harmed by lower purchasing power in certain markets, supply-chain disruptions and lower food-service demand, especially in Europe. ⁸⁶
Campbell's	USA	+12 (May to July)	Benefited strongly from increased at-home demand in North America, with gains in soups, pasta sauces and pasta. Partially offset by declines in food service. ⁸⁷
China Mengniu Dairy	China	+19.2	Very high dairy sales in China driven by a positive association between dairy and immunity among Chinese consumers. ⁸⁸
Coca-Cola	USA	-26	Driven by significant declines in away-from-home channels, which represent approximately half of the company's revenues. ⁸⁹
Conagra Brands	USA	+21.5 (March to May)	At-home demand generated considerable sales growth in its Grocery & Snacks (+44%) and Refrigerated & Frozen (+23%) segments, slightly offset by a decline in Foodservice segment (-28%). ⁹⁰
Danone	France	-5.7*	Increased sales of dairy and plant-based offerings were offset by a 30% decline in out-of-home sales, especially of Waters. ⁹¹
Friesland-Campina	Netherlands	+0.3* (H1)	Growth in demand for dairy products was offset by out-of-home sales, lower milk prices and the impact of border closures on its BMS business. ⁹²
General Mills	USA	+16 (March to May)	Demand for at-home products (85% of its sales channels, including meals, baking, and cereal) surged by 28% in North America, offset partly by its much smaller Convenience Stores & Foodservice segment (-29%). ⁹³
Grupo Bimbo	Mexico	+19.9*	Benefited from strong sales growth of at-home products (including breads and sweet baked goods) in North America especially (augmented by favorable exchange rates). Partially offset by weak sales in the foodservice business. ⁹⁴
Kellogg Company	USA	+9.2	Sales boosted by breakfast cereals (+16%), frozen foods and waffle mixes, especially in North America. Offset partly by reduced snacks sales due to lower on-the-go demand, especially in Latin America and AMEA. ⁹⁵



Keurig Dr Pepper	USA	+2.9	Strong sales in at-home coffee and cold beverage sales offset declines in office, hospitality and convenience store channels. ⁹⁶
Kraft Heinz	USA	+7.4	Consumption-led growth in condiments and sauces and meal-oriented categories, including renewed interest in brands including Kraft Mac & Cheese, Ore-Ida, Planters, Philadelphia and Capri Sun. Foodservice fell 46%. ⁹⁷
Meiji	Japan	-5.9	Dairy business, and especially functional yogurts, increased (+7.7%) due to stay-at-home demands and increased health consciousness. However, stay-at-home demands significantly harmed its confectionary, items for professional use and pharmaceuticals businesses. ⁹⁸
Mondelēz International	USA	+0.7	Strong growth in North America especially in snacks, as well as prepared dishes and frozen foods, was counterbalanced by reduced sales in Europe and Emerging Markets, where snacking in particular was harmed by convenience store closures. ⁹⁹
Nestlé	Switzerland	+1.3	Saw strong growth in its at-home channel, including frozen foods and baking products, as well as dairy, plant-based products and immunity-boosting health products. Offset by negative growth of water and confectionary sales, due to their high exposure to the out-of-home channel and on-the-go consumption. ¹⁰⁰
PepsiCo	USA	-0.3	Soft drink business suffered due to lower restaurants and convenience store demand. Offset slightly due to strong growth in healthier at-home brands, especially Quaker Foods North America (+23%) and its juice business. ¹⁰¹
Suntory	Japan	-10.7 (H1)	Beverages and restaurant businesses suffered significantly, with the exception of sugar-free teas and supplements. ¹⁰²
Unilever	UK/ Netherlands	-1.8	Revenues harmed by lack of food service sales (-40%) and out-of-home ice cream. This was nearly offset by growth in products for home consumption, including condiments Knorr and Hellmann's, at-home ice cream (+15%) and teas. ¹⁰³
Tingyi	China	+8* (H1)	Instant noodle sales, which constitutes nearly half of total sales, increased by 29%. Beverage sales, the remaining half, decreased 4% overall, falling rapidly in Q1 and rebounding in Q2. ¹⁰⁴
Yili Group	China	+22.5* ¹⁰⁵	Very high dairy sales in China driven by a positive association between dairy and immunity among Chinese consumers. ¹⁰⁶

* Reported net sales – includes impact of currency fluctuations, acquisitions, and divestitures

4.2 Strategy

The immediate Covid-19 crisis continues to ebb and flow, but recession is looking inevitable, as noted in section 2.1 above. As the short-term moves into the medium and long term, the response to Covid-19 also becomes the response to recession and a pivot towards a new normal. Commercial strategy has clearly been adapting to the pandemic, and financial reporting for the first half of the year has reflected this, although this is often presented on investor pages of the company websites or press releases, rather than in a more user-friendly format or structured ongoing reporting on the website.

However, **an explicitly nutrition-sensitive response has been much less evident** and, in the six months since the worldwide crisis began, **few of the 39 food and beverage companies analyzed by ATNI have seized the opportunity to convert initial fast responses on issues such as employee health and donations – typical of the early stages of the pandemic – into longer-term, targeted actions.**



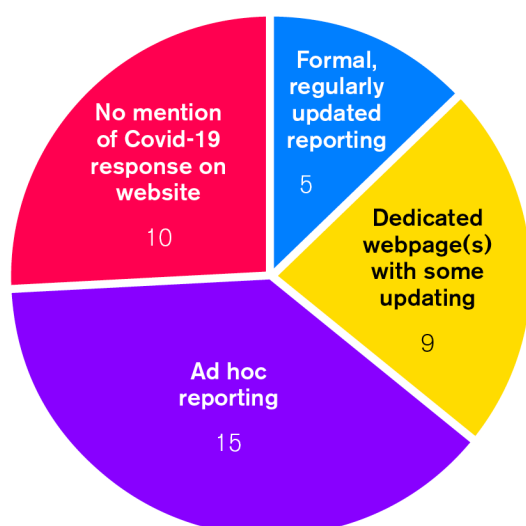
From the analysis undertaken in August 2020, most companies (where they have reported a response) have implemented their responses to the coronavirus pandemic in an ad hoc way, rather than embedding them in long-term strategies that are reported in the public domain.

Almost three-quarters of the companies (29 of the 39 in total) were found to have made public statements about their responses to Covid-19, with some specifically noting the need to reach vulnerable communities – for example, FrieslandCampina in the Netherlands states '*Especially during this period, Campina wants to bring nutritious and healthy food to the people who currently need it the most.*'¹⁰⁷

However, the majority of these statements represent **temporary, emergency actions** – particularly in employee health (see section 4.3 below) and donations (section 4.5) – rather than strategic, preventive measures that look to the longer term. In addition, many companies do not seem regularly to be updating their webpages and the flow of published stories seems to be slowing.

Given the far-reaching impact of the pandemic on every stage of the value chain,¹⁰⁸ it is notable that more than a quarter of companies (10 companies in total) had not yet publicly reported on its impact on their operations or on the company's response to Covid-19.

Figure 3: Number of companies by type of Covid-19 response reporting



Some companies, including BRF,¹⁰⁹ Danone,¹¹⁰ Nestlé¹¹¹ and Yili Group¹¹², have invested in Covid-19-specific scientific medical research, embedding public-health concerns into their operations and effectively financing prevention and treatment alongside emergency relief. Companies including Danone¹¹³ and Nestlé¹¹⁴ have also developed Covid-19 medical nutrition treatments in support of patients' recovery. This continues their ongoing strategic efforts toward positioning themselves as nutrition-driven companies – respectively, '*bring[ing] health through food to as many people as possible*'¹¹⁵ and '*applying our nutrition expertise to enhance the health and wellness of people*'¹¹⁶ – so arguably this is part of a wider nutrition-sensitive response. All research should be conducted independently.

Currently missing are reported examples of how companies' Covid-19 responses are being integrated into wider crisis-management processes. If Covid-19 can be seen as an opportunity, and arguably a responsibility, to pivot the food industry around health and nutrition, it can also be interpreted as a chance to enhance contingency plans and streamline crisis management into core processes.

- Mars has publicly noted the link between Covid-19 and crisis management: the Mars CEO, who is personally chairing the crisis-management team, stated that the company has been '*monitoring developments in real time and taking the necessary steps to do our part.*'¹¹⁷
- In January, Coca-Cola established a Coronavirus Taskforce,¹¹⁸ although the company's website does not give more details.



- As the first report in this series noted, BRF has established a multidisciplinary committee of executives and doctors¹¹⁹ – this has informed prevention and awareness campaigns internally as well as externally with the company's suppliers.¹²⁰
- Also as noted in the previous report, PepsiCo has established a scientific committee *'to assess our plans and provide input on how we can continue to operate and do our part to keep our employees safe.'*¹²¹

In the main, companies have not yet reported taking this critical moment as a chance to ensure that access to nutritious food is integrated into their strategies, during the pandemic and beyond. Grupo Bimbo, however, commits on its website *'not to increase the price of any of our products during the crisis, maintaining the prices that were in place for our entire portfolio prior to the start of the crisis'*¹²² – although it is not clear how long this commitment will remain in place. In correspondence with ATNI for this report, Danone explains that it has pivoted its Covid-19 response around the 'affordability' principle – *'one brand across different price points'*¹²³ – as a means to ensure affordable, nutritious food options to those who might lose purchasing power due to Covid-19 and thus fall into a vulnerable category. Danone also notes that it is building short-term quick wins to address the emergency by the end of 2020 and will share its long-term product / business portfolio adaptations to the *'new normal'* as part of its 2021 budget process.

ATNI acknowledges that **companies' interventions might have gone above and beyond the actions that have so far been publicly disclosed.** All companies are encouraged to commit to more extensive and transparent reporting on their strategic response, which will enable stakeholders, including ATNI, to assess their progress and ensure accountability against commitments. The sporadic nature of reporting means that it is challenging to tell what actions are planned, how long they will last and how they are embedded in strategy.

Box 2: Early responders in China

Companies' responses to the pandemic have also depended on the dynamic nature of the virus, which hit different countries at different times. The first country to be hit was China, and dairy company Yili Group has been able not only to adapt its strategy to the challenges brought about by the virus but also to build its strategy around it and report on it. It was also able to include its response in its 2019 Annual Report.

Other than donating food and hygiene supplies and investing in scientific health research, the company briefly outlined six steps to be taken in 2020,¹²⁴ including the following, which ATNI, while doing this research, also found being pursued by other companies, although not yet as part of a stated strategy:

- *'actively pursue and develop new business in the field of health food, accelerate the pace of innovation in adult nutrition products cheese, healthy drinks and other products to promote the healthy development of business'* (for fortification and immunity, see section 4.8);
- *'take the "home consumption" model as an entry point to actively explore emerging channels and new consumption scenarios and create new business models with internet technology'* (for e-commerce developments, see section 4.6);
- *'build a "global health ecosystem", integrate global supply chain resources and continuously optimize operational efficiency'* (for the companies' value-chain responses, see section 4.4).

This example is interesting because of the range of areas that it addresses, and may be an indication of strategic changes to be developed by companies in other parts of the world – although there has not, to date, been an update on how Yili Group is implementing these changes in practice and no indication of how these commitments will be tracked in the future.

Another example of early response was Master Kong (a Tingyi instant-noodle and beverage brand), which reviewed market dynamics daily and shifted away from offline, large retail channels to e-commerce and smaller local stores.¹²⁵

^{*} Information supplied to ATNI in response to the request for information for this report.



4.3 Health of the workforce

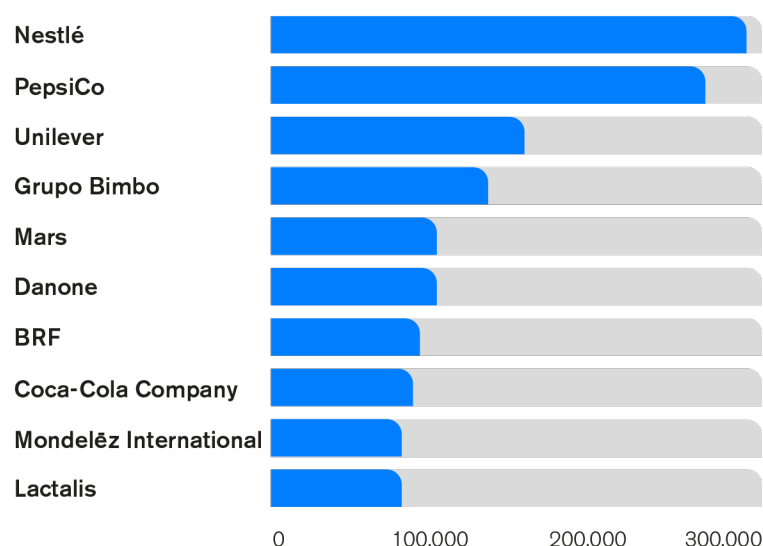
4.3.1 The scale of the challenge

In total, the 39 food and beverage manufacturers in scope for this project employ over 2 million people worldwide. Many companies have acknowledged publicly that their own front-line workers are not able to do their jobs from home, in contrast to many others in the global economy. Nestlé, for example, *'implemented enhanced safety measures at all our sites, with particular focus on our frontline workers in Nestlé factories, quality labs and distribution centers.'*¹²⁶

CEOs have been outspoken about their essential workers. Unilever's CEO thanked its workforce, *'particularly those working on manufacturing, distribution and our R&D labs.'*¹²⁷ In a video message, Ajinomoto's CEO said the company is *'working to ensure that every Ajinomoto office and plant across the globe is a safe place to work'*,¹²⁸ and Arla Foods' CEO stated that its first priority is *'to protect the health and welfare of our people – both the employees on Arla farms and colleagues working at our dairies, in logistics and in our offices.'*¹²⁹

As a result of the nature of the industry and a renewed attention to front-line workers, human rights and equity concerns, employee safety is one of the most reported areas of corporate action in response to Covid-19.

