REPORT ON THE COMPARATIVE NUTRITIONAL PROFILE OF FOOD AND BEVERAGE PRODUCTS MARKETED BY THE 21 LARGEST GLOBAL COMPANIES IN 9 COUNTRIES

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ABBREVIATIONS

ATNF – Access to Nutrition Foundation

HSR – Health Star Rating

NPSC - Nutrient Profile Scoring Criteria

WHO – World Health Organization

WHO Euro – World Health Organization European Regional Office nutrient profile model

DISCLAIMER

The George Institute for Global Health (The George Institute) prepared this report with input from the Access To Nutrition Foundation (ATNF). Sections of this report involving analysis of sales-weighted data were prepared by ATNF under the terms of their licence to use Euromonitor International data. ATNF is to assume responsibility for this aspect of the analysis.

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Data for Mexico were provided by Centro de Investigación en Nutrición y Salud, Instituto Nacional de Salud Pública, Mexico (INSP).

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EXECUTIVE SUMMARY

The overall goal of this study was to provide stakeholders, including companies, government, nutrition experts and others with a fuller understanding of the nutritional quality of packaged food and non-alcoholic beverage products sold by the 21 largest global manufacturers across nine countries. Nutrient information for 23,013 packaged food and beverage products in selected categories, made by the 21 manufacturers, was included in this analysis. Nutrient information was obtained either from product packaging or directly from the manufacturer and supplemented with imputed data.

Two nutrient profiling methods were selected to evaluate each company's product portfolio. The Australian Health Star Rating (HSR) system was used to assess the healthiness of company product portfolios. The proportion of products that could be considered 'healthy' using the HSR was examined using a cut-off of 3.5 out of 5.0 stars and was examined by country, by company and by food category. Each company was then ranked by both the mean HSR of their product portfolio, and the proportion of products receiving 3.5 HSR or above. This part of the analysis was done both with and without sales-weighting using data from Euromonitor. This approach was taken because TGI had successfully piloted it for a similar study in India undertaken for ATNF in 2016[1]. The World Health Organization's European Regional Office (WHO Euro) nutrient profiling method was used to assess the proportion of products in each company's portfolio that met the nutritional criteria for marketing to children eligibility. This analysis was performed for all products, regardless of the marketing target audience, as a useful supplementary method to assess the healthiness of products.

The mean healthiness of companies' products was 2.4 stars out of 5.0, with substantial variation between companies observed. A low proportion (31%) of products met the HSR cut-off for "healthy" of 3.5 out of 5.0 stars. Only 14% of products overall were eligible to be marketed to children according to the WHO Euro criteria, and a number of companies had no products eligible for marketing to children at all. When sales-weighting was incorporated into the analysis, the rankings of the companies in relation to healthiness changed and this weighting generally increased the disparities observed between companies. Companies with portfolios dominated by dairy products generally ranked highest (e.g. Danone, FrieslandCampina, Arla), and those with portfolios dominated by confectionery items generally ranked lowest (e.g. Ferrero, Meiji, Mondelez).

There were significant strengths and some important weaknesses to the analyses. For example, many companies were not willing to provide a list of the products in their portfolio, making it difficult to determine the market coverage achieved by the included products. The wide variation in the percentage of the companies' total global portfolios included in the study also needs to be taken into consideration when interpreting our results. As we included only nine countries in this analysis, this meant that in some cases we did not include the country with the highest sales (e.g. Ajinomoto is a Japanese company however Japan was not included in our analysis). On balance, however, it is reasonable to conclude that the average healthiness of the products provided and sold by the largest global food companies is sub-optimal.

[1] Access To Nutrition Foundation India Product Profile: https://www.accesstonutrition.org/sites/in16.atnindex.org/files/resources/india_product_profile_chapter.pdf

INTRODUCTION

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

In 2017, The George Institute was commissioned by the Access to Nutrition Foundation (ATNF) to produce the first-ever multi-country *Product Profile* to be incorporated into the 2018 Global Access to Nutrition Index. The Index will score and rank the contribution of the world's 22 largest food and beverage manufacturers to tackling the global rise in diet-related diseases. It will combine an analysis of those companies' policies, practices and disclosures (the Corporate Profile) with an analysis of the nutritional quality of each company's food and beverage products in nine different country markets (the Product Profile).

The George Institute was selected to undertake this study given its existing global branded food composition database, which contains food composition data for over 450,000 branded products sold in the global food supply, and its successful completion of a similar study for ATNF in India in 2016. The work was conducted by a team at The George Institute for Global Health, with advice from Prof. Mike Rayner at Oxford University, who led an earlier similar project for ATNF and who is a member of ATNF's Expert Group. The methods for that pilot project can be found online.[2] The ATNF team, who had access to sales data from the Euromonitor database, also did a series of subsidiary sales-weighted analyses that have been included in this report.

This report sets out the objectives, methods, results and interpretation of the Product Profile analysis done in 2017 using data for nine countries.

[2] Access to Nutrition Index and Oxford University, Product Profile: Approach and Methods, 2013 https://www.accesstonutrition.org/sites/www.accesstonutrition.org/files/atni_product_profile_methodology_final.pdf

OVERALL GOAL AND SPECIFIC OBJECTIVES

The overall goal of this work was to provide stakeholders, including companies, government, nutrition experts and others with a fuller understanding of the nutritional quality of packaged food and non-alcoholic beverage products (hereafter "foods and beverages") sold by the world's largest manufacturers globally across a selection of nine countries.[3] Specific objectives were to answer the following questions:

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

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

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

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

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

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

[3] Note that nutritional quality for the purposes of this report does not include assessment of whether products have been fortified with micronutrients.

METHODS

Selection of countries

The nine countries included in this report were those countries for which extensive data for packaged food and beverage products were readily available at no cost and with no restriction to the use of product-level data. The George Institute holds a branded food database containing comprehensive nutrient information for eight countries, with country datasets updated regularly. Alongside this, Mexico's Institute for Public Health (INSP) has an annually-updated branded food database which they provided 2014/15 data from for this project. Hence, the nine countries included in this analysis are as follows:

1. Australia (AU)
2. China (CN)
3. Hong Kong (HK)
4. India (IN)
5. Mexico (MX)
6. New Zealand (NZ)
7. South Africa (ZA)
8. UK (UK)
9. USA (US)

The countries provide a good geographical spread with representation from Australasia, Europe, Africa, North America and Central America. However, these countries were not selected to be representative of global sales. Instead, they were selected based on availability of data and in order to get a broad view of differences in healthiness of global company portfolios in different countries and regions.

Selection of companies

ATNF requested The George Institute to include the products of 22 global food and beverage manufacturers. The included companies, in alphabetical order, with the name used throughout this report in brackets are:

- Ajinomoto Co Inc (Ajinomoto)
- Arla Foods Amba (Arla)
- Brasil Foods
- Campbell Soup Co (Campbell's)
- Coca-Cola Co (Coca-Cola)
- ConAgra Brands Inc (ConAgra)
- Danone Groupe (Danone)
- Ferrero Group (Ferrero)
- General Mills Inc (General Mills)
- Grupo Bimbo SAB de CV (Grupo Bimbo)
- Kellogg Co (Kellogg's)
- Kraft Heinz Co (Kraft Heinz)
- Lactalis Groupe (Lactalis)
- Mars Inc (Mars)
- Meiji Holdings Co Ltd (Meiji)
- Mondelez International Inc (Mondelez)
- Nestlé SA (Nestlé)
- PepsiCo Inc (PepsiCo)
- Royal FrieslandCampina NV (FrieslandCampina)
- Suntory Holdings Inc (Suntory)
- Tingyi International Group (Tingyi)
- Unilever

However, only three Brasil Foods products were available for assessment across the nine countries covered in this study, therefore Brasil Foods was dropped from the study.

It's important to note that not all companies operated in each of the nine countries examined in this report. Table A below outlines which companies were examined in each country.