Figure 4: Number of employees of the 10 largest food and beverage manufacturers in ATNI's Indexes



Note: Abbott, which is estimated to employ over 100,000 people has been excluded from this figure as it is primarily a medical/healthcare company. Unilever also has a large non-food portfolio, so not all its employees are in the food and beverage sector.

Special attention to employee safety has been underlined by the reported outbreaks in meat-processing facilities (see box 3 for the industry response).¹³⁰ In August in California, one chicken plant was temporarily closed after eight workers died from Covid-19 and a total of almost 400 tested positive,¹³¹ and in the same month 104 employees tested positive for coronavirus in a chicken factory in Norfolk, UK.¹³² Despite no evidence that Covid-19 can be transmitted through food,¹³³ in July China suspended imports from pork and chicken facilities over coronavirus concerns.¹³⁴

However, workforce cases of Covid-19 in the food industry are not restricted to meat-processing facilities. In the United States, in March, PepsiCo confirmed multiple employees had been infected in a Quaker Oats plant in Cedar Rapids, Iowa.¹³⁵ In June, in India, Aavin (a dairy company) stepped up its measures, including implementing personal checks of every worker before entering its sites, after an employee died from Covid-19.¹³⁶ In early September, Bimbo Bakeries USA (a subsidiary of Grupo Bimbo) confirmed two employees tested positive.¹³⁷ These examples suggest companies can go beyond mandatory safety measures to protect their employees.



Of the companies in the scope of this report, about a third (12 out of 39 companies) follow good practice and publicly reported following national/international guidance in relationship to Covid-19 and the workplace. RB, for example, specifically references the World Health Organization, and has created a guide and phased approach for *'safe and healthy workplaces': 'return to the workplace is contingent on external, internal and individual issues – we will not mandate when employees should return as only they know their personal readiness.'*¹³⁸ On its careers website, Kellogg's states it has *'implemented a number of measures at our manufacturing facilities that adhere to CDC and WHO guidelines.'*¹³⁹

Box 3: Scaling up action in meat-processing facilities

In August, Reuters reported that a single unit (Toledo in Brazil's Parana state) had 1,138 confirmed Covid-19 cases.¹⁴⁰ In response, BRF scaled up its testing capacity, with a strategy to test 100% of employees *'in most critical cities and sample testing in other locations'*.¹⁴¹ In its second quarter 2020 results, the company reported having spent R\$218 million to fight the impacts of Covid-19. In September, the company announced it would replace cloth masks with PFF2 respirators for employees in Brazil as part of its agreement with the Labor Prosecution Office.¹⁴²

In the United States, according to the Centers for Disease Control and Prevention (CDC), 87% of meatpacking industry Covid-19 cases occurred among racial and ethnic minorities.¹⁴³ Therefore, in addition to protecting employee health, companies must carefully consider equity concerns among their supply chains.

4.3.2 Action to protect workers

Companies are undertaking activities to protect their workforce and to mitigate and prevent the risks of spreading Covid-19 in production facilities, distribution centers and corporate offices. For example, Danone notes that worldwide it has spent roughly US\$115 million in extra supply costs directly linked to Covid-19, including approximately \$US35 million in donations and bonuses to its 60,000 frontline employees, US\$40 million in sanitary measures and another \$40 million in extra logistics costs (including social distancing measures and warehousing adaptations).¹⁴⁴

Focus on extended sick pay is particularly important in countries in which mandated paid sick leave is minimal and where this extension goes well beyond legal requirements.






'HR is a crucial function in companies, and an empowered, resilient, healthy and safe workforce is a trend that is not likely to go away.'

Sharon Bligh, The Consumer Goods Forum (in an interview for the first report in this series)

Some of the most common and rapidly implemented measures across the different companies are summarized in figure 5.



Figure 5: Food and beverage manufacturers' actions to protect the workforce

	Implementing stringent hygienic measures, quarantine, and social-distancing measures	<ul style="list-style-type: none"> In India: Mother Dairy is ensuring that employees and other staff are screened and sanitized at the entry gates,¹⁴⁵ Marico has demarcated entry and exit shifts '<i>to avoid gathering members at the gate</i>' while it has also made available at each site a '<i>dedicated isolation room with necessary facilities</i>'¹⁴⁶ and Britannia Industries reported having set up dormitories for workers traveling from neighboring districts.¹⁴⁷ Unilever published a set of employee actions in March, which included initial '<i>must and must not</i>'s for its global workforce, including self-isolation for 14 days if experiencing symptoms.¹⁴⁸
	Provision of personal protective equipment	<ul style="list-style-type: none"> Grupo Bimbo's Technological Development team has designed and manufactured face shields and masks.¹⁴⁹ In India, Aavin provided all workers with masks, gloves and other protective equipment.¹⁵⁰
	Health checks, testing and advice	<ul style="list-style-type: none"> Globally, BRF established a 24/7 telephone line '<i>offering free medical advice to employees and their families, suppliers and outgrowers</i>.'¹⁵¹ BRF reported installing 33 thermal cameras and acquired over 2,000 thermometers to use in facilities. The company also created a Covid-19 testing team '<i>comprised of 70 people solely dedicated to conducting tests for employees at 40 different sites</i>.'¹⁵² In China, Unilever established a daily health survey on WeChat.¹⁵³ In Latin America and Spain, Grupo Bimbo is using an app that provides guidance, helping employees to monitor symptoms and contact doctors.¹⁵³
	Addressing vulnerable groups	<ul style="list-style-type: none"> Grupo Bimbo states that pregnant women and people with hypertension or diabetes, among others, have been sent home.¹⁵⁴ In March, BRF sent home 8,200 employees '<i>belonging to risk groups</i>' without an impact on salaries.¹⁵⁵
	Protecting livelihoods and bonuses for front-line workers	<ul style="list-style-type: none"> Nestlé committed to pay in full for a minimum of 12 weeks all hourly and salaried staff affected by temporary shortages.¹⁵⁶ Similarly, Unilever committed to protect its workforce '<i>from sudden drops in pay, as a result of market disruption or being unable to perform their role, for up to three months</i>'. Unilever discloses more information about its response covering '<i>employees, contractors and others who we manage or who work on our sites on a full or part time basis</i>'.

* Information supplied to ATNI in response to the request for information for this report.



		<p>However, it notes that it also applies to ‘workers not already covered by government plans or by their direct employer’.¹⁵⁷</p> <ul style="list-style-type: none"> • Danone announced it would include specific bonuses for employees working on site during the pandemic. In Spain, the company said it would pay €500 to workers in its production centers.¹⁵⁸ • In late March, Conagra Brands announced it would provide cash bonuses (US\$250–500) to employees in production and distribution facilities in the United States, Canada and Mexico.¹⁵⁹ • In India, KMF Nandini announced a doubling of salary to employees attending work during lockdown (the implications of this for employees who were concerned they were infected or who were self-isolating are unclear).¹⁶⁰
	Mental health support	<ul style="list-style-type: none"> • Some companies have set up new digital health and wellbeing programs or widened their existing ones to include Covid-19-related anxiety, building resilience among the workforce during a stressful time.¹⁶¹ • In the Philippines, Coca-Cola reported having supported 10,000 employees through the Life at Coke mental-health platform.¹⁶²

* Information supplied to ATNI in response to the request for information for this report.

It is not always evident from reporting how long some of these provisions will be in place – for example, protection against pay cuts, and whether the temporary provisions in the initial stages of the pandemic have been extended, such as Covid-19 health insurance.

4.3.4 Nutrition-specific support for the workforce

ATNI found few examples of companies reporting about nutrition-specific support to their workforce in relation to Covid-19:

- Brazilian meat and packaged food company BRF noted it ‘*implemented a weekly recognition plan for BRF employees, with added financial [sic] and food which benefitted nearly 65,000 employees*’.¹⁶³ However, it is not clear whether this initiative is still taking place or how long it lasted.
- In India, Adani Wilmar distributed ‘*more than 25,000 litres of edible oil and large quantities of food grains among people living in the vicinity of its factories*’. Additionally, the company reports that food packets were distributed among truck drivers and workers at plants at locations including Mundra, Haldia, Mantralayam, Bundi, Mangalore and Lucknow.¹⁶⁴
- Nestlé is ‘*offering free meals and transport*’ to reduce the risk of employees at factories and distribution centers of getting ill.¹⁶⁵

The Consumer Goods Forum (CGF) ‘Global Learning Mechanism’ has released Covid-19 case studies to shed light on businesses’ best practices. In its series published in June, the section on employees does not include any examples related to companies supporting employee nutrition.¹⁶⁶ Nevertheless, most of these multinational companies have reopened canteens implementing stricter safety and hygiene measures and more companies are realizing the importance of good food in attracting talent.¹⁶⁷ It will continue to be important to support and follow programs that empower employees around the world to adopt healthier lifestyles, including healthy diets – for example, the coalition between CGF and GAIN on Workforce Nutrition has a goal to ‘*impact three million employees in their organisations and supply chains by 2025*’.¹⁶⁸



4.3.5 Parental and breastfeeding support

Only a few companies were found to reiterate or enhance existing commitments to support parents and breastfeeding mothers in the workplace. In its initial Covid-19 response, Danone committed to provide extensive health coverage, including childcare for all employees worldwide, which might improve access to nutrition.¹⁶⁹ PepsiCo recognized the *'burden [that] inadequate childcare has on our associates during this time'* and the company is offering *'a minimum of two-thirds pay for up to 12 weeks, subject to approval, for associates who may be impacted by lack of available childcare due to school or daycare closures or the lack of availability of a regular caregiver because of coronavirus.'*¹⁷⁰ Nestlé is providing access to paid support *'for parents and guardians who are unable to attend work because they are the primary carer for their children in the event of a school or childcare centre closure.'*¹⁷¹ However, it is unclear if these activities are available to all employees worldwide or how long they will continue.

Box 4: Protecting vulnerable groups and ensuring business continuity

A few companies have publicly reported on their strategies to identify and send home vulnerable groups among their workforce. However, some companies fail to indicate if these employees are guaranteed paid leave and how long these programs will last.

- In the few months of the pandemic, Grupo Bimbo sent home 5,000 employees in Mexico while guaranteeing them salary and work.¹⁷²
- BRF reports having an 8,200-strong employees-at-risk group on leave and having temporarily hired 6,700 workers to either replace those on leave or support in Covid-19-related activities, such as enhanced cleaning at units.¹⁷³

In bringing in provisions to protect those in the workforce who are more vulnerable to Covid-19, such as those with underlying conditions, it is also important that these groups are not inappropriately discriminated against and human rights upheld – for example, protected against job loss.¹⁷⁴

Food companies, particularly those in India, have migrant workers who make up a significant proportion of the workforce in the industry. Lockdown measures left many migrant workers even more vulnerable, depending on daily jobs to feed their families.

- Indian edible oil company Marico worked with government agencies to provide meals and dry rations for migrant laborers.¹⁷⁵
- ITC has made *'distributing cooked meals to the needy and migrant workers'* one of its key initiatives to fight Covid-19.¹⁷⁶

While continuing to fight Covid-19, companies should protect migrant workers' rights and follow WHO guidelines, for example providing access to safe and hygienic accommodation and self-isolation facilities.¹⁷⁷

4.3.6 Next steps?

As the Covid-19 pandemic and economic crisis continues to unfold, health in the local community continues to be a clear priority, with some of the multinationals placing emphasis around actions to support local employees and communities. In some cases, this also results from companies having a large share of employees in its home market; for example, Mexico accounts for almost 60% of the total workforce for Grupo Bimbo, though the company has operations in 33 countries – and, as noted above, while the company reported having sent home Mexican workers belonging to vulnerable groups, there is no commentary on the company's website about the program taking place in different markets.

Overall, is not yet clear is how long-lasting support for employees will be, particularly for frontline workers – i.e. whether it will lead to improved pay and higher standards over time.

It will remain crucial to monitor companies' responses in the future, particularly any structural changes that are reported in future annual and corporate social responsibility reports. An example of a program that has been publicly acknowledged as being updated is Campbell's in the United States, which in March initially reported



implementing premium payments applicable to approximately 11,000 front-line workers for at least five weeks; this was later updated to state that the temporary premiums would be in place for 18 weeks.¹⁷⁸

Companies have a crucial responsibility to protect their employees and prevent Covid-19 transmission in the workplace. In addition to following national/international guidance, companies can and must find ways to innovate, share best practices and effectively communicate to protect and support their workforce and value-chain partners (see below) during the pandemic and beyond.

4.4 Resilience in the value chain

4.4.1 Why the value chain?

Covid-19 has put the value chains of the food manufacturers under very significant strain, from small-scale farmers (who may not have the means to adjust to new working-condition requirements or connect to new markets) through to large-scale retailers, and including the ‘*hidden middle*’ of small and medium-sized enterprises (SMEs) in transportation, processing, and distribution.¹⁷⁹ In April, the FAO stated that ‘*keeping all workers in the food production and supply chains healthy and safe is critical to surviving the current pandemic*’.¹⁸⁰

The pandemic has highlighted the fragility of the system and tested systemic responses to the crises. **The impact for food systems has not fallen equally worldwide and, as the first report in this series noted, in some regions supply chains have regained their resilience** – for example, a June report¹⁸¹ suggested that there was only limited evidence of impacts of the pandemic of lockdown on supply shortages or price pressures in the Asia-Pacific region, and that policy measures have been crucial in keeping the system open. However, in other countries the ‘*worst food crisis in generations*’ is being precipitated.¹⁸²

The examples in this section demonstrate the range of initiatives that have been implemented across the sector by individual companies. **Were all the major food manufacturers to roll these out globally, this would be likely to make a very significant difference to the ability of the value chain to withstand future shocks. However, there is a noticeable lack of update on these schemes, and often with no indication of their duration.** ATNI hopes that companies will report on their impact soon.

Box 5: Coca-Cola and the supply chain

In July, Coca-Cola’s chief procurement officer set out ways in which the company is working to overcome the ‘*significant impacts on our direct suppliers and further down in the supply chain*’.¹⁸³ These include:

- **engagement:** ‘*to understand supplier needs and support supply chain continuity; we work jointly on an agile reallocation of contracting volumes across global markets*’.
- **financing:** including a supply chain financing program, which has made \$1 billion available to support the cash liquidity of suppliers; and
- **simplification:** new methods for supplier compliance with standards and policies, such as remote audits and assessments using virtual technology.

In return, suppliers are expected to adhere to existing social standards (such as human rights and working conditions) and themselves to ‘*act with integrity to support resilience and livelihoods in their supply chains*’.

ATNI hopes that Coca-Cola will report on the impact of these measures on its value chain.



4.4.2 SME support

That food production systems must be '*climate-resilient and profitable at smallholder level to avert hunger and malnutrition*' is not a new concern, but it has been thrown into sharp relief by Covid-19.¹⁸⁴ **SME suppliers and smallholders need particular support during the crisis and beyond.** An FAO report included 'boost smallholder resilience' as one of its seven priorities in its *COVID-19 Response and Recovery Programme*, published in July,¹⁸⁵ and the Global Panel on Agriculture and Food Systems for Nutrition's *Foresight 2.0: Future Food Systems for People, our Planet and Prosperity* September report states that '*SMEs in the food sector in LMICs are particularly vulnerable to disruptions in markets and spending and need to be supported with access to loans, information, and digital technologies.*'¹⁸⁶

Several companies have announced support for **SME suppliers** in the value chain. In March, Unilever announced that it was making available up to €500 million of cash-flow relief for its most vulnerable SME suppliers and extended credit to selected small retail customers¹⁸⁷ – though a second-quarter company update in July noted that '*so far the levels of uptake have been low,*'¹⁸⁸ so it is not yet possible to ascertain the impact of this initiative. Danone, too, is providing €300 million in financial support around the world, including '*€250 million of available cash flow for extended payment terms and credit to farmers, suppliers and smaller customers*,' and €20 million extra for the Danone Ecosystem Fund, which was established after the 2008 financial crisis and supports '*employment, skills and employability and micro-entrepreneurship*' in the value chain.¹⁸⁹ BRF has also established a 24/7 telephone line offering free medical advice to suppliers and '*outgrowers*,' as well as the company's own employees and families.¹⁹⁰

As a subset of SME suppliers, **farmers** may be at risk of food insecurity, and they have been the focus of specific initiatives. In June, PepsiCo Thailand, Suntory PepsiCo Beverages Thailand and The PepsiCo Foundation established the Give for Hope initiative in partnership with the Raks Thai Foundation in Thailand, including Give Care to Farmers, which is providing a year's Covid-19 health insurance and PPE to almost 4,000 farmers and their families.¹⁹¹ However, it is likely that as the situation develops, support for suppliers and farmers will need to continue – as one agri-food expert from Peru put it, '*Food and cash assistance have been helpful for immediate relief, but the longer-term focus should be fixed on strengthening farmer seed systems and providing quality materials to farmers to ensure strong future harvests.*'¹⁹²

The farmers in the **cocoa supply chain** have been directly affected. For example, Mondelēz has a webpage that sets out the initial response of Cocoa Life, the company's global cocoa sustainability program, in supporting the supply chain in Indonesia, Côte d'Ivoire and Ghana. In Indonesia, in April (the most recent update to the web page) the company was working with Save the Children and a local NGO on minimizing the spread of Covid-19, including hygiene efforts and masks, and the distribution of '*food and other essential products*' (although these are not defined, nor is there an indication of the nutritional value of this food). It also reports that it is '*improving local government capacity through online "training of trainers", to raise awareness in local communities.*'¹⁹³

4.4.3 Distribution partner support

Distributors are part of the '*hidden middle*' of the supply chain,¹⁹⁴ and some of the companies in India have explicitly stated that their support extends to this group. For example:

- In India, Kellogg's extended its 100% health insurance cover to include its distribution partners in India.¹⁹⁵
- Nestlé India provided three months of Covid-19 health insurance to distributors from April.¹⁹⁶
- KMF Nandini adopted cashless transactions between milk vendors and drivers.¹⁹⁷

4.4.4 Restaurant and street vendor support

The impact of lockdown on the out-of-home sector has impacted on the food manufacturers' bottom line – particularly that of beverage companies (as noted in section 4.1). As lockdown eased, restaurants were under pressure to reopen safely and ATNI's research found several examples of support being provided by food manufacturers, for example:

- The Nestlé 'Always open for you' initiative in Europe, the Middle East and North Africa (totaling CHF500 million) is supporting the out-of-home sector through '*extended credit terms, suspension of rental fees on coffee machines and offering free products when those businesses reopen, as well as digital training schemes such as barista training.*'¹⁹⁸



- Kellogg's in the United States supported restaurants in efforts to encourage customers back through the door by providing stipends to its employees of \$100 a week to spend in restaurants, in addition to providing educational resources to help with the transition to new hygiene requirements.
- General Mills' online resources include education materials for small restaurants, with guidance on takeaway delivery services in lockdown.¹⁹⁹

Branded support has been criticized in some quarters as being 'COVID-washing' marketing strategy – for example, in Mexico protective panels supplied under the 'Mi tienda' scheme (see section 4.4.5) are Coca-Cola branded, which has led a local NGO to question whether the company is '*really protecting citizens or just its own business*'.²⁰⁰

In India, street vendors are receiving support from Nestlé, which is partnering with NGOs to support 10,000 street vendors.²⁰¹ More details have not been disclosed to date, but the company has previously collaborated with the Food Safety and Standards Authority of India (FSSAI) in training 700 street food vendors in Goa on food safety, hygiene and waste management practices.²⁰²

Box 6: Industry support for restaurant workers in the United States

In the United States, the National Restaurant Association Educational Foundation (NRAEF) has established a Restaurant Employee Relief Fund, for which it has been fundraising nationally through the Restaurant Relief America campaign. The Fund helps restaurant workers who have lost jobs and livelihoods in the Covid-19 crisis. \$21.5 million has been raised, and 43,000 people have been given with a \$500 cash grant; around half of recipients are from racial minorities and 80% have household incomes of below \$50,000. 50 companies – including Coca-Cola, General Mills, Keurig Dr Pepper and PepsiCo – have contributed.²⁰³

4.4.5 Small retailer support

Small retailers account for 40% of grocery sales in Latin America,²⁰⁴ and support for this part of the value chain is evident in two nationally coordinated industry initiatives in Brazil and Mexico.

- **Mexico:** The My Open Store, My Safe Store ('Mi tienda abierta, mi tienda segura') initiative supports small stores, setting out a plan of action around health and safety to minimize the risks from Covid-19, with weekly information sent through WhatsApp and provision of 50,000 acrylic protection screens. Participating companies include Coca-Cola, Kellogg's, Mars, Mondelēz México and PepsiCo Alimentos México. The rationale for this initiative is that these small stores provide income for 2.9 million Mexican families, with 60% of the shopkeepers being women.²⁰⁵
- **Brazil:** The Movimento Nos initiative²⁰⁶ is expected to benefit 300,000 small retailers with a total of around 1 million workers, aiming to '*help small businesses get through this moment and guarantee their reopening when the time comes*'. Support includes a guide for safe reopening and provision of 150,000 health kits (masks, alcohol gel and a good-practice booklet and posters) and the website includes useful links to government schemes and other assistance including delivery platforms. BRF, Coca-Cola, Mondelēz and PepsiCo are among the eight food and beverage companies that established the program.



4.5 Donations

4.5.1 Overview

Donations are one of the two areas (with employee health) of ATNI's research that stood out as being a frequent (and frequently reported) aspect of companies' response. The research focused on what is being donated (whether in-kind (i.e. the companies' products or PPE) or financial donations), how much was donated, where they are directed (geographically and in terms of vulnerable communities) and whether the donations were done in partnership with local NGOs and others.*

Whether the donations are noted as being 'nutritious' or 'healthy' is also noted – but there are no protocols in place for food donations (for example, to guide governments in what to request and accept) that could set recommendations for donations based on a nutrient profiling system. Donations that include unhealthy products are of concern to some NGOs – for example, the executive director of the Heart Foundation Jamaica comments that they can '*have unintended health consequences and can derail achievements made towards healthy eating practices*'.²⁰⁷ Some of the companies have longstanding relationships with the organizations to which they are donating; others seem much more ad hoc. **ATNI would welcome a structured approach to donations that places sustainable and healthy diets at its heart.**

Unsurprisingly, a significant proportion of the donations explicitly targeted vulnerable populations, including those self-isolating due to health reasons, older people, children, people who have their livelihoods threatened due to Covid-19, healthcare workers, the socioeconomically disadvantaged, ethnic minority communities,²⁰⁸ refugees, migrant laborers,²⁰⁹ small and medium food enterprises, and the police force.²¹⁰ The level of donation was very variable, with some of the global companies donating primarily in their headquartered country; others (as examples below make clear) are much more widespread.

Many companies' efforts to provide food aid and hunger relief to the most vulnerable were rapid, and some companies, such as Mondelez,²¹¹ update their donation pages online. However, **it is often unclear how much has been donated (and amounts vary widely), whether donations have been topped up over time, or what has been the impact of the donations on the recipient communities. ATNI would welcome reporting in all these areas.**

4.5.2 Food insecurity and food banks

There are numerous examples of companies donating their products or making financial donations to assist communities vulnerable to food insecurity, particularly in the first weeks of the crisis.

References to independently assessed nutritional standards are rare – an example is Kellogg's donations to Magic Breakfast (including 200,000 breakfasts to the children of key workers at school during lockdown), which are noted as meeting the UK's School Food Standards.²¹²

Some of the companies' donations mention nutrition but do not indicate how nutritional value or healthiness of the food products is defined. For example, FrieslandCampina WAMCO Nigeria plc announced its support to 100,000 Nigerian families in '*low end communities and vulnerable groups at risk of compromising their nutritional needs*,' restating its mission to '*nourish Nigerians with quality dairy nutrition*'.²¹³

There are many other examples of donations (not all of which are healthy products) to vulnerable communities. Some companies state that their donations are healthy or nutritious, for example Arla in the UK partners with Magic Breakfast and has donated milk for 4.8 million bowls of cereal for children who need a '*nutritious*' breakfast during lockdown.²¹⁴

In other cases, the nutritional value of donations may not be high: for example, in India, Britannia Industries highlights examples of in-kind donations on its Twitter feed, including providing biscuits and cake to street children²¹⁵ and migrant laborers²¹⁶ and Parle donated 30 million packets of its Parle-G biscuits to '*the needy*' over three weeks from the start of April.²¹⁷

* Donations of breastmilk substitutes are dealt with in section 4.10.



A subset of the donations to tackle food insecurity are directed to food banks and other food access organizations, which by definition serve vulnerable populations. These donations are both in-kind and a mix of product donations/cash.