***Table A** Country datasets used for each company's analysis*

Company	AU	CN	HK	IN	MX	NZ	ZA	UK	US	**Total**
Ajinomoto	X	√	√	X	X	X	√	√	X	**4**
Arla	√	X	√	X	X	X	X	√	√	**4**
Campbell's	√	X	√	√	√	√	X	√	√	**7**
Coca-Cola	√	√	√	√	√	√	√	√	√	**9**
ConAgra	X	X	X	√	√	√	√	X	√	**5**
Danone	√	√	√	X	√	X	√	√	√	**7**
Ferrero	√	√	√	√	√	√	√	√	√	**9**
General Mills	√	√	√	√	√	√	√	√	√	**9**
Bimbo	X	√	X	X	√	X	X	√	√	**4**
Kellogg's	√	X	√	√	√	√	√	√	√	**8**
Kraft Heinz	√	√	√	√	√	√	√	√	√	**9**
Lactalis	√	X	√	X	√	√	√	√	√	**7**
Mars	√	√	√	√	√	√	√	√	√	**9**
Meiji	√	√	√	X	X	X	X	X	X	**3**
Mondelez	√	√	X	√	√	√	√	√	√	**8**
Nestlé	√	√	√	√	√	√	√	√	√	**9**
PepsiCo	√	√	√	√	√	√	√	√	√	**9**
FrieslandCampina	X	X	√	X	X	X	X	√	X	**2**
Suntory	√	√	√	X	X	√	√	√	X	**6**
Tingyi	X	√	X	X	X	X	X	X	X	**1**
Unilever	√	√	√	√	√	√	√	√	√	**9**
TOTAL number of companies per country	**16**	**15**	**17**	**12**	**15**	**14**	**15**	**18**	**16**	

* Note Brasil Foods not shown as no data available

Choice of nutrient profile models

Nutrient profiling is the science of classifying or ranking foods according to their nutritional composition for the purpose of preventing disease and promoting health.[4] Nutrient profile models have been developed by academics, government departments, health-related charities and the food industry for a variety of applications including: to underpin food labelling; to regulate advertising of products to children; and to regulate health and nutrition claims. Although nutrient profiling is a tool to quantify aspects of individual foods, not diets, nutrient profile models are commonly used to underpin policies designed to improve the overall nutritional quality of diets.

There is no international consensus about the superiority of one particular nutrient profiling model, in part due to the different purposes and contexts in which each model has been developed. Therefore, this study started from the position that multiple models should be used to assess products if possible. A catalogue developed for the World Health Organization in 2011 of more than 50 nutrient profile models was reviewed and updated.[5] With the guidance of the ATNF Expert Group, this study sought to select systems that met the following criteria:

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

[5] World Health Organization (in press) Nutrient profiling: catalogue of nutrient profile models: Geneva: WHO

- Developed with appropriate stakeholder consultation
- Covered the majority of categories of processed food and beverage products
- Took into account both positive and negative nutrients
- Was not designed solely to address school foods, given requirement to assess foods in the general market
- Well-validated with results published in the peer-reviewed literature demonstrating that the models produce internally consistent classifications of 'healthy' and 'unhealthy' foods, consistent with general nutrition principles
- Enabled differentiation of nutritional quality within and between categories
- Algorithm in the public domain so as to be able to access and apply it
- Able to generate meaningful results across all countries

Of the 67 models included in the updated catalogue, two were selected as the best fit for these criteria:

1) **The Australian Health Star Rating (HSR)** is a front-of-pack interpretive nutrition labelling system designed to assist consumers in making healthier choices. The underlying nutrient profile model assesses risk nutrients (overall energy, sodium, total sugar, saturated fat) and positive nutrients (fruit and vegetable content, protein, fibre and in some cases, calcium) to score products on the basis of nutritional composition per 100g or 100mL across one of six categories. These scores are then converted to a 'Health Star Rating' from ½ to 5 stars. Development was led by the Australian government in collaboration with industry, public health and consumer groups, and builds upon the Nutrient Profiling Scoring Criteria (NPSC) previously developed by the Australian and New Zealand Governments to regulate health claims.[6] The NPSC itself was developed from United Kingdom's Ofcom model. The HSR has been implemented in Australia since June 2014 on a voluntary basis. The system has also been adopted in New Zealand. Further detailed information is available online.[7] The prior pilot study by Rayner et al. utilised the Australian NPSC but since the HSR has refined and built upon the NPSC, the HSR was selected for this analysis.

2) **The WHO Euro model** is a nutrient profile model for use and adaptation by Member States of the WHO European Region when developing policies to restrict food marketing to children. The model operates by first requiring foods to be allocated to one of 20 categories. Products are then checked against category-specific compositional thresholds for nutrients and other food components. A product must not exceed on a per 100g/mL basis any of the relevant thresholds for that product category if marketing is to be permitted. Results under this model are simply expressed on a binary basis i.e. 'marketing permitted' or 'marketing not permitted'. Although originally developed in Europe, the model is being adapted for other WHO Regions. In the absence of standardised regulation in this area, the model was selected as a reasonable basis by which to determine products' suitability to be marketed to children in all countries included in analysis.

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

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

Table B *Comparison of the HSR and WHO Euro models*

	HSR	WHO Euro
Country/region of origin	Australia	Europe
Date of development	2014	2015
Scoring method	Negative nutrients score is combined with positive nutrients score to arrive at a final 'score' which is then converted to a Health Star Rating from 0.5 to 5.0.	Products must not exceed category-specific thresholds per 100g/mL to be permitted to market to children.
Positive nutrients	Protein Fibre Fruit, vegetable, nut and legume content (FVNL) Calcium	N/A
Negative nutrients	Energy Saturated fat Total sugars Sodium	Total fat Saturated fat Total sugars Added sugars Artificial sweeteners Trans fat Sodium
Original purpose of development and existing applications	Front-of-pack nutrition labelling.	Regulation of marketing to children.
Original scoring system	Depending on which category the product falls in, the 'score' is converted to a Health Star Rating from 0.5 to 5.0 stars that can be displayed in a logo on the front of pack.	Depending on the product category, marketing to children is either never permitted (e.g. for confectionery), or only permitted if the product does not exceed specified thresholds of negative nutrients per 100g/mL.

Calculating a nutrient profile score for a product requires values for all data points used by the nutrient profile model and imputation of missing data was therefore required for some countries.

As noted, these two models were also used in the 2016 India Product Profile study and proved suitable for such studies.

Eligibility of food and beverage products

Foods and beverages eligible for inclusion were defined as *'all packaged foods and non-alcoholic beverages manufactured by the included companies.'* A food or beverage was considered a unique item based upon the brand name and description irrespective of serving size and packaging (i.e. a specific brand of cola sold in 330mL cans was considered to be the same food item as the same specific brand of cola sold in 600mL bottles).

The following products were excluded from analyses:

1. Unprocessed meat, poultry, fish and raw agricultural commodities such as plain cereals (on the basis that such foods are not generally required to carry a nutrient declaration)
2. Plain tea and coffee (on the basis that these make an inherently low nutritional contribution and are thereby not required to display a nutrient declaration)
3. Some condiments such as herbs, salt, pepper, vinegars and spices (on the basis that these make an inherently low nutritional contribution and are thereby not required to display a nutrient declaration)

4. Infant formulas, medical nutrition supplements and baby food and baby beverages (excluded because these products are not consumed by the general population and the selected models are not appropriate for their evaluation).

Data collection

Nutrient information was extracted from photographs of product packaging and entered into The George Institute's Food*Switch* database, or in the case of Mexico, into INSP's data entry system. Products in The George Institute's Food*Switch* database with data entered or updated from 2013 onwards were used to generate product lists for each company. For each company, the top five Euromonitor categories (according to sales data) were identified by ATNF, and that list was provided to The George Institute. In September 2017, the 21 companies were provided with their product lists from the top five Euromonitor subsets in each market for review (product list and nutrient content were provided) and offered an opportunity to make corrections or additions to information about their product range. Eleven of the included companies (Danone, Ferrero, General Mills, Bimbo, Kellogg's, Meiji, Mondelez, Nestle, PepsiCo, FrieslandCampina and Unilever) accepted the offer to supply their full product list, with an additional two companies (Campbell's and Coca-Cola) providing product lists for selected countries. For products that required additional ingredients to be added before consumption (e.g. a beverage powder or dry cake mix), companies were asked to provide information for the product "as consumed" for this project. However, if these values were not available, the "as sold" nutrient values were used in analysis.