- Feeding America – which has 200 food banks around the country – was a major recipient of donations, including 308,000lb of rice from Mars,²¹⁸ \$5 million from the Coca-Cola Foundation,²¹⁹ Conagra donated the equivalent of almost 8 million meals,²²⁰ General Mills Foundation donated \$5 million worth of product,²²¹ Kraft Heinz donated \$1.9 million in cash,²²² and PepsiCo Foundation has provided \$3 million in support for food delivery operations for partners including Feeding America.²²³
- In the **UK**, PepsiCo²²⁴ and Coca-Cola are supporting FareShare, a network of 11,000 charities and community groups – Coca-Cola noted that its \$600,000 will provide *‘nutritional meals for approximately 924,000 food insecure people in the UK’*.²²⁵
- Kellogg’s Better Days program contributes to food bank networks in **Asia, Europe, Latin America and North America**, as well as contributing to *‘summer hunger’* programs to help children over the summer holidays. By June, \$13 million had been donated in-kind and through financial support.²²⁶
- In **Dubai**, BRF donated products to be cooked into meals for people who lost their jobs due to Covid-19 and is part of a national 10 Million Meals campaign.²²⁷
- In **Japan**, Meiji states that in April it donated 100,000 portions of snack products to 30 organizations belonging to the Japan Federation of Foodbank Promotion Associations – these include gummies and confectionary, and nutrition is not mentioned in the reporting.²²⁸

Some companies have explicitly focused on local partnership in areas around their headquarters or factories:

- RB in Berkshire (UK) announced in July that it is supporting *‘vulnerable communities’* including food banks and community transport that delivers prescriptions. This is being achieved through a donation of over £500,000 to the Berkshire Community Foundation, which then identifies local charities and voluntary groups to provide access to essential services.²²⁹
- Danone took a local approach in the United States, donating \$300,000 of products to food-access organizations in two states where Danone North America has offices and large employee populations.²³⁰

4.5.3 Donations to key workers

Donations of food/drink to **key workers** (particularly health workers) are cited by many companies, with donations often occurring within communities local to the companies’ sites – although nutrition is not mentioned in relation to these donations and they often seem to be of less healthy products. This has come under fire from some commentators – for example, in the UK a donation of doughnuts to the Royal Free London Hospital Trust led to a Twitter storm picked up by the mainstream media, with many doctors criticizing it as a marketing ploy.²³¹

- Ferrero has donated 550 tonnes of products worldwide, to medical staff as well as to *‘children and persons in need’*. Described as *‘spreading a little happiness’*, there is no indication that nutrition has been considered.²³²
- Lactalis in France donated dairy products to health workers from the Regional Hospital Centre of Orléans, including products such as Caffé Latte (which has a low Nutriscore of E) and chocolate cake.

Many companies have provided **health product support**. This includes provision of PPE to key workers (particularly in the health sector) to overcome initial shortages and to promote greater resilience in health and other key-worker systems in the face of unprecedented and unpredicted stresses:

- PepsiCo’s local distributor in Guatemala donated facemasks to customs officials and police.²³³
- PepsiCo India funded the procurement and distribution by the Foundation for Innovative New Diagnostics (FIND) of 25,000 test kits to Indian government testing sites across the country.

Some of the food manufacturers assessed in the deep-dive for this report also have hygiene products in their portfolio. Unilever, for example, can support *‘global efforts to tackle Covid-19, contributing €100 million through donations of soap, sanitiser, bleach and food’* from its own products.²³⁴ Nestlé is supporting efforts to develop a Covid-19 vaccine through a donation of CHF 1 million to the international Coalition for Epidemic Preparedness Innovations (CEPI).²³⁵

In some cases, these donations have been specifically welcomed by governments.



- In Paraguay, a donation from Coca-Cola of PPE to the National Institute of Respiratory Diseases (including 22,000 surgical masks) was welcomed as contributing '*to the strengthening of the health system and supporting the national government*' by the Minister of Health.²³⁶
- Coca-Cola's bottling company in Ghana donated 3,000 packs of sugar-sweetened beverages to frontline staff – which was publicly praised on TV by the deputy minister of information, in front of a Coke-branded screen.²³⁷

4.5.4 Contributions to government and national Covid-19 funds

Some donations have been directly to government departments or to government-established Covid-19 funds – see figure 6.

Figure 6: Examples of food and beverage manufacturers' donations to government agencies and funds

Monetary focused	<ul style="list-style-type: none"> • Tolaram Group (Kellogg's) donated GHS1 million to the Covid-19 National Trust Fund in Ghana (in addition to products for vulnerable households during lockdown), to support the government's food assistance program and to help fund a public awareness campaign.²³⁸ In India, donors to the Prime Minister PMCareFund include ITC,²³⁹ Adani²⁴⁰ and Lactalis.²⁴¹ • Coca-Cola Beverages Africa donated UGX1.3 billion and three pick-up trucks to the Ugandan Ministry of Health, a donation that was publicly welcomed by the prime minister.²⁴²
Health focused	<ul style="list-style-type: none"> • In India, Hindustan Unilever donated 29 ventilators to government hospitals in Maharashtra.²⁴³ • In Mexico, Grupo Bimbo supported the Mexican Social Security Institute with provision of equipment and operators to support the management of medication from warehouses.²⁴⁴
Food focused	<ul style="list-style-type: none"> • Aavin supplied food packs containing cookies, flavored milk and chocolates to the Social Welfare Department to be provided to children's homes.²⁴⁵ • In the Gulf, BRF brand Sadia committed to donating 1.4 million meals across the region as part of BRF's international response. Recipients will include the Red Crescent Society in Kuwait, the Saudi Ministry of Health and Saudi Food Bank.²⁴⁶

4.5.5 Donations to UN agencies

Some of the companies note that they have made donations to UN agencies:

- The Coca-Cola Foundation has made a number of donations to the UN Development Program (UNDP), such as a \$50,000 donation in Tajikistan for PPE and hygiene products.²⁴⁷
- PepsiCo has committed \$7 million to the UN Foundation as part of the One World: Together At Home campaign,²⁴⁸ which includes \$2 million to the COVID-19 Solidarity Response Fund. This Fund was created by WHO²⁴⁹ and the private sector is called upon to donate.²⁵⁰ The Mondelez International Foundation is also listed as a supporter.²⁵¹
- Mars committed a \$2 million donation to the UN World Food Program to help transport and deliver supplies for UN agencies' response to the pandemic.²⁵²



Box 7: Partnering with the Red Cross

The Red Cross/Red Crescent national societies are a prominent partner for several companies:

- The Coca-Cola Foundation donated UGX 390 million of food relief that was distributed through the Uganda Red Cross Society to vulnerable families.²⁵³
- BRF,²⁵⁴ China Feihe²⁵⁵ and Yili Group²⁵⁶ have all donated to the China Red Cross.
- Nestlé's donations to the Red Cross include an employee-matching program: *'matching 1:1 any donations to the Red Cross and Red Crescent National Societies or Federation made by our employees.'*²⁵⁷

4.5.6 Donations tied to the purchase of branded products

There are several examples in which consumers' purchases of branded products are tied to donations. This is a grey area between philanthropy and marketing and, as such, has been criticized in some quarters – for example, the NCD Alliance, in its report on marketing during the pandemic (see Annex 2.2), describes it as *'commodifying PPE.'*²⁵⁸

- Kraft Heinz developed a set of branded masks (e.g. Mac & Cheese, Heinz ketchup and Jell-O). For each mask purchased (either as a one-off or as a monthly subscription), the online seller donated a *'medical grade mask to first responders.'*²⁵⁹
- In India, Cadbury (Mondelēz) rebranded Dairy Milk as a limited edition 'Thank You' bar, with the message in eight languages. Part of the sales proceeds were then donated towards health insurance policies for daily wage earners (such as laborers and domestic help) through a partnership with Nirmana, an NGO working with the informal sector.²⁶⁰
- General Mills developed athletics clothing featuring cereals, and the company that makes the clothes has consequently donated to support a food charity: *'In celebration of this..., Champion has made a direct donation (equivalent to 300,000 meals) to NoKidHungry.org [in the United States] to ensure kids everywhere get the breakfast they need to learn, focus and thrive.'*²⁶¹

Box 8: An example of multifaceted donations

PepsiCo's website²⁶² lists many substantial (multi-\$100K) donations delivered through partner organizations, ranging from funding for PPE for health workers to providing food and resources, including *'more than 100 million nutritious meals to at-risk communities'* (although 'nutritious' is not defined). In total, the company states that *'PepsiCo has invested more than \$60 million globally and catalyzed an additional \$59 million in funding from others.'* As already noted, this includes donations to the UN Foundation and the WHO's COVID-19 Solidarity Response Fund and to national Red Cross societies.

Donations have been made by PepsiCo to NGOs in the United States, Latin America, Europe and Central Asia. In Africa, the Middle East, India, and South Asia the main focus has been meal distribution.

In April and May, the PepsiCo Foundation also *'offered a two-to-one matching program for all employee charitable contributions to select nonprofits providing COVID-19 relief globally, contributing up to \$1 million in support to nonprofits chosen by employees.'*

The company's website also includes hyperlinks to many of the recipient organizations.



4.6 E-commerce and direct-to-consumer

4.6.1 E-commerce

The trend towards ordering groceries online has accelerated due to the Covid-19 pandemic, from a base of retail e-commerce sales of over US\$3.5 trillion worldwide in 2019.²⁶³ Originally as a response to lockdowns and to minimize visits to shops and supermarkets, e-commerce has blossomed. Euromonitor International estimated that 17% of all retail sales in 2020 will be e-commerce sales, up from 13% in 2019, globally.²⁶⁴

Nigerian-based online marketplace, Jumia, reported four-fold demand for groceries and essentials in the first quarter of 2020 compared to the previous year. Its CEO hoped the ongoing situation could *'accelerate the long-term shift to e-commerce.'*²⁶⁵ In the UK, Ocado (the UK's only entirely online supermarket) has seen its share price almost double in the period March–September.²⁶⁶ Although similar e-commerce trends are reported across markets and regions, growth rates and long-term impacts may differ: a 2019 report by IGD and CGF found that the major grocery e-commerce markets were Asia Pacific, North America, and Europe with an expected sales growth of 196%, 152% and 66% by 2023 respectively.²⁶⁷

Cultural and demographic factors can also play a key role. In Japan, for example, online grocery shopping has grown slowly partly because of a traditional *'zeal for fresh and perfectly presented produce'* – but major Japanese supermarkets have begun large-scale spending on e-commerce infrastructure.²⁶⁸ In Nigeria, Deloitte noted *'the disproportionate impact of the virus on those over 50, has brought a surge of older, first-time users to online grocery and delivery models.'*²⁶⁹ There are also suggestions in developing countries such as India that relatively high use of e-commerce is due to *'a higher proportion of digital natives in their younger populations.'*²⁷⁰

While fresh foods account for a big fraction of grocery e-commerce, packaged foods and beverages are increasingly playing a key role. For example, in China, since June, JD's online fresh food business, has increased the daily procurement volume by 200% primarily for meat, poultry, eggs, fruits and vegetables.²⁷¹ For General Mills, in some markets, such as the United Kingdom and France, 10% of all sales in some categories occur online.²⁷² Although not only selling packaged foods, Unilever reported that in the first half of 2020 *'8% of our total sales are now coming through e-commerce.'*²⁷³

This rapid shift towards e-commerce has pushed food and beverage manufacturers to respond in innovative ways. Coca-Cola's CFO noted that this period *'will prove to be an inflection point for [e-commerce] to become a much larger part in a shorter period of time... Being as good on the digital shelf as you are on the physical shelf is a really important priority.'*²⁷⁴ In April, the company stated that it was increasing investments in this channel *'to support both retailers and meal delivery services, shifting toward package sizes that are fit-for-purpose for online sales, and redeploying consumer and trade promotions toward digital.'*²⁷⁵ In September, PepsiCo hired a new global head of e-commerce and the company's CEO noted that e-commerce *'is shaping up [to be] the next great revolution in the food and beverage industry.'*²⁷⁶ Whether this will continue, forming part of a long-term e-commerce strategy, is yet to be seen.²⁷⁷

However, ATNI research reveals that examples found in news articles and reported by companies in relation to their **Covid-19 responses do not seem to place particular focus on using e-commerce specifically to access nutritious or healthy foods.** Instead, the emphasis is on improving investments in e-commerce and online marketing tools as well as a new focus on direct-to-consumer channels (see below).



Box 9: Linking SME suppliers to online services

There are some indications that e-commerce is allowing SME suppliers to be linked into the food system in new ways: for example, in India, Flipkart has developed a *'hyperlocal delivery'* grocery service linking SME suppliers with domestic supermarket chains.

In South East Asia, Unilever partnered with an e-commerce platform to launch #SupportLocal, enabling 180,000 food and beverage firms to connect online with local diners.²⁷⁸

Expanding grocery e-commerce also results in companies having to focus on improved online marketing. Coca-Cola is using *'personalized offers, food-and-beverage bundles and social commerce solutions to prompt impulse purchases online, building on deep expertise in the physical shopping environment.'*²⁷⁹ While increased access to e-commerce can improve access to and awareness of healthy foods, it can also hamper people's ability to identify the healthier options. **ATNI urges food and beverage companies to work with retailers to use e-commerce opportunities to increase access to healthy products online, to ensure accurate online nutrition labeling and implement responsible marketing techniques, particularly regarding children** (see section 4.7).

4.6.2 Direct-to-consumer

E-commerce has been taken a further step by several companies in establishing direct-to-consumer (D2C) delivery channels for some brands. Some companies, such as Nestlé, Mars and General Mills, already had direct-to-consumer channels before the pandemic; however, as noted by Just Food, because of costs and logistics this channel was in a *'fledgling state before the pandemic.'*²⁸⁰

The deep dive into 39 companies found that new examples of D2C tools are focused on popular brands, rather than with any explicit mention of increasing access to healthy options.

Figure 7: Examples of food and beverage manufacturers setting up direct-to-consumer options in response to Covid-19

Australia	<ul style="list-style-type: none"> Following a similar launch in the UK, Kraft Heinz launched an e-store in Australia, with the CEO noting the new service allows ordering <i>'bundles of Heinz products directly to your doorstep, or to someone you care about, so you and your loved ones can stay home and stay safe.'</i>²⁸¹ There is no indication that these bundles include a healthier option.
Italy	<ul style="list-style-type: none"> Parmalat, owned by Lactalis, set up a direct-to-consumer online store.²⁸²
India	<ul style="list-style-type: none"> In an effort to improve accessibility during lockdown, Aavin implemented a new program (Aavin on Wheels) to bring products closer to particular communities: <i>'to ensure that dairy products are available to consumers, Aavin has initiated the sale of its products through mobile van in Chennai. We plan to station the Aavin van outside societies/apartment complexes for 2 hours during the permitted time for carrying out sales during the lockdown,'</i> the company wrote in an Instagram post.²⁸³
United States	<ul style="list-style-type: none"> PepsiCo launched two e-commerce websites: PantryShop.com, where <i>'consumers can order specialized bundles containing PepsiCo's top-selling, pantry favorites from brands'</i> and Snacks.com, on which <i>'consumers can choose from more than 100 of their favorite Frito-Lay products from a variety of iconic brands,'</i> and included an introductory offer of free shipping if \$15 or more was spent.²⁸⁴

Companies have also reported partnerships with existing delivery mechanisms. In the UK, Nestlé partnered with delivery company Deliveroo to deliver its confectionary during lockdown.²⁸⁵ Its CEO noted that *'One of the side-*



effects of this crisis will be it will be a breakthrough event when it comes to e-commerce for food and beverages.²⁸⁶

Restaurant chains can also be a mechanism to supply packaged or staple food products: in India, ITC partnered with Dominos to deliver essential items to the doorsteps of households (wheat atta and spices including chili, coriander and turmeric powder²⁸⁷), with the partnership initially being rolled out in Bengaluru, followed by Noida, Mumbai, Kolkata, Chennai and Hyderabad.²⁸⁸





4.7 Responsible marketing

4.7.1 The marketing environment

New marketing campaigns and advertising have been launched worldwide by food manufacturers in response to Covid-19, taking into account the new realities of life during the pandemic, including an increased reliance on e-commerce. Some companies report having spent less on advertising during the lockdown period because it did not make financial sense to put resources into out-of-home advertising while people were at home.

Lockdown may have served to accelerate the already significant shift from traditional forms of advertising to online marketing – the impacts of which on children are much more challenging to understand, trace and regulate.²⁸⁹

There are burgeoning areas for online marketing, such as e-sports and gaming, on new platforms such as Twitch (time spent on this platform, which is particularly popular with young people rose by almost a quarter globally during the lockdown period²⁹⁰). For example, Kellogg's is reported to have been shifting to advertising of e-sports²⁹¹ and considering video game sponsorships to replace marketing around live sporting events.²⁹²

Concerns have been expressed about the impact of marketing of food and beverages during Covid-19 and its impact on health equity. The UConn Rudd Center for Food Policy and Obesity highlights a study that black children see more than double the number of advertisements for high-sugar and energy drinks than white children; only part of the difference can be explained by differences in the time spent watching TV, which the report suggests that high-sugar and energy drinks appear to be targeted at black youth through the purchasing of advertising time during programming with disproportionately more black viewers.²⁹³

4.7.2 Responsible marketing statement

To date, ATNI's research found that **only one company, PepsiCo, has restated its commitment to responsible marketing to children during the current crisis:**

*'As we work faster and more efficiently to get products to consumers and respond to increased food insecurity around the world, we recognize the continued importance of ensuring that we market our products responsibly. During this unprecedented time, PepsiCo continues to abide by all relevant internal policies, including our Global Policy on Responsible Advertising to Children, and all local commitments, laws, and regulations.'*²⁹⁴

4.7.3 Marketing practices

On its global website, Coca-Cola states it is '*redirecting a big part of our marketing spend for community relief programs, medical supplies and equipment during the outbreak phase, as well as developing other actions for the recovery and back-to-normal phases in markets hit hardest by the pandemic*,' including suspending advertising in the UK, Nigeria and the Philippines, suggesting this applies to both low- and higher-income settings. Coca-Cola in Africa also noted that it suspended commercial advertising in order to amplify Covid-19 messaging.²⁹⁵ It is not clear how long these commitments will be in place.

ATNI recommends that companies should commit to stop marketing products to children that do not meet the threshold for healthy products in the appropriate regional WHO nutrient profiling model or equivalent, covering all forms of media and marketing and applying to all children and youth up to the age of 18²⁹⁶ – **but the research by ATNI uncovered many examples of food marketing by companies that appear to target children with their products.**

Some companies have been providing branded activities that can be undertaken by children at home. For example, in May, M&Ms (Mars) crowdsourced completed pages from an online coloring book that would then be chosen for a commercial with a 'togetherness' theme.²⁹⁷ To access the coloring book, users had to indicate that they were 13 or over, simply by adding a date of birth – an age-gating device that is easily circumvented, as many commentators have pointed out.²⁹⁸



Other brands have been linked to child behavior at home during lockdown:

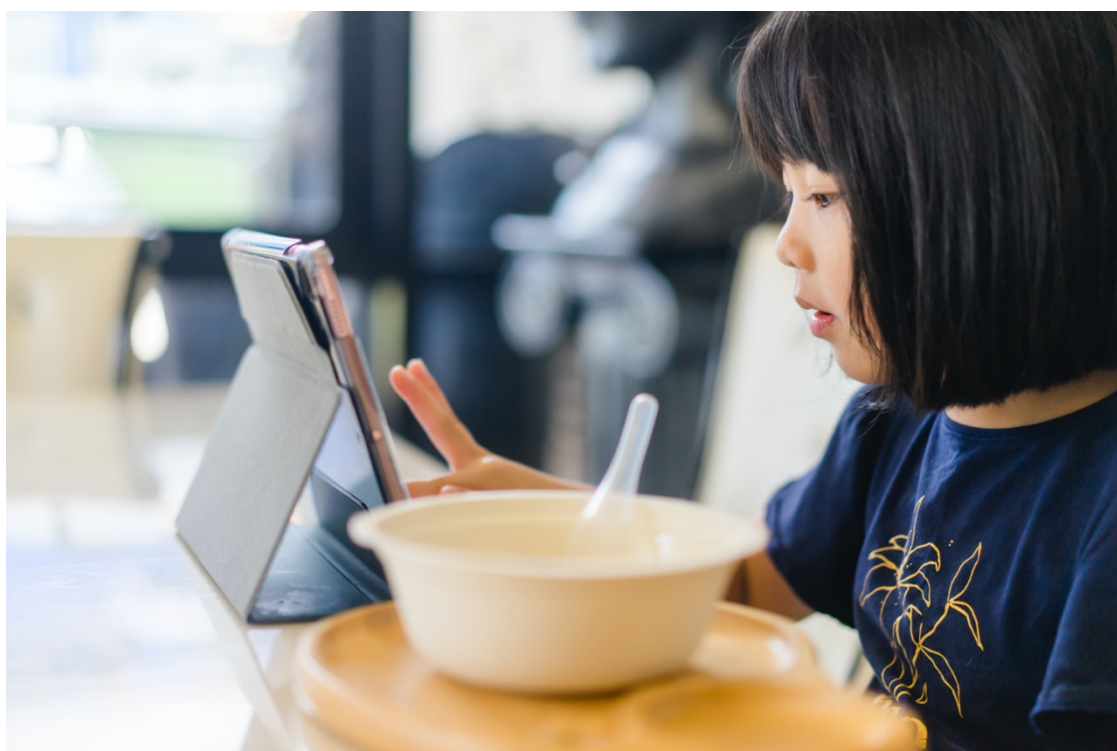
- A series of short videos from Britannia Industries center around a parent and child on a video call, where the parent tries to do a 'magic trick' with one of Britannia's products, to celebrate how well the child behaved during the quarantine. The aim is to encourage customers to send in their '*mishti [an Indian sweet] moments*' and win an online party with Indian celebrities, including cakes and biscuits.²⁹⁹
- Parle's messaging on social media included '*Hey Kids! The whole day is a recess! Pyjamas are your uniform!*', with the hashtag #StayHomeStaySafe.³⁰⁰
- A campaign by Nestlé's Munch brand and the Star India network '*celebrates the resilience of young Indians, helping their families to get through the lockdown and pandemic*', with films of adolescents helping their parents by doing chores, teaching them how to use technology etc., under the hashtag #CRUNCHKaAttitude.³⁰¹

Kraft Heinz in the United States rebranded its Mac & Cheese as a 'breakfast' product, claiming that '*serving Kraft Mac & Cheese as part of a balanced breakfast is a sure-fire way to start the day off with a smile. Kids are full and far less cranky, while parents can peacefully work from home, teach, and do the millions of other tasks required of them*' and a limited-edition 'breakfast box' of the product was available containing activities for children.³⁰² But it does not explain whether the product is nutritionally appropriate as part of a 'balanced breakfast' or whether it is a healthy product and therefore suitable for marketing to children according to ATNI's recommendations.³⁰³

Other forms of advertising that are specific to the pandemic include linking brands to working from home (such as branded Zoom backdrops) and linking product sales with donations (the latter is addressed in section 4.5.6, above).

Box 10: Covid-19 as a spur for marketing regulation

In the UK, the introduction of a new obesity strategy has been precipitated by the prime minister's concerns about the link between obesity and poor Covid-19 outcomes. The strategy includes the introduction of a ban on the advertising of food high in fat, sugar or salt on television and online before 9pm when children are most likely to see them, and a new short consultation on whether the ban on online adverts for these products should apply at all times of day.³⁰⁴





4.8 Fortification, immunity and the product mix

4.8.1 Fortification, immunity and claims

The Framework on which the research for this report was based includes the need to take an evidence-based approach to fortification and products that are claimed to improve immunity (particularly focusing on the needs of vulnerable populations) and also to safeguard nutrition labeling and health claims during the crisis. The Global Panel on Agriculture and Food Systems for Nutrition³⁰⁵ notes that regulation and prosecution for offences are needed to protect the population from fake claims, particularly any claims that fresh food can spread the virus^{*} or that dietary supplements can be used to treat it.

Danone explicitly restated its commitment to *'making only truthful, non-misleading claims based on evidence based science, grounded in the Codex Alimentarius guidance, and in all cases compliant with local regulation remains unchanged in the context of Covid-19'*.

PepsiCo's website includes the statement that: *'We recognize the continued importance of ensuring that we market our products responsibly. When communicating any functional benefits associated with our products, we continue to be governed by our Global Standards for Health and Nutrient Claims, which ensure that these claims are verifiable, substantiated and accurate.'*³⁰⁶

There are increasing numbers of products being advertised as having a positive effect on the immune system or protecting against infection, but, as the European Commission puts it: *'Scientific evidence so far does not support any claim that any food or food supplement protects against COVID-19 infection'* and *'To date, there are no authorised health claims [by the European Commission] for a food or food supplement as protecting against viral infection or boosting immunity against any virus'*. Many nutrients contribute to normal immune-system functioning (e.g. vitamins and minerals such as iron) – and health claims on this are permitted.³⁰⁷ That normal functioning requires a wide range of nutrients underlines the need for a healthy, balanced diet.³⁰⁸ Research is ongoing in this space, including promising work on the use of vitamin D to prevent or treat Covid-19,³⁰⁹ and on the use of curcumin (a flavonoid in turmeric), which is being investigated for its therapeutic properties.³¹⁰

Asia has seen a big surge of interest in products that are alleged to improve resilience, particularly dairy products and curcumin, as noted in section 4.1.2 above. In China, dairy associations worked with the Chinese CDC to develop dairy consumption guidelines that suggest that milk could improve resilience and immunity.³¹¹ In India, several companies have launched new products that are being marketed as supporting the immune response – for example, several including turmeric, which contains curcumin. The government has recommended turmeric milk be consumed³¹² – not as a cure, but as a preventative measure – although conclusive evidence on the therapeutic effects of curcumin is being sought.³¹³

- Amul launched a turmeric ice cream, claiming that this is in response to demand for immunity-boosting products.³¹⁴
- Aavin's new *'immunity-boosting buttermilk'*³¹⁵ (containing, among other things, ginger, pepper, turmeric and lemon) was launched by the Chief Minister of Tamil Nadu, with other ministers also in attendance, including the Dairy Development Secretary.