Imputation of essential missing data

For many products the available nutritional information was insufficient to apply the selected nutrient profile models. This is due to differences in legislation around what nutrients are required to be displayed on the label (for example, fibre is mandatory in the USA but not in all countries included in our analysis). It was therefore necessary to impute missing data which was done as follows:

- For countries that do not require certain nutrients to be displayed on pack, proxy values for those nutrients (most commonly saturated fat, total sugar, sodium, fibre and 'fruit vegetable nut and legume' (FVNL) content) were used. These proxy values were developed by The George Institute using the average value of the products with available data. These proxy values were estimated for each category and assigned to those products in that category with missing data.
- For added sugars a standard proportion of total sugars was assumed and was specified at the category level.

It is worth noting that some companies provided the required missing information such as added sugar content and FVNL content, so imputation was not necessary in all cases.

Product categorisation

Products were categorised in three ways:

- To one of The George Institute's country-specific categories
- To one of 21 WHO Euro categories
- To one of 23 categories within the Euromonitor International food and beverage categorisation system. Euromonitor is a privately-owned market research firm providing data and analysis on total market sizes, market shares and trends in a range of industries, including food. This categorisation was made to enable the nutrition analysis to be combined with sales data.

Groupings of Euromonitor categories - hereafter called 'Euromonitor subsets' - were made to generate subsets of products of sufficient size to allow nutritional analysis of comparable food products.

***Table C** Euromonitor subsets*

Foods	Beverages
Baked Goods	Bottled Water
Breakfast Cereals	Carbonates
Confectionery	Concentrates
Dairy	Juice
Ice Cream and Frozen Desserts	Other Hot Drinks
Processed Fruit and Vegetables	RTD Coffee
Ready Meals	RTD Tea
Rice, Pasta and Noodles	Sports and Energy Drinks
Sauces, Dressings and Condiments	
Savoury Snacks	
Soup	
Spreads	

Definitions of these category and sub-category subsets are provided on ATNF's website.

Application of imputed data in the nutrient profile models

The two nutrient profile models were applied with the following use of proxy information from imputed values:

- For the purposes of generating a Health Star Rating, proxy values were used for saturated fat, sugar, fibre and sodium, but *only* if information was not missing for three or more of four key nutrients (saturated fat, sugar, sodium, protein). If three or more of these nutrients were missing, then the product was excluded from the analysis. Products were not included in the analysis if energy content was missing. Plain packaged water was assigned a Health Star Rating of 5.0 consistent with the HSR Guidelines.[8]
- For the purposes of generating an outcome under the WHO Euro model, proxy values were used for total fat, saturated fat, sugar and sodium, but *only* if the product was not missing three or more nutrients required for analysis under a similar strategy to that described above for the HSR. Eligibility was determined category-by-category as per the WHO model which uses different nutrient criteria for each WHO-specified category.

These decisions were a pragmatic compromise between enabling analysis of the majority of identified products versus basing analysis on mostly proxy data. Due to differences in the models and nutrients involved, some products were eligible for scoring under one model but not another. The two tables on the following page show the number of products from each country with proxy data used in analysis.

Sales data

Sales data were obtained at the Euromonitor subset level for each company. This was used to generate sales-weighted outcomes for the three sets of analyses. As ATNF held the licence for the Euromonitor data, ATNF did the analyses and provided The George Institute with results. ATNF accepts full responsibility for these components of the report. The sales data were those for the 2016 period. Where a company did not command 0.1% or more market share in a category in a country, no sales data were available.

[8] Australian Government, Health Star Rating System 'Guide for Industry', available at http://healthstarrating.gov.au/internet/healthstarrating/publishing.nsf/Content/guide-for-industry-document (accessed 11 November 2016)

Sales-weighted HSRs were calculated per company in two steps. As the comparison between companies was the main objective of this assessment, sales weighting was performed from a company perspective and not from a country perspective. Company's sales-weighted mean HSRs in each country were calculated as the first step, based on the category sales relative to the total combined sales for all the company's categories assessed in that country. As a second step, sales-weighted HSRs were calculated per company, based on the country sales relative to the total combined sales of all relevant countries for the company. This approach was taken to apply a weighting that is most relevant for health impact (assuming sales are correlated with consumption) as well as company commercial value.

To calculate the total value of sales at the country-level generated by healthy products, a similar two-step approach was taken. For the first step, total sales of the company within each category in each country was multiplied by the percentage of healthy products (i.e. products with an HSR of 3.5 of more) in the category, a figure generated by TGI. The second step was similar to the second step of the sales-weighted HSRs, to calculate the company's overall weighted value. The same approach was taken to calculate the total values of sales generated by products suitable to be marketed to children under the WHO Euro criteria.

Ideally, sales values of individual products would have been used to generate a more accurate sales-weighted data; however, such product-level data were not available for this analysis. Using category sales data was the most accurate available option.

Table D *Number of products from each country where proxy values were used in analysis for the Health Star Rating*

	AU	CN	HK	IN	MX	NZ	ZA	UK	US
Total products analysed (n)	2931	1022	736	498	1284	2412	980	3510	9640
All data direct from label (n)	126	0	3	0	135	49	21	271	0
Proxy data required for one component (n)	1063	201	398	259	1110	960	861	2424	7817
Proxy data required for two components (n)	1627	54	300	42	2	1315	12	386	1240
Proxy data required for three components (n)	0	213	5	50	0	0	0	0	0
Proxy data required for more than three components (n)	0	453	0	122	0	0	0	0	0
Unable to be analysed due to insufficient data (n)	115	101	30	25	37	88	86	429	583

China and India required proxy data for a larger proportion of products due to differences in labelling requirements in these countries. In China, sugar and saturated fat are not mandatory to display on nutrition labels, and in India saturated fat and sodium are not mandatory. See Table 1 in Appendix A for a breakdown of each country's nutrients that are mandated to appear on nutrition labels.

Table E *Number of products from each country where proxy values were used in analysis for the WHO Euro criteria*

	AU	CN	HK	IN	MX	NZ	ZA	UK	US
Total products analysed (n)	2936	1022	736	498	1284	2412	980	3510	9640
All data direct from label (n)	1729	627	458	305	793	1385	653	2771	6871
Proxy values used* (n)	1117	351	250	171	489	971	295	452	2455
Unable to be analysed due to insufficient data (n)	90	44	28	22	2	56	32	287	314

* Requirements differ depending on which WHO category is being observed.

Analysis strategy

Six research questions were addressed:

1. *What is the average nutritional quality of each company's product portfolio and how do companies compare?* This question was addressed by calculating the mean HSR of the product portfolio for each company and ranking companies accordingly. Separate analyses (included as Appendices in this report) were also done by Euromonitor subset and by country.

2. *What is the average sales-weighted nutritional quality of each company's product portfolio and how do companies compare?* The metric used was the sales-weighted mean HSR of the product portfolio. ATNF calculated this for each company by: (1) calculating the mean HSR for each Euromonitor subset; (2) multiplying the mean HSR of the food category by the percentage sales for the subset; (3) summing the values obtained for all subsets.

3. *What proportion of each company's products are 'healthy' and how do companies compare?* The metric used was the proportion of the product portfolio that had a HSR of 3.5 stars or above. Separate analyses (included as Appendices) were also done by Euromonitor subset and by country. The cut point of 3.5 or above (≥3.5 HSR) is based on work commissioned by the New South Wales Ministry of Health in Australia examining the alignment of HSR with existing school food service provision standards and the Australian 2013 Dietary Guidelines. That work found that "healthy core foods with a HSR of ≥3.5 can be confidently promoted in public settings as healthier choices."[9]

4. *What proportion of each company's product sales are 'healthy' and how do companies compare?* The metric used was the proportion of a company's sales that were products with a HSR of 3.5 or above. ATNF estimated this for each company by: (1) calculating the percentage of products in each Euromonitor subset with an HSR of 3.5 or above; (2) multiplying that percentage by the percentage sales for the subset; (3) summing these values for all subsets.