As the first report in this series noted, **caution is strongly urged about any health claims made relating to Covid-19, as these can easily be deceptive.** Industry, government and academia should work together to investigate immunity-boosting ingredients, with calls (including from governments³¹⁶) to be cautious,

^{*} In India, a myth circulated that ice cream and frozen desert could spread Covid-19, and this was quashed by the Indian government and the India Ice Cream Manufacturers' Association: see Dairy Reporter, 'Indian government and IICMA shoot down coronavirus ice cream myth' (20 July) <https://www.dairyreporter.com/Article/2020/07/20/Indian-government-and-IICMA-shoot-down-coronavirus-ice-cream-myth>

^{**} Information supplied to ATNI in response to the request for information for this report.



responsible and evidence-based in making any such claims, and companies should base claims only on scientific evidence and in alignment with regulations. Labeling standards should be safeguarded during the pandemic, and not used to mislead or deviate from labeling commitments.

4.8.2 The product mix

Some companies have been prioritizing the manufacture of specific products in the face of the pandemic – but few focused specifically on prioritizing nutrition:

- Arla Foods prioritized supply of *‘the products that are most important to people at this time,’* particularly *‘fresh dairy products, infant nutrition, cooking products, long-life milk, nutritional products for the medical sector and milk powder for countries outside Europe.’*³¹⁷
- Britannia Foods adjusted production to prioritize specific products because there was less available labor – i.e. focusing on the 20% of products that give 80% of volume (to increase efficiency), rather than prioritizing nutrition or healthy products.³¹⁸

Nestlé, however, specifically noted its intention to expand an affordable nutrition portfolio in Africa, with the Head of Nestlé's R&D Center in Abidjan, Côte d'Ivoire, cited as saying: *‘The current Covid-19 crisis around the world will lead to a further lack of affordable nutritious foods for many vulnerable consumers. We are increasing our efforts to address affordability by rapidly developing, testing, and launching safe, high-quality, affordable, nutritious products that meet the needs of sub-Saharan African consumers.’*³¹⁹ Nestlé has also been working with physicians to create a simplified algorithm and feeding protocol based on updated international guidelines (for example, medical nutrition for people in intensive care).³²⁰





4.9 Engagement with stakeholders

4.9.1 Government

Global food and beverage manufacturers have been outspoken in their support for governments in tackling Covid-19.

- In Indonesia, Yili Group stated that it recognized its responsibility to *'support the global fight against Covid-19 and help the Indonesian government and people tackle this challenge.'*³²¹
- Welcoming the measures taken by the South African government to contain Covid-19 outbreak and to maintain operations for essential businesses open (including beverages), Coca-Cola affirmed it would *'stand together with Government and all our stakeholders during this time.'*³²²

Some companies have partnered with government agencies – for example, Unilever (which has a broad portfolio including hygiene products) is working in partnership with the UK Foreign, Commonwealth and Development Office to reach up to a billion people globally through hygiene awareness and behavior change.³²³

As shown in section 4.5.4, companies have also engaged with governments through various forms of donations. Examples found through ATNI's research into 39 food companies shows that a large majority of their reported activities focus on monetary donations as well as donations of PPE and medical equipment, while examples donations of food products are more prominent at the local governance levels. **Most companies, however, fail to indicate if their donations and/or partnerships with government were in response to specific requests.** Donations have also been a way for companies to access ministers – for example, in Uruguay, the Coca-Cola Foundation met with the UNDP and the minister of health following a donation to the UNDP.³²⁴ Such access has been criticized in some quarters – for example in the NCD Alliance's crowdsourced report on corporate responses to Covid-19 – as potentially exerting inappropriate influence over policymaking.³²⁵

It was clear that food companies have tried to influence governments in keeping their operations and supply chains moving during lockdown (see also box 11).

In Kenya the government set out an official list of *'essential'* items, which included healthy foods such as water, fruits, vegetables and nuts – but also explicitly listed items including *'sugar confectionaries'*, *'processed foods'* and *'carbonated drinks'*.³²⁶ A June article published by the *Atlantic*, noted that in India Parle executives met with federal and state government officials, who eventually clarified that biscuits were considered essential.³²⁷ In April Nestlé's CEO was quoted saying that snack foods are *'just as important'* as essential nutrition.³²⁸



Box 11: Influence/engagement through industry associations

In March, industry association FoodDrinkEurope called on the European Commission to consider five action points that would help to ease pressure on the food supply chain.³²⁹ In September, the group urged European Member States *'to resist the temptation to enforce unilateral restrictions on movement of workers, goods and services'* that would impact moving skilled labor around Europe and would obstruct the sectors' *'ability to ensure a stable and safe food supply.'*³³⁰

In the United States, the Sustainable Food Policy Alliance (SFPA) was launched in 2018 by Danone, Mars, Nestlé and Unilever, with a remit to focus on *'driving progress in public policies that shape what people eat and how it impacts their health, communities, and the planet.'*³³¹ In May 2020 it sent a letter to the leadership in Congress requesting support for feeding assistance programs during the Covid-19 crisis, such as a temporary increase in SNAP (Supplemental Nutrition Assistance Program) benefits in future coronavirus relief legislation, which would benefit nutrition and stimulate local economies.³³²

Also in the United States, the Consumer Brands Association (members of which in ATNI's scope include Bimbo Bakeries USA, Abbott Nutrition, Coca-Cola Company, Conagra, Ferrero, Mondelēz, Keurig Dr Pepper, Kellogg's, General Mills, RB and PepsiCo) notes that many of the regulatory changes caused by Covid-19 should be made permanent, for example easing the 'house of service' rules for truck drivers and modernizing food safety inspections.³³³ Both the Consumer Brands Association³³⁴ and the Sustainable Food Policy Alliance (SFPA)³³⁵ have advocated for priority access to testing for essential workers.

Mexico has recently taken measures to curve alarmingly high obesity rates, from implementing a tax on sugar-sweetened beverages tax in 2014 to a front-of-pack (FOP) warning labeling system for all foods high in calories, sugars, fats and sodium, effective October 2020. However, prominent academics from the Mexican Institute of Public Health claim that obesity prevention policies *'face immediate opposition from multinational food companies'*, including more recent examples to delay the FOP system.³³⁶

These examples show that **companies must commit to lobby on nutrition issues only in support of public health**, including through industry associations, during the crisis and beyond. Results from ANTI's Global Index 2018 shows that category G (Engagement) decreased its average score from the previous Index. While companies and industry responses should continue to be monitored, the upcoming 2021 Index will shed light on companies' broader progress in this area.

Industry or trade associations also provide important mechanisms for companies to engage with government and with specific regulatory and policy proposals. There is evidence (see box 11) that companies can exert their influence in the public debate during the Covid-19 crisis through industry associations. However, it remains **unclear whether, overall, companies' approach to engage with governments had an impact on nutrition-related policy.**

Box 12: Indian companies taking action with local government to improve access to food

In April, Mother Dairy reported doubling its street shops or 'kiosks' in order to ensure supplies of essential commodities including milk and milk products. The company made special arrangements to place the kiosks at specific declared hotspots and worked with local administrators to overcome supply challenges.³³⁷

Britannia Industries worked locally to ensure that advice from central government was reflected in local government action on opening factories and depots: *'[E]ven the government was caught on the wrong foot.... because there were a lot of things which the Centre was mandating, but by the time had got to the States and by the time had got to the different departments in the State, it had a different meaning... The government machinery is so large that communication there was obviously affected during this time. We had to not just knock at the door of the Central bodies, but also the State bodies, the District Collectors, the local police, the District Magistrates etc.'*³³⁸



In addition to engaging government and NGOs, food companies through private sector partnerships and industry associations have been supporting initiatives that focus on small-shop owners and the food service sector. This support – for example, the Mi Tienda Segura and Movimiento Nós initiatives in Latin America – is explained in section 4.4.5.

4.9.2 Public education/awareness

ATNI's research has shown that food and beverage manufacturers have implemented their own education and public awareness programs in relation to the Covid-19 pandemic as well as established new partnerships with government authorities, local and international NGOs. It is not yet clear how this engagement will play out in the longer term.

Examples found through ATNI's deep dive of 39 companies show that earlier this year more emphasis appeared to support Covid-19 related programs. For example:

- In Nigeria, in collaboration with the Nigeria Centre for Disease Control (NCDC), Kellogg's (through Toleram Group) supported an awareness campaign to educate Nigerians on Covid-19 through various media channels, based on WHO guidelines.³³⁹
- In Swaziland, Coca-Cola used product labels to share health and safety messages. Similarly, in Brazil the bottles included a QR code linking to full safety guidelines on the Ministry of Health website, expected to reach over 40 million Brazilian homes.³⁴⁰
- In South Africa, Unilever adapted its hygiene education program into a gaming platform called Hygienica Castle, to help schoolchildren learn and practice good handwashing habits during Covid-19.³⁴¹
- In Brazil, BRF has a webpage dedicated to providing information about its coronavirus response. The page also includes relevant information for employees/consumers, with the Q&A section stating: *'Any more questions? If so, don't spread fake news....The Ministry of Health has a WhatsApp number for anyone to send messages with images or texts that they have received on the social media. Through this number, you can check if the information is true.'*³⁴²

4.9.3 Awareness campaigns: health, cooking and education

Some companies have built upon existing education and health awareness campaigns to take Covid-19 into account. Further monitoring and upcoming annual and CSR reports will show if companies make structural changes to existing programs to prioritize nutrition and health.

- Unilever reports that it partners with local chefs and influencers in Mexico, France, Nigeria, Italy, Spain and Portugal, offering cooking tutorials and promoting Knorr's Future 50 Foods (published in 2019 in collaboration with the World Wide Fund for Nature), which identified plant-based foods with nutritional and environmental benefits to support a more sustainable food system.³⁴³
- In India, Saffola (a Marico brand) launched a new communications/social media and awareness campaign as part of its Saffola/*life* not-for-profit initiative, to promote healthy snacking and healthy recipes during lockdown. Snackathon was developed to inspire Indian families to replace unhealthy snacking with healthier alternatives, sharing recipes online and in social media.³⁴⁴ The initiative is reported on in the company's 2019 Annual Report.³⁴⁵ This is best practice, and complements a finding in ATNI's India Index 2021 Product Profile that, out of 16 companies, Marico had the overall highest proportion of healthy products (based on the Health Star Rating nutrition profiling system), with 25 out of 41 (61%) products meeting the healthy threshold.³⁴⁶
- In April, Nestlé India launched the Maggi Cooking Made Simple campaign on the Maggi website,³⁴⁷ providing recipes in three categories: *'made easy'*, *'made with twist'* and *'made healthier'*.³⁴⁸ The *'made healthier'* options for a given recipe includes healthy tips and swaps such as *'You can also enjoy this delicious curry by replacing paneer with tofu, which has lower fat content as compared to paneer.'*
- In Spain, Danone has adapted its Fluye initiative to provide online materials for use during school closures. The program is part of Alimentando el Cambio, an initiative in partnership with Ashoka, the Ministry of Education and Spanish Society for the Study of Obesity. Fluye focuses on wellbeing and food for children aged 3–12 and uses a set of videos to give access to key messages to families and children during lockdown, displayed on TV and animated cartoons.³⁴⁹



4.10 Infant and young child nutrition

4.10.1 Covid-19 and breastfeeding: the context

As was set out in the first report in this series, during the early stages of the pandemic there was uncertainty among mothers, caregivers and healthcare professionals as to the risks surrounding breastfeeding and Covid-19 infection. These fears have been strongly allayed by research relayed by international organizations, governments and NGOs: there is no evidence that the virus can be transmitted through breastmilk, and breastfeeding is safe – and free, which is particularly relevant for those who are under financial strain.

Covid-19 has, however, disrupted breastfeeding services, and a joint message from UNICEF and WHO for World Breastfeeding Week made the point that such access is as important as ever – including protecting health care workers from the influence of the baby food industry.³⁵⁰

Compliance with the International Code of Marketing of Breast-Milk Substitutes³⁵¹ (and subsequent relevant World Health Association resolutions, including WHA 69.9, collectively known as the Code) is also as important as ever under the pressures of Covid-19. In July, UNICEF and WHO published implementation guidance on tackling child wasting through national health systems during Covid-19, which includes the recommendation that health systems *'work in close collaboration with health team management at all levels to prevent BMS donations to health facilities and health workers. The COVID-19 pandemic highlights the need for stronger legislation to protect families from false claims about the safety of BMS and aggressive marketing practices.'*³⁵²

The importance of breastfeeding and of compliance with the Code have been clearly reiterated at country level, too – for example, UNICEF in Mexico (where exclusive breastfeeding rates are low: only 25% of women in cities and 37% in rural areas) included it in a document about its importance of food vulnerability during Covid-19.³⁵³ There is ongoing concern about company action, both internationally – for example, NCD Alliance's report *Signalling Virtue, Promoting Harm: Unhealthy Commodity Industries and COVID-19*³⁵⁴ – and regionally – for example, an investigation in Peru and Mexico, published in June.³⁵⁵

In the United States, under lockdown, hospitals that had been designed 'Baby Friendly' under the Baby-Friendly Hospital Initiative (a joint program of the WHO and the UNICEF) were permitted to allow families to take home small quantities of formula upon discharge due to retail shortages in some areas during Covid-19. However, BabyFriendly USA (the national accrediting body for the Initiative, which also permitted the change) strongly criticized formula companies for seeing this as a *'window of opportunity to re-engage their aggressive marketing tactics'*.³⁵⁶

4.10.2 Company actions

ATNI monitored the websites and other online platforms of the companies that will be included in the 2021 Global BMS Index: Abbott, China Feihe, China Mengniu Dairy, Danone, FrieslandCampina, Kraft Heinz, Nestlé, RB and Yili Group. Note, however, that the research for this report was not a full assessment of these companies, as it relied only on information in the public domain and in English, and not all the companies report any response specific to Covid-19 in this context. It was not possible to check all the companies' brand websites in each market, as is the case for all companies monitored for this report.

Covid-19 is mentioned on many of the companies' websites, with messaging primarily around:

- continuation of supply, assuaging concerns about limited supply and BMS shortages, and increased reliance on online retail (continuing the e-commerce trend more broadly, see section 4.6). Abbott, for example, addresses the issue of limited stock by urging customers *'to purchase only what they need in the near term ... reminding parents who have a choice to consider leaving goods on the shelves for those who need them to ensure that no baby goes hungry'*,³⁵⁷ rather than by promoting breastfeeding;
- reassurance around hygiene practices of production and preparation of baby formula (food safety) and transmission through product packaging; and
- dealing with consumer concerns on making home-made/diluted formulas during shortages.



The ATNI Covid-19 Framework, on which the research for this report was based, focuses on specific key areas in which companies should take positive action: active support for breastfeeding, explicitly restating the commitment to the Code during the emergency, and upholding the Code throughout their business.

4.10.3 Support for breastfeeding

ATNI's research found that while a few companies state that breastfeeding remains safe, only one of the companies monitored has taken the opportunity afforded by Covid-19 to emphasize that breastfeeding is best even within the context of the Covid-19 pandemic.

Websites for RB's brands Nutramigen and Enfamil both have dedicated Covid-19 sections that reiterate that breastfeeding is best, even during Covid-19. Nutramigen's FAQs section explains that there is no current evidence suggesting that the virus can be transmitted through breastmilk and that the benefits of breastfeeding outweigh any potential risks,³⁵⁸ and Enfamil's website includes a statement that, even if a mother is infected, breastfeeding remains the best option for the baby, and that appropriate precautionary measures to prevent respiratory infection can be taken.³⁵⁹

ATNI encourages other companies to follow this example with strong statements in support of breastfeeding and referencing the WHO guidance on the safety of breastfeeding.

4.10.4 Explicit commitment to the Code

Despite the global pandemic, and the concerns of mothers (which are fully addressed by the WHO in its guidance),³⁶⁰ many brand websites do not mention Covid-19. As noted above, those that do address product availability concerns and hygiene practices rather than the WHO guidance.

Moreover, **none of the companies' websites include an explicit continued commitment to the Code within the context of the Covid-19 crisis** – and (as section 4.10.5 notes) many companies' actions have not complied with the Code in recent months.

4.10.5 Upholding (or contravening) the Code

This section sets out examples of both good practice (acting in line with the Code) and poor practice, using evidence drawn from the companies' own websites and from third-party sources. (Some companies have not reported responses that are relevant to this section, nor were examples found in third-party sources.) There have been many allegations of violations of the Code – although it is not possible to say whether violations have increased under Covid-19, because there is no baseline from which to measure the number and it is not possible independently to corroborate many of the allegations. Many of these apparent violations of the Code and WHA resolutions center around product donations (see box 13), product promotions and 'educational' outreach on Covid-19 and infant feeding.

Box 13: BMS donations

The Code is clear that donations of BMS are prohibited in all circumstances – but there are examples of companies that have apparently made product donations during the Covid-19 crisis.

Abbott's nutrition news section outlines the support the company is providing to vulnerable communities affected by the Covid-19 pandemic by '*donating Similac infant formula – a total of 1.5 million feedings – to seven Feeding America food banks across the nation*'.³⁶¹

Plasmon, a brand owned by Kraft Heinz in Italy, donated €700,000 of products, including infant formula, for low-income families affected by Covid-19. IBFAN Italia wrote a letter to the Ministry of Health and other institutions, pointing out that this action contravenes the Code and goes against the recommendations of the WHO and UNICEF. It also called on the company to withdraw its product donation and instead give the same sum to the Department of Civil Protection.³⁶²



a) Danone

Company website:

- In the UK, Danone's Aptaclub portal targets parents of babies *'born into the pandemic'*, with a page entitled *'United with new parents'* presenting *'support and scientific-led guidance'* for pregnant women and new parents.³⁶³ It is possible to contact midwives and nutritionists over the phone 24/7. A *'Breastfeeding is best for babies'* notice pops up when visitors first enter the site, which addresses all points of Article 4.2 of the Code. However, the existence of such a club, through which the company directly contacts and provides advice to mothers and caregivers, is not in line with the recommendations of the Code.

Third-party sources:

- **Brazil:** Nutricia (a brand owned by Danone) invited parents to access a free app to enable them to reach out to health experts to ask them questions related to Covid-19.³⁶⁴
- **Indonesia and the Czech Republic:** Women taking part in Danone's social media *'mombassadors'* program are offered regular training, including classes on nutrition and child development, writing social media content and recording vlogs. They are then encouraged to host parenting events, some at government-run health centers, and publish posts promoting online the company's SGM brand. The company does not cover the cost of transportation to participants' classes and does not pay the mothers directly for their branded social media posts.³⁶⁵

b) China Feihe

Third-party source:

- China Feihe is reported as having launched an online medical consultation service in China, in partnership with an online healthcare platform We Doctor Holdings. This offers customers free medical advice without having to leave their homes, explicitly saying that it provides an opportunity to directly contact consumers and build a *'bond'* with them, which the Code prohibits. In an article dated 13 February, it was suggested that more than 1 million consultations had already been provided through the service.³⁶⁶

c) FrieslandCampina

Third-party source:

- FrieslandCampina's operation in China, Friso China, reportedly reacted to customers' fears about supply of *'nutrition products'* to encourage online registration and uptake of coupons. *'There are indications that most Chinese moms are worried about their babies running out of nutrition products, and new customer recruitment offers will increase the probability of direct conversions, particularly those moms who have switched from offline to online purchase channels out of necessity.'*³⁶⁷ Friso China registered new customers into its CRM program through e-commerce incentives (discount coupons), commenting *'This is very effective for the infant formula category, because if you have the consumer's information at the get go, you are able to remarket to them.'*³⁶⁸ Using techniques like this to make direct contact with consumers and offering coupons is not permitted under the Code.

d) Nestlé

Company websites:

- Wyeth Nutrition (a company owned by Nestlé in the Philippines) is the only example found by ATNI in its research for this project of a statement on a company's website relating to baby-milk donations in light of the Covid-19 pandemic. The statement notes that the company continues to uphold and protect the Philippine Milk Code, which includes breastfeeding promotion and regulated BMS marketing, publicly justifying their refusal to honor a request for donations of baby milk products.³⁶⁹
- On the website of Nestlé's US brand Gerber, the company denies rumors of giving away free formula in response to retailers running out of stock. However, the company provides information on how to access Gerber coupons, which is not in line with the Code.³⁷⁰



Third-party sources:

- Nestlé has also been reported to be promoting formula on its social media platforms. In Indonesia, Nestlé's brand Dancow is running ads featuring straplines such as '*Bunda, Lindungi Si Buah Hati*' ('Mother, protect your sweetheart') next to images of children drinking formula.³⁷¹
- In Mexico, FEMSA (a Coca-Cola bottler) and YSA Pharmacies offered to gift Nestlé formula to vulnerable families for every can purchased from mid-May to mid-June.³⁷² The director of Mexican consumer NGO El Poder del Consumidor commented on this in the NCD Alliance's report on marketing during Covid-19:

*"The promotion of breast-milk substitutes by Nestlé, FEMSA and YSA Pharmacies not only breaches the Code of Marketing of Breast-milk Substitutes, but illustrates the way many food and beverage companies have been utilizing the COVID-19 pandemic to position their products, generate a positive image for their brands and frame themselves as "part of the solution", all at the risk of both compromising the health of young children and violating this internationally agreed Code."*³⁷³

e) RB

Company websites:

- On its company website, RB denies rumors on online social networks that it is distributing free formula. However, the main Enfamil brand website directs consumers to a program where they can receive Enfamil baby formula coupons, special offers and other savings: '*Join Enfamil Family Beginnings: Get up to \$400 in free gifts, plus a chance to win free formula for a year!*' Such promotions are in direct contravention of the Code.³⁷⁴ The company's own published policy commits it not to undertake such promotions in higher-risk countries in relation to its infant and follow-on formulas, it does not extend that prohibition to so-called '*lower-risk countries*' (i.e. developed markets).

Third-party website:

- Mead Johnson (an RB brand) reportedly '*tested its target audience in China by segmenting it into different pools and analysing their reactions to different activations and ad formats*', testing a message about protection (Chinese mothers being concerned about babies' safety) and a message about free delivery, meaning that parents need not leave the house. Its campaign '*reached over 100 million impressions that led to 1.4 million clicks on Mead Johnson's e-commerce websites*'.³⁷⁵ Directly targeting and contacting consumers in this way is in direct contravention of the Code and RB's own BMS marketing policy.

Box 14: BMS Call to Action

The Breastmilk Substitutes Call to Action was launched on 25 June 2020 by eight CSOs and UN agencies, inviting all BMS manufacturers to make a public commitment to achieve full compliance with the International Code of Marketing of Breast-milk Substitutes and all its subsequent resolutions by 2030.³⁷⁶ The manufacturers had until 25 September to submit their responses – 16 responses were received. Companies are also expected to disclose, by the end of 2020, a concrete plan setting out how they intend to achieve compliance by 2030.

The Call to Action does not explicitly reference Covid-19, but the pandemic has reinforced how essential it is to drive up breastfeeding rates around the world and for BMS companies to demonstrate their commitment to supporting this goal by adhering fully to the Code and supporting national governments' efforts to adopt Code-aligned policies and regulations.



5. Next steps

5.1 Communication and feedback: webinars

As a follow-up to this report, ATNI will host a series of webinars to further explore some of the key themes presented and give stakeholders the opportunity to digest the content and find out how best to utilize the findings. A series of webinars are planned for the end of October / start of November 2020, aimed at three stakeholder groups: 1) companies, 2) relevant nutrition stakeholders and 3) investors.

ATNI relied on publicly available data for this report, so an explicit objective of these webinars is to check whether the research process identified all important responses, particularly in terms of key findings on consumer behavior, fortification, value chain resilience, donations and breastmilk substitutes. ATNI also hopes to gather information for the next reports on the differential impact of Covid-19 on different markets, for example consumer reactions in developed markets versus emerging markets.

The webinar for companies will also provide an opportunity to talk through the findings of the report and research process, to encourage companies to provide more information to inform the third and fourth reports in this series, and to prompt them to use ATNI's findings as they continue to respond to the Covid-19 crisis. Finally, ATNI hopes that the webinars will provide valuable perspectives and insights from specific regions.

A summary of the outcomes of the webinars will be included in future reports in this series.

5.2 Future reports

For future reports, ATNI would welcome suggestions from readers of the current report as to what aspects of the food and beverage industry's response to Covid-19 would benefit from ATNI's scrutiny or further analysis.

5.2.1 Third report (Q1 2021)

The third report will take a different approach. Rather than providing an update explicitly on the themes, it will look at the response to the pandemic in different geographies. It will draw on in-country experience, third-party sources such as those listed in Annex A2.1, on a series of interviews (with, for example, in-country contacts), and on the responses that ATNI has to the webinars on the Covid-19 Framework and first two reports (planned for the latter quarter of 2020):

- ATNI will use its contacts to inform **case studies on three developing markets** where the response has been evident and informative – India, Nigeria and Mexico – looking at the differential responses of government and food manufacturers to Covid-19, including regional differences. ATNI's contacts here include the SUN Business Networks in these markets, who will be able to provide insights into in-country realities and provide a good understanding of the first nine months of the crisis.
- ATNI is aware of activities by **industry associations** worldwide to support their members with Covid-19 related advice and services, and ATNI hopes to look at this in greater detail, including within the countries chosen for the deeper-dive investigation.

5.2.2 Fourth report (Q2 2021)

The final report will be an opportunity to take stock of the impact of the first year of the pandemic, including light-touch searches of the websites of the 39 companies for updates in their actions over the six months since the deep-dive was undertaken in August 2020. This will include at least some information drawn from 2020 annual reports, but many companies' annual reports are not expected to publish in time to be included.

A particular focus will be the **impact on equity**: how Covid-19 has exacerbated existing inequalities and introduced new ones – including socioeconomic inequity, or issues around gender, race or age – and how the food manufacturers have responded and can respond further. It is also anticipated to include **investors' reactions**



to the Covid-19 pandemic, as this will help to determine the future trajectory of the food manufacturers. By the time the final report publishes, it will be a year since the virus first emerged worldwide.

By pulling together examples of best practice from the previous three reports, ATNI will be able to show what the food manufacturers can do to make a difference, and provide direction for the industry on positive ways forward as the world heads into the new normal of 2021 and beyond.