5. *What proportion of each company's products is eligible to be marketed to children and how do companies compare?* The metric used was the proportion of the product portfolio meeting WHO Euro criteria for marketing to children. Separate analyses (included as Appendices) were also done by Euromonitor subset and by country.

6. *What proportion of each company's product sales is eligible to be marketed to children and how do companies compare?* The metric used was the proportion of a company's sales that were products eligible to be marketed to children under the WHO Euro model. ATNF estimated this for each company by: (1) calculating the percentage of eligible products in each Euromonitor subset; (2) multiplying that percentage by the percentage sales for the subset; (3) summing these values for all subsets.

The data were analysed using STATA statistical software version 14.1.

[9] Dunford E, Cobcroft M, Thomas M, Wu JH. Technical Report: Alignment of the NSW Healthy Food Provision Policy with the Health Star Rating System. Sydney, NSW: NSW Ministry of Health; 2015. Available at http://www.health.nsw.gov.au/heal/Publications/health-star-rating-system.pdf

OVERALL RESULTS

Out of the 23,013 products included in analysis, there was sufficient nutrient information for 20,685 products to generate a Health Star Rating and 22,137 had sufficient nutrient data to be assessed under the WHO Euro model. Table D shows the number of products in each country by company.

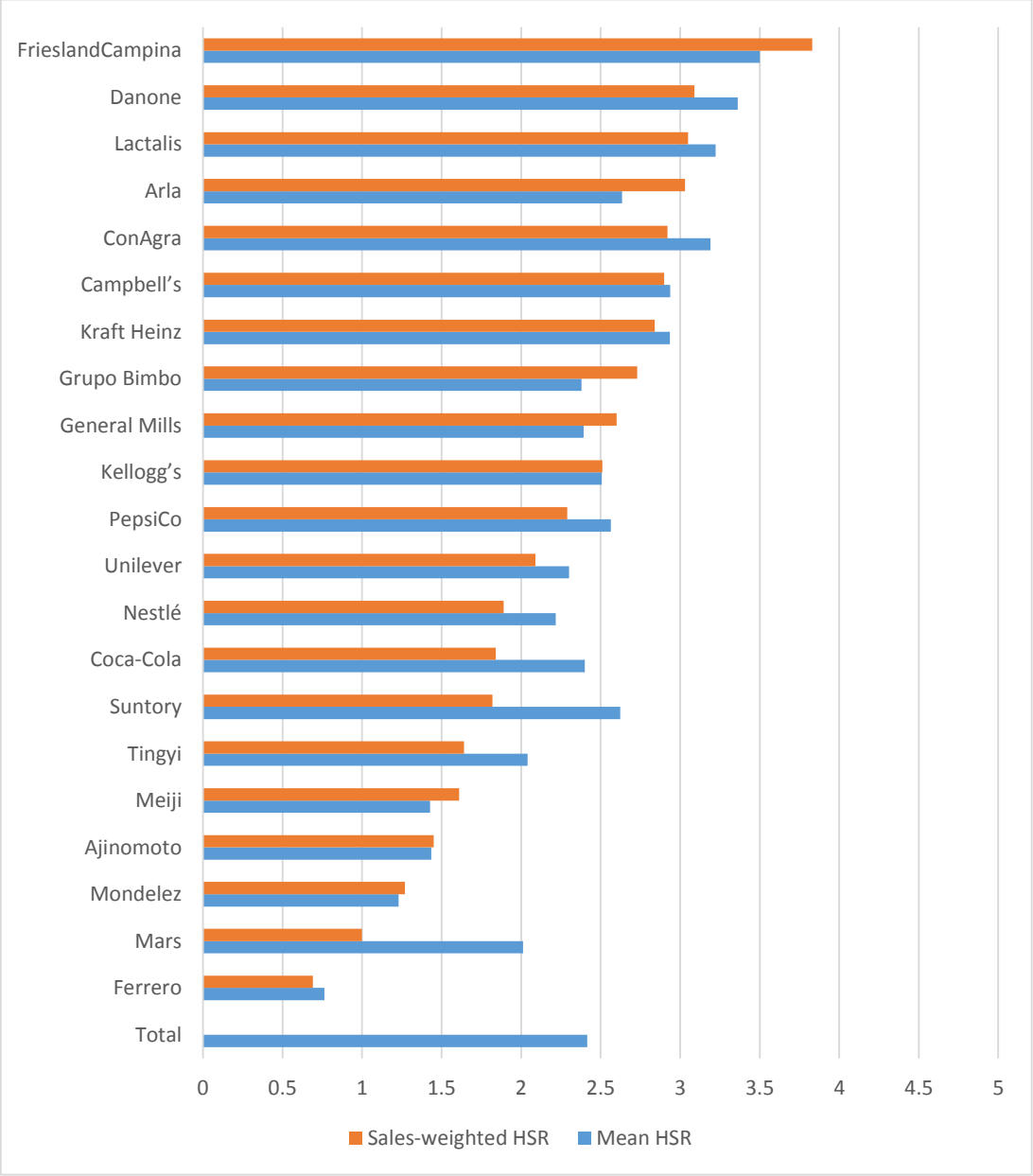
Table F *Number of products included in analysis by company and country*

Company	AU	CN	HK	IN	MX	NZ	ZA	UK	US	Total
Ajinomoto	-	2	61	-	-	-	8	30	-	**101**
Arla	12	-	9	-	-	-	-	80	31	**132**
Campbell's	238	-	29	3	40	202	-	29	992	**1,533**
Coca-Cola	167	71	59	33	139	160	86	160	370	**1,245**
ConAgra	-	-	-	31	43	6	8	-	1,166	**1,254**
Danone	47	27	3	-	113	-	65	113	421	**789**
Ferrero	18	8	22	16	9	4	12	183	42	**314**
General Mills	93	73	59	22	88	52	12	207	1,044	**1,650**
Bimbo	-	20	-	-	225	-	-	16	216	**477**
Kellogg's	108	-	41	39	83	108	23	243	691	**1,336**
Kraft Heinz	331	21	41	4	40	626	37	305	1,218	**2,623**
Lactalis	297	-	50	-	11	2	129	119	37	**645**
Mars	406	146	82	18	22	192	151	433	650	**2,100**
Meiji	4	33	42	-	-	-	-	-	-	**79**
Mondelez	401	186	-	79	103	255	97	728	552	**2,401**
Nestlé	222	31	85	33	98	172	71	262	1,093	**2,067**
PepsiCo	233	139	83	113	214	167	70	241	622	**1,882**
FrieslandCampina	-	-	16	-	-	-	-	8	-	**24**
Suntory	145	7	22	-	-	256	12	81	-	**523**
Tingyi	-	158	-	-	-	-	-	-	-	**158**
Unilever	209	100	32	107	56	210	199	272	495	**1,680**
TOTAL	**2,931**	**1,022**	**736**	**498**	**1,284**	**2,412**	**980**	**3,510**	**9,640**	**23,013**

The US had the largest number of products included in analysis overall (9,640), followed by the UK (3,510) and Australia (2,931). India had the lowest with 498 products, followed by Hong Kong (736) and South Africa (980). The company with the largest number of products across the nine countries included was Kraft Heinz (2,623) followed by Mondelez (2,401) and Nestlé (2,067), with FrieslandCampina the lowest number (24).