Annex 1: The 39 companies included in the deep-dive research

Companies	HQ	Employees	ATNI Global Index 2021	ATNI US Index 2021	ATNI India Index 2020	BMS 2021*
Abbott Laboratories Inc.	USA	107,000				●
Adani Wilmar Ltd	India	1,600			●	
Ajinomoto Group	Japan	32,500	●			
Arla Foods AmbA	Denmark	11,800	●			
BRF SA	Brazil	90,000	●			
Britannia Industries Ltd	India	2,100			●	
Campbell Soup Company	USA	18,100	●	●		
China Feihe	China	5,600				●
China Mengniu Dairy Co.	China	38,000	●			●
Conagra Brands	USA	18,000	●	●		
Danone SA	France	100,000	●	●		●
Emami Agrotech Ltd	India	25,000			●	
Ferrero Group	Italy/ Luxembourg	12,700	●			
General Mills, Inc.	USA	35,000	●	●		
Groupe Lactalis SA	France	80,000	●			
Grupo Bimbo, SAB de CV	Mexico	133,000	●			
Gujarat Cooperative Milk Marketing Federation (Amul)	India	1,000			●	
Hatsun Agro Product Ltd	India	1,800			●	
Inner Mongolia Yili Industrial Group	China	59,000	●			●
ITC Ltd	India	27,300			●	
Karnataka Co-operative Milk Producers' Federation Ltd (KMF)	India	5,000			●	
Kellogg Company	USA	31,000	●	●		
Keurig Dr Pepper	USA	26,000	●	●		
Marico Ltd	India	1,600			●	
Mars, Inc.	USA	100,000	●	●		
Meiji Holdings Co., Ltd	Japan	10,600	●			
Mondelēz International, Inc.	USA	80,000	●		●	
Mother Dairy Fruit & Vegetable Pvt Ltd	India	3,500			●	
Nestlé SA	Switzerland	291,000	●	●	●	●
Parle Products Pvt Ltd	India	50,000			●	
PepsiCo, Inc.	USA	267,000	●	●	●	
Reckitt Benckiser Group plc (RB)	UK	40,000				●
Royal FrieslandCampina NV	Netherlands	23,800	●			●
Suntory Beverage & Food Ltd	Japan	40,210	●			
Tamilnadu Co-operative Milk Producers' Federation Ltd (Aavin TCMFP)	India	6,700			●	
The Coca-Cola Company	USA	86,200	●	●	●	
The Kraft Heinz Company	USA	38,000	●	●		●
Tingyi Cayman Islands Holding	China	54,210	●			
Unilever plc/NV	Netherlands/UK	155,000	●	●	●	

* Companies that manufacture breast-milk substitutes (BMS) and/or complementary foods (CF), selected for ATNI's BMS/CF assessment 2021.



Annex 2: Sources

A2.1 Information repositories and other third-party sources

As for the first report in this series, ATNI gleaned information weekly from a range of third-party sources, listed below. A key source this quarter has been the NCD Alliance/Spectrum research (see Annex A2.2), which provided a unique, crowdsourced insight into company action from NCD Alliance supporters worldwide.

Bakery and Snacks ³⁷⁷	FoodBev ³⁸⁹	New Food Magazine ³⁹⁹
Business Fights Poverty ³⁷⁸	FoodPolitics ³⁹⁰	Nielsen ⁴⁰⁰
Consumer Goods Forum ³⁷⁹	FoodTank ³⁹¹	Rudd Center for Food Policy and Obesity ⁴⁰¹
Devex ³⁸⁰	Global Nutrition Cluster ³⁹²	SUN (Scaling Up Nutrition) ⁴⁰²
Euromonitor ³⁸¹	International Baby Food Action Network (IBFAN) ³⁹³	UNICEF ⁴⁰³
Food and Agriculture Organization (UN) ³⁸²	International Food and Beverage Alliance (IFBA) ³⁹⁴	UNSCN ⁴⁰⁴
Food and Land Use Coalition ³⁸³	International Food Policy Research Institute (IFPRI) ³⁹⁵	US RTK ⁴⁰⁵
Food Drink Europe ³⁸⁴	Just Capital ³⁹⁶	World Business Council on Sustainable Development ⁴⁰⁶
Food Industry Asia (FIA) ³⁸⁵	Just Food ³⁹⁷	World Food Program ⁴⁰⁷
Food Navigator ³⁸⁶	NCD Alliance/SPECTRUM ³⁹⁸	World Health Organization ⁴⁰⁸
Food Navigator Asia ³⁸⁷		World Obesity ⁴⁰⁹
Food Navigator USA ³⁸⁸		

A2.2 Selected guidance and reports

July 2020

Chatham House, *The Business Case for Investment in Nutrition*⁴¹⁰ (8 July)

- 'Businesses have a vital role to play in improving nutrition, both in the workforce and in the community.' This report present economic analysis on the direct costs of certain forms of malnutrition in the adult workforce in terms of reduced productivity in low- and middle-income countries. 'Countries collectively lose between \$130 billion and 850 billion a year... Despite substantial impacts, companies routinely overlook or underestimate the cost of malnutrition to their operations and are failing to sport the opportunities to drive action to improve diets and related health outcomes.'
- 'With the approach of key summits and events, and "resilience" high on the agenda as a result of COVID-19, the next 18 months offer a window of opportunity for business engagement on nutrition.'
- This report identifies three areas for corporate action:
 1. Commit to improving nutritional outcomes of all employees and suppliers.
 2. Seek out partnerships to deliver improved nutrition to communities.
 3. Commit to full transparency and good governance around corporate action on nutrition.

FAO, IFAD, UNICEF, WFP and WHO, *The State of Food Security and Nutrition in the World 2020: Transforming Food Systems for Affordable Healthy Diets*⁴¹¹ (13 July)

- This flagship report includes policy recommendations towards strengthening the resilience of food systems against Covid-19 shocks including:
 - Step up direct support to smallholders to enhance their productivity, reduce pre-harvest and post-harvest losses, and ensure access to food markets, also through e-commerce channels.



- Scale up 'double-duty actions' in the Covid-19 response to reduce negative impacts on food security and nutrition.
- Consider initiating and/or maintaining food fortification programs in line with international guidance to counteract worsening diet quality during the pandemic.
- The food industry should ensure that Food Safety Management Systems are installed based on the Hazard Analysis and Critical Control Point principles to manage food safety risks and prevent food contamination.

FAO, *FAO Response and Recovery Programme*⁴¹² (14 July)

- This new comprehensive COVID-19 *Response and Recovery Programme* is aimed at preventing a global food emergency during and after the COVID-19 pandemic while working on the medium to long-term development response for food security and nutrition.
- The agency is calling for \$1.2 billion in initial investment to support the needs of the new program.
- Seven priority areas FAO has developed:
 1. Reinforce a Global Humanitarian Response Plan for COVID-19
 2. Improve data for decision-making
 3. Ensure economic inclusion and social protection to reduce poverty
 4. Bolster trade and food safety standards
 5. Boost smallholder resilience for recovery
 6. Prevent the next zoonotic pandemic through a strengthened One Health approach
 7. Trigger food systems transformation

UNICEF México, *Measures are Urgent to avoid Poor Nutrition in Mexico due to COVID-19* (Urgen medidas para evitar mala nutrición en México por COVID-19)⁴¹³ (22 July)

- INSP, FAO, PAHO and UNICEF ask for the implementation of urgent mitigation measures.
- Recommendations:
 1. Create emergency fund to protect nutrition of the most vulnerable groups.
 2. Extend social protection programs on breastfeeding, infant and young child nutrition in most-affected states (Asistencia Social Alimentaria).
 3. Secure consumption of animal-based products (i.e. eggs) and micronutrient supplementation.
 4. Maintain and strengthen the continuity of maternal and child health services during and after the pandemic.
 5. Strengthen programs and services to protect, promote and support infant feeding, and breastfeeding.
 6. Adhere to the WHO BMS Code.
 7. Use list of beneficiaries of programs available to serve vulnerable girls and boys and meet benefits of school feeding programs.
 8. Implement behavioral strategies to prevent the double burden of malnutrition in the context of COVID19. (including decrease consumption of ultra-processed foods and beverages).
 9. Promote the consumption of vegetables, fruits and legumes, as well as consumption of drinking water and facilitate its access especially for low-income population whose income was affected.
 10. Improve and facilitate access to water for hygiene and consumption practices.
 11. Promote the development of local and diverse agriculture.

H.H. Fore, Q. Dongyu, D.M. Beasley and Tedros A. Ghebreyesus, 'Child malnutrition and COVID-19: the time to act is now'⁴¹⁴ (27 July)

- Call to action from leaders of four UN agencies (FAO, WHO, WFP, and UNICEF) to avoid serve impacts of Covid-19 on child malnutrition, estimating that a minimum of US\$2.4 billion is needed and 'requires a swift response and investments from governments, donors, the private sector, and the UN'.



- Five urgent actions to protect children's right to nutrition in the COVID-19 pandemic:
 1. Safeguard and promote access to nutritious, safe, and affordable diets.
 2. Invest in improving maternal and child nutrition through pregnancy, infancy, and early childhood ('preventing the inappropriate marketing of infant formula in the context of COVID-19').
 3. Reactivate and scale up services for the early detection and treatment of child wasting.
 4. Maintain the provision of nutritious and safe school meals for vulnerable children.
 5. Expand social protection to safeguard access to nutritious diets and essential services.

WFP, *Good Nutrition for Vulnerable Urban Populations in the Context of COVID-19: WFP Interim Guidance*⁴¹⁵ (July)

- Sets out the characteristics that make urban populations particularly vulnerable (population density, informal settlements/livelihoods, high mobility) and those most at risk (including those living with NCDs, street children etc.).
- It lists 'pillars for analysis and actions' to be taken to support nutrition in the health system, social protection system and the food system, the latter including:
 - 'Act with key actors in the food processing and retail sectors, including small and medium enterprises (SMEs) to improve supply and access to nutritious foods on the market to address nutrition needs, barriers and to shape the market and overall system.'
 - 'Work with other actors and stakeholders, including national SUN Business Networks (SBN) and other comparable platforms to support: expanded portfolio of nutritious foods produced by local businesses, including local fortification of staple foods; product reformulation (micronutrient fortification; reducing sugar, saturated fat and/or salt); disseminating evidence-based nutrition information; influencing the retail food environment by placing restrictions on marketing of unhealthy foods, high in sugar, saturated fat and/or salt and sugar-sweetened beverages (SSB); and empowering consumers to make informed choices through social behaviour change communication (SBCC) and other retail strategies.'
 - 'Leverage cash-based interventions to support the demand for diversified diets and include secondary nutrition outcomes of cash-based transfers ... Include measures to support access to fresh and fortified nutritious foods on the market, such as the inclusion of SBCC to encourage the consumption of such foods...'

UNICEF, *Prevention, Early Detection and Treatment of Wasting in Children 0-59 Months through National Health Systems in the Context of COVID19*⁴¹⁶ (30 July)

- This document is a tool for implementing the recommendations reflected in existing WHO and UNICEF guidance on the delivery of services through national health systems for the prevention, early detection and treatment of child wasting in the context of Covid-19.

August 2020

FDA and OSHA (USA), *Employee Health and Food Safety Checklist for Human and Animal Food Operations During the COVID-19 Pandemic*⁴¹⁷ (11 August)

- Checklist for FDA-regulated human and animal food operations to use when assessing operations during the Covid-19 pandemic, especially when restarting operations after a shutdown or when reassessing operations because of changes due to the Covid-19 public health emergency.
- It includes an 'employee health and social distancing checklist' and a 'food safety checklist'.

September 2020

NCD Alliance/SPECTRUM, *Signalling Virtue, Promoting Harm: Unhealthy Commodity Industries and COVID-19* (10 September)⁴¹⁸

- This report is based on a crowdsourcing model, with members of the NCD Alliance asked to submit examples of what stakeholders consider to be irresponsible actions by food/beverage, alcohol and gambling companies worldwide. Almost 800 submissions were received from over 90 countries, including 328 on what are



described as 'ultra-processed' food and drink products and 41 on breastmilk substitutes. The most frequently cited countries were the United Kingdom and United States (119 each), and middle-income countries also featured, notably India (43), Mexico (34) and Brazil (29).

- The report states that it is 'important to critically evaluate broader implications beyond the immediate and direct impacts of ... corporate philanthropy or social responsibility initiatives', such as donations (pp. 9–10), with strongly articulated concerns that donations are being used 'to secure legitimacy and manage corporate reputations...and build relationships with policy makers' (p. 21). The NCD Alliance's concern is that companies are 'signalling virtue by visibly contributing to relief efforts while continuing to promote products and practices that harm health and fuel the NCD epidemic' (p. 34).
- However, it does acknowledge that 'We recognize ... that many of the activities reported here will have provided invaluable funding for much-needed interventions by governments, civil society and international organisations in the context of urgent needs to act amid rapidly escalating losses in revenue and capacity' (p. 9).



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All URLs correct as of 9 October 2020. All dates of publication are 2020 unless stated.

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