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

Figure A: *Mean Health Star Rating by company – overall product portfolio*



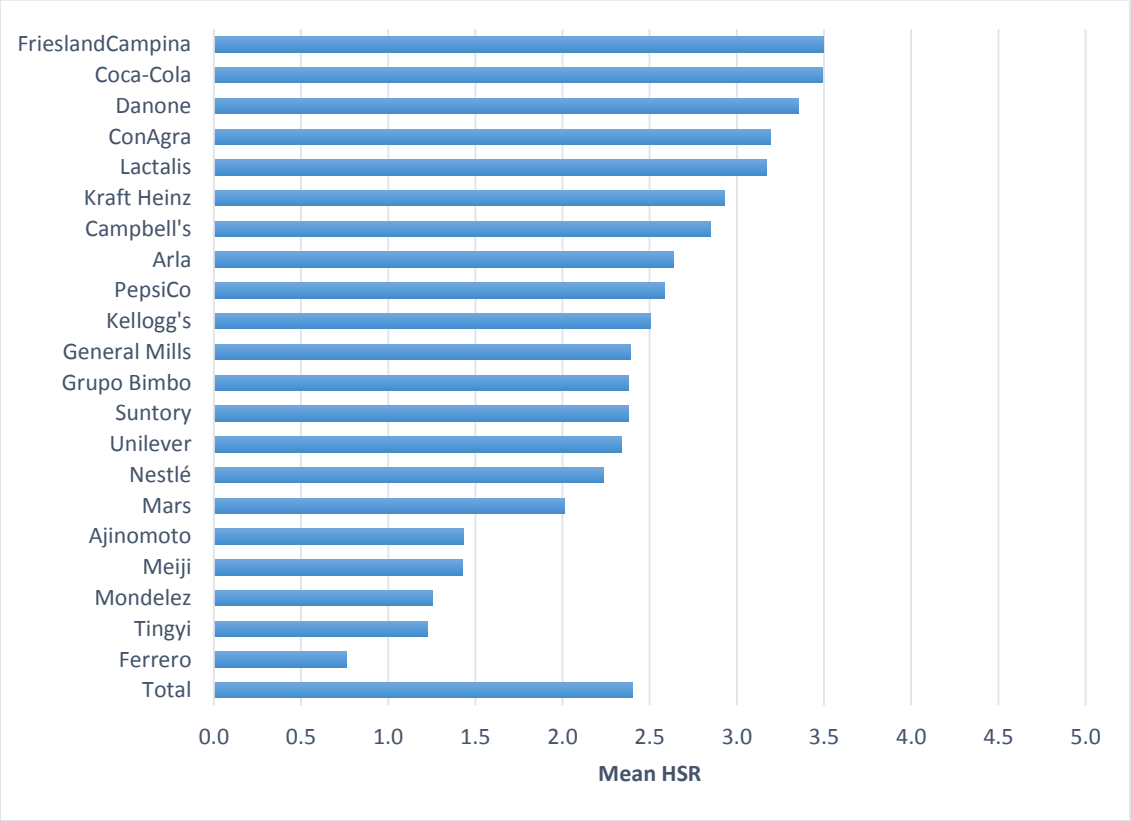
FrieslandCampina had the highest mean overall HSR of 3.5 out of 5.0, slightly ahead of Danone with 3.4. Ferrero had the lowest mean HSR of 0.8 out of 5.0 followed by Mondelez with a mean HSR of 1.2. When results were weighted by product sales, the overall company rankings changed slightly, with seven companies increasing their mean HSR (Meiji, Mondelez, Ajinomoto, Grupo Bimbo, General Mills, Arla and FrieslandCampina). All other companies except one (Kellogg's) had a decrease in mean HSR when product sales were taken into account. Overall, mean HSR was low at only 2.4 stars out of 5.0 for all companies combined. FrieslandCampina had the highest average HSR both before and after sales-weighting of results, although this result should be interpreted with caution as only 2% of FrieslandCampina's global sales were included in analysis.

Table G *Proportion of sales that each country represented for each company*

Company	% global sales represented	% sales represented across the 9 countries
Ajinomoto	5%	**100%**
Arla	10%	**100%**
Campbell's	93%	**90%**
Coca-Cola	49%	**100%**
ConAgra	94%	**100%**
Danone	28%	**100%**
Ferrero	24%	**100%**
General Mills	84%	**77%**
Bimbo	72%	**100%**
Kellogg's	72%	**99%**
Kraft Heinz	87%	**85%**
Lactalis	16%	**100%**
Mars	61%	**99%**
Meiji	5%	**100%**
Mondelez	43%	**97%**
Nestlé	54%	**82%**
PepsiCo	65%	**94%**
FrieslandCampina	2%	**100%**
Suntory	15%	**96%**
Tingyi	97%	**98%**
Unilever	42%	**85%**

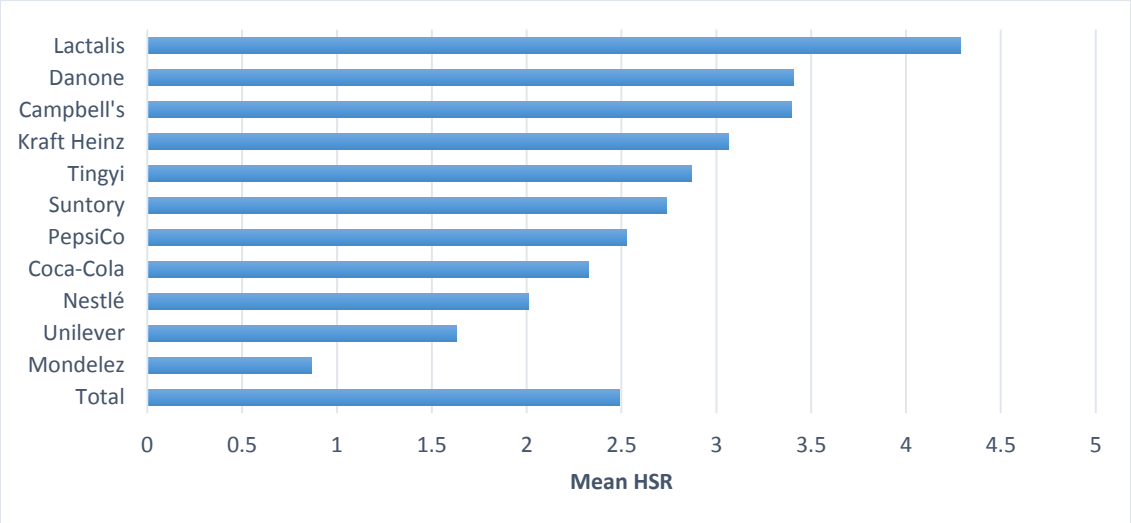
Table G shows both the proportion of global sales that the included companies and countries represented in this analysis, as well as the proportion of sales within the nine countries that were captured with our product data. The range of global sales that the nine countries represented in this analysis ranged from less than 10% of the portfolios of Friesland Campina, Ajinomoto and Meiji being included, as the majority of their sales are in countries not included in this analysis to more than 85% of ConAgra's, Campbell's and Tingyi's portfolios. This is an important consideration when interpreting results, as in a number of cases we have not included countries in the analysis which represent a company's largest sales market. For example, Ajinomoto's largest market is Japan, resulting in only 3% of global sales being represented in this current report, versus 98% for Tingyi, which predominantly operates in China. However, this report is not meant to provide a global comparison, but instead provide a comparison within the nine countries included in this report. By including the top five categories by sales for each company within each of the nine countries, we captured more than 75% of products sold by each company.

Figure B: *Mean Health Star Rating by Company – foods only*



When examining foods separately from beverages, Coca-Cola moved from the bottom half of the rankings for companies to ranking second overall. FrieslandCampina remained in the number one ranking, with Danone, ConAgra and Lactalis retaining high rankings as well. Once again, these rankings are due to the high proportion of dairy products sold by these companies. Coca-Cola however had products in both the 'Dairy' and 'Processed Fruit and Vegetable' categories, leading to its high ranking when examining its results without beverages included.

Figure C: *Mean Health Star Rating by Company – beverages only*



When examining beverage products separately, Lactalis and Danone had the highest mean HSR of all companies, due to their range comprising 100% fruit juices, bottled waters or dairy-based beverages. Mondelez had the lowest mean HSR for beverages, due to its beverages range consisting of hot chocolate and beverage mixes (e.g. Tang).

Table H: *Number of products with each Health Star Rating overall and by company*

Health Star Rating: 3.5 stars or more = healthy product											
	0.5	**1.0**	**1.5**	**2.0**	**2.5**	**3.0**	**3.5**	**4.0**	**4.5**	**5.0**	**All**
Ajinomoto	51	6	3	6	7	6	7	6	0	0	**92**
Arla	16	19	10	7	11	6	5	4	1	29	**108**
Campbell's	76	63	104	156	144	227	407	143	45	97	**1,462**
Coca-Cola	26	310	183	303	4	19	59	15	68	202	**1,189**
ConAgra	67	20	44	47	62	135	379	159	90	33	**1,036**
Danone	21	20	11	103	93	110	139	36	49	177	**759**
Ferrero	156	95	17	3	0	1	0	0	0	0	**272**
General Mills	55	188	244	267	217	218	185	81	50	36	**1,541**
Bimbo	44	67	93	31	18	74	74	54	15	7	**477**
Kellogg's	41	90	227	266	234	125	76	144	74	33	**1,310**
Kraft Heinz	169	86	192	248	172	165	423	314	115	192	**2,076**
Lactalis	44	32	13	25	43	105	89	67	68	76	**562**
Mars	455	185	138	64	83	155	275	164	2	4	**1,525**
Meiji	28	7	8	20	8	3	0	0	0	1	**75**
Mondelez	869	446	314	136	94	74	45	39	6	18	**2,041**
Nestlé	397	185	224	247	138	297	325	147	43	26	**2,029**
PepsiCo	102	237	267	279	189	175	140	154	102	168	**1,813**
FrieslandCampina	0	2	0	2	0	2	5	9	3	1	**24**
Suntory	50	69	54	86	37	61	13	11	10	113	**504**
Tingyi	35	8	30	11	10	0	27	12	1	3	**137**
Unilever	104	158	273	258	226	357	185	65	17	10	**1,653**
Total no. of products	**2,806**	**2,293**	**2,449**	**2,565**	**1,790**	**2,315**	**2,858**	**1,624**	**759**	**1,226**	**20,685**
% of total products	**14%**	**11%**	**12%**	**12%**	**9%**	**11%**	**14%**	**8%**	**4%**	**6%**	**100%**

Table H above shows the spread of results achieved by all companies in the nine included countries across the HSR spectrum. The 21 companies assessed offered products with a range of HSRs but a large number scored poorly. Just under half (49%) of all products on the market scored 2.0 stars or below. The products that scored 3.5 and above totalled 6,467, accounting for only 31% of all products.

Figure D: *Mean and range of Health Star Rating for selected Euromonitor subsets*

	n	Mean HSR	(range)
Baked Goods			
Grupo Bimbo	280	2.9	(0.5 to 5.0)
Kellogg's	100	2.2	(0.5 to 4.0)
Campbell's	150	3.2	(1.0 to 5.0)
Breakfast Cereals			
General Mills	138	2.7	(1.5 to 5.0)
Kellogg's	457	3.3	(1.0 to 5.0)
PepsiCo	119	3.9	(1.0 to 5.0)
Confectionery			
Mars	1270	1.2	(0.5 to 5.0)
Mondelez	1367	1.0	(0.5 to 3.5)
Nestlé	462	1.0	(0.5 to 4.0)
Dairy			
Kraft Heinz	471	2.4	(0.5 to 5.0)
Danone	668	3.4	(0.5 to 5.0)
Nestlé	281	1.9	(0.5 to 5.0)
Sauces, Dressings and Condiments			
Kraft Heinz	824	2.3	(0.5 to 4.5)
Unilever	343	2.4	(0.5 to 5.0)
Campbell's	292	3.1	(0.5 to 4.0)
Savoury Snacks			
PepsiCo	927	2.4	(0.5 to 5.0)
Kellogg's	309	2.0	(1.0 to 4.5)
Mondelez	187	2.4	(0.5 to 4.5)

To illustrate the variation between different companies in nutritional quality by Euromonitor subset, we selected subsets that had at least three companies and a wide range of HSRs and have shown them in Figure D above. The mean HSR is illustrated by the short vertical line and the range of HSRs by the horizontal lines.

Figure E: *Mean Health Star Rating by Country – overall product portfolio*

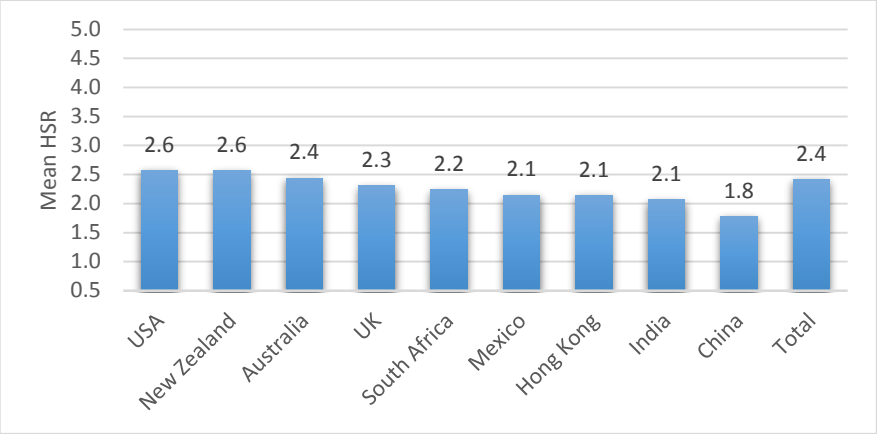


Figure F: *Mean Health Star Rating by Country – foods only*

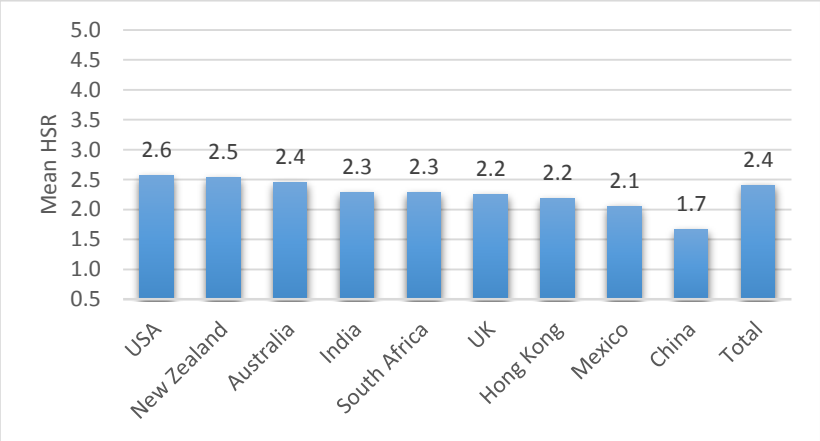


Figure G: *Mean Health Star Rating by Country – beverages only*

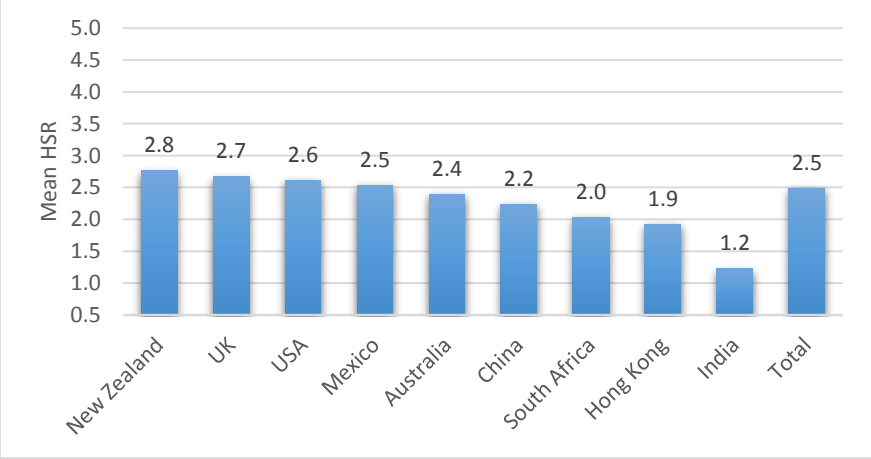


Figure E shows that the USA and New Zealand had the highest mean HSR of the nine countries included in the analysis (2.6). The trend appeared to be that western countries such as the USA, New Zealand, Australia and the UK had higher overall HSRs compared to developing countries such as India and China which were ranked last using this metric. When results were examined by foods (Figure F) and beverages (Figure G) separately, the USA and New Zealand still had the highest mean HSRs overall, however the UK had a much higher mean HSR for beverages (2.7) compared to foods (2.2), and India had the opposite result with a higher mean HSR for foods (2.3) compared to beverages (1.2).

Table I: *Mean Health Star Rating by Euromonitor subset for each country (not sales-weighted)*

	AU	CN	HK	IN	MX	NZ	ZA	UK	US
Baked Goods	2.0	2.1	-	2.0	2.5	1.9	2.2	1.6	2.4
Bottled Water	2.7	3.5	3.2	5.0	2.3	3.0	2.8	3.1	2.9
Breakfast Cereals	4.0	4.0	3.3	3.3	2.8	3.7	3.4	3.4	3.0
Carbonates	1.6	1.1	1.8	1.9	1.5	1.4	1.3	1.8	1.9
Concentrates	2.2	0.5	0.5	0.7	1.2	1.5	-	1.9	-
Confectionery	1.1	1.2	1.7	0.9	1.2	1.3	1.2	0.8	0.8
Dairy	3.1	2.2	2.8	3.5	2.6	2.8	2.7	3.1	3.0
Edible Oils	-	-	-	3.5	4.6	-	-	-	-
Ice Cream and Frozen Desserts	1.9	2.3	2.0	2.3	2.1	1.9	2.3	1.8	2.2
Juice	3.5	3.6	2.6	0.8	4.7	4.1	4.5	4.0	3.2
Other Hot Drinks	1.9	-	-	0.9	-	1.5	1.2	1.3	-
Processed Fruit and Vegetables	4.0	-	4.0	4.0	-	4.2	-	4.3	4.1
Processed Meat and Seafood	-	-	3.0	-	1.9	-	2.4	-	3.2
RTD Coffee	4.2	1.0	1.1	-	-	4.0	-	-	-
RTD Tea	1.9	1.6	1.4	-	1.7	-	1.4	-	1.7
Ready Meals	3.5	-	2.0	3.5	1.7	3.4	2.8	3.2	3.0
Rice, Pasta and Noodles	3.6	0.8	-	2.4	-	3.2	1.5	3.6	3.0
Sauces, Dressings and Condiments	2.7	1.0	1.4	2.5	2.3	2.6	2.5	2.7	2.6
Savoury Snacks	2.8	2.8	2.8	2.5	2.0	2.1	1.7	2.2	2.5
Soup	3.3	0.5	3.3	3.7	3.1	3.4	2.9	3.5	3.2
Sports and Energy Drinks	1.4	1.7	1.2	-	1.5	1.3	1.3	1.5	1.6
Spreads	2.6	-	2.5	2.3	1.2	2.3	0.5	1.3	0.5
Sweet Biscuits, Snack Bars and Fruit Snacks	1.5	0.7	1.6	0.9	1.5	2.0	2.0	1.8	1.9

Table I shows the mean HSR when examining results by Euromonitor subset within each country.

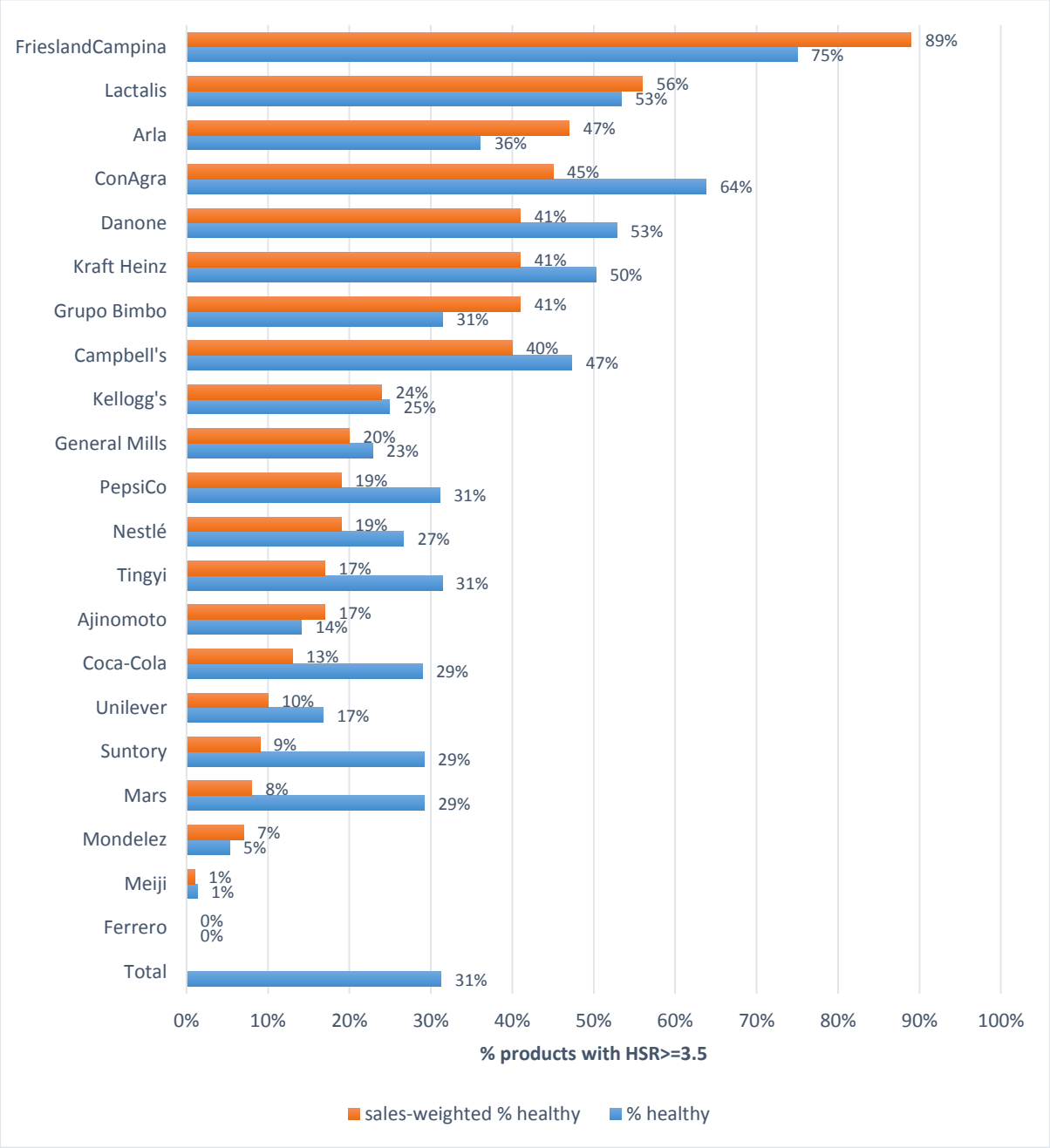
Table J: *Mean and range HSR of food products by Euromonitor subsets*

Euromonitor Subset	No. products	Mean (range) HSR
Processed Fruit and Vegetables	630	4.1 (1.5-5.0)
Edible Oils	13	3.9 (2.5-5.0)
Juice	1226	3.5 (0.5-5.0)
Breakfast Cereals	833	3.3 (1.0-5.0)
Soup	955	3.2 (0.5-4.5)
Processed Meat and Seafood	359	3.0 (0.5-5.0)
RTD Coffee	24	3.0 (0.5-4.5)
Ready Meals	1554	3.0 (0.5-5.0)
Bottled Water	348	2.9 (1.0-5.0)
Dairy	2838	2.9 (0.5-5.0)
Rice, Pasta and Noodles	374	2.9 (0.5-4.5)
Sauces, Dressings and Condiments	2355	2.5 (0.5-5.0)
Savoury Snacks	2174	2.4 (0.5-5.0)
Baked Goods	1084	2.2 (0.5-5.0)
Spreads	133	2.2 (0.5-5.0)
Ice Cream and Frozen Desserts	1380	2.1 (0.5-4.5)
RTD Tea	174	1.7 (1.0-2.0)
Sweet Biscuits, Snack Bars and Fruit Snacks	1766	1.7 (0.5-5.0)
Carbonates	656	1.6 (0.5-5.0)
Sports and Energy Drinks	356	1.5 (0.5-3.5)
Other Hot Drinks	186	1.4 (0.5-5.0)
Concentrates	144	1.3 (0.5-5.0)
Confectionery	3451	1.0 (0.5-5.0)

Table J shows the mean and range of HSRs in each Euromonitor subset overall for the 21 companies.

ANALYSIS 3 and 4: *Corporate and country rankings based upon proportion of 'healthy' products with HSR >=3.5*

Figure H: *Proportion of products with >=3.5 HSR by company*



FrieslandCampina had the highest proportion of products achieving an HSR of 3.5 or more (Figure H), followed by Lactalis, Arla, ConAgra and Danone. Likely reasons for these results are the fact that the top ranked companies had portfolios dominated by dairy products which fare well under the HSR algorithm. When results were examined separately by foods and beverages (Figures I and J respectively on the next page), Coca-Cola moved up the rankings to have the second highest mean HSR for foods, mainly due to its range of dairy products and processed fruit and vegetable products receiving high HSRs. Companies such as Ferrero, Meiji and Mondelez had the lowest proportion of products with an HSR>=3.5 due to their products ranges being dominated by confectionery items. Lactalis by far had the highest proportion of products receiving an HSR>=3.5, mainly due to its product range consisting of predominantly dairy

beverages which score highly under the HSR algorithm. Conversely, Unilever had no beverage products receiving an HSR>=3.5 due to its product range mainly consisting of RTD Teas.

Figure I: *Proportion of 'healthy' products by company – foods only*

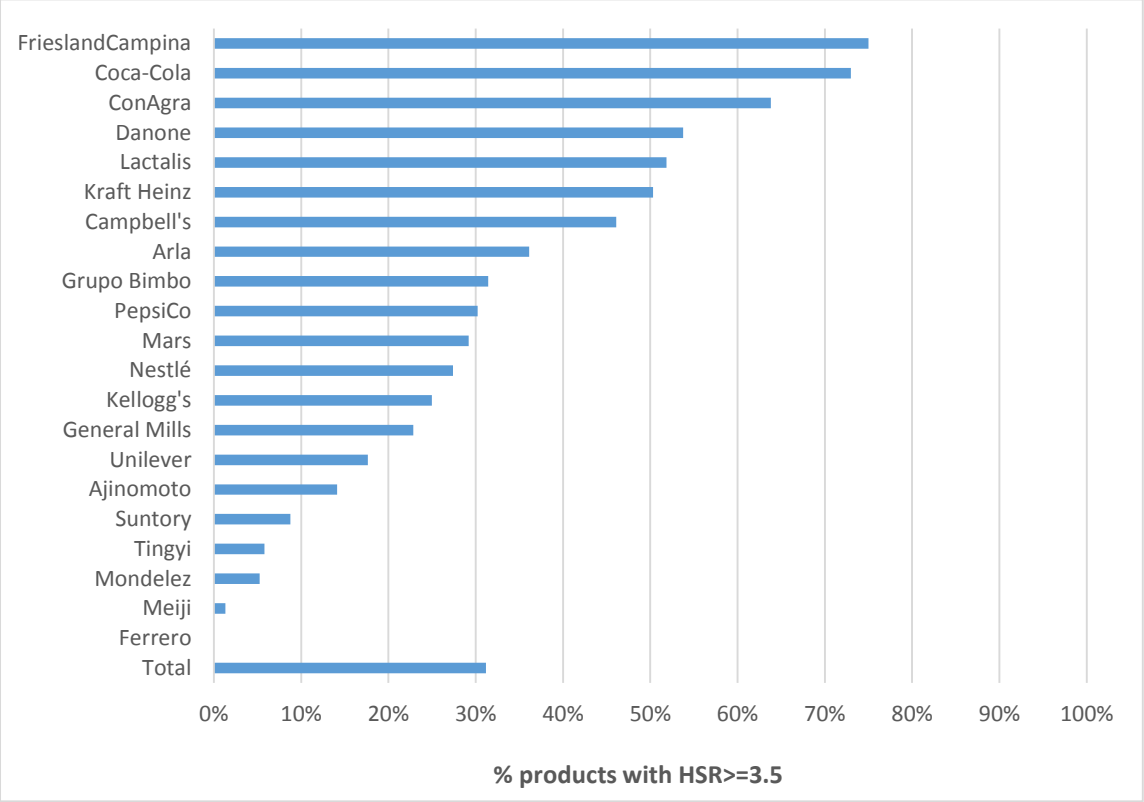


Figure J: *Proportion of 'healthy' products by company – beverages only*

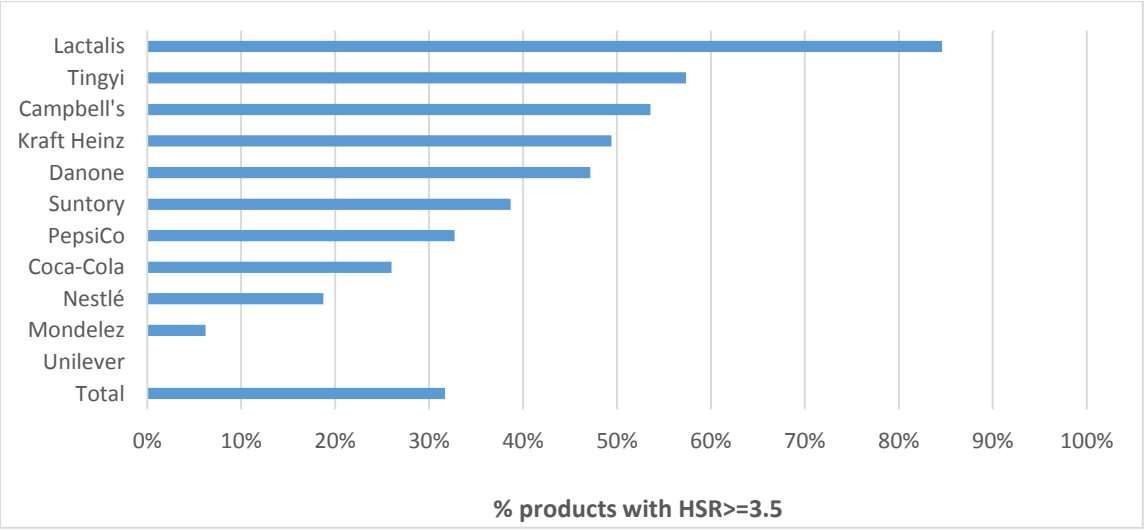


Figure K: *Proportion of 'healthy' products by country*

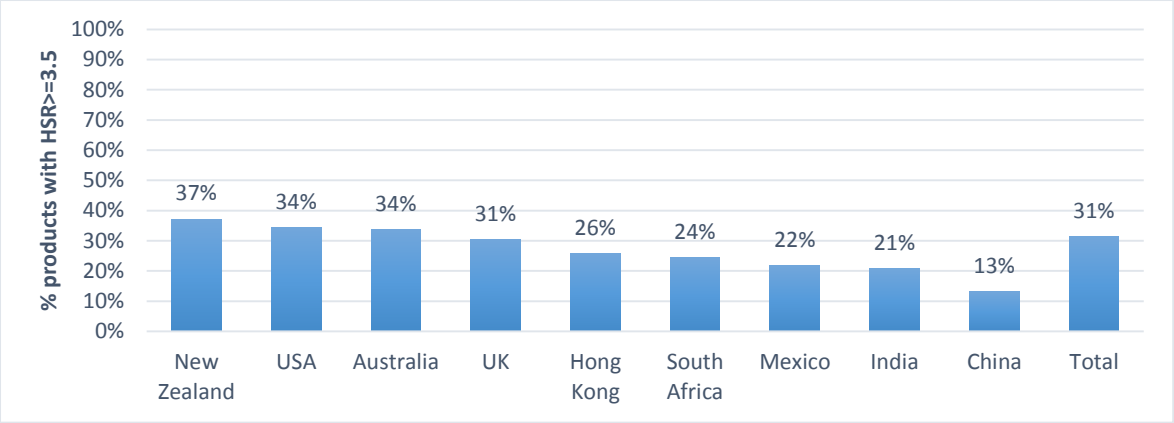


Figure L: *Proportion of 'healthy' products by country – foods only*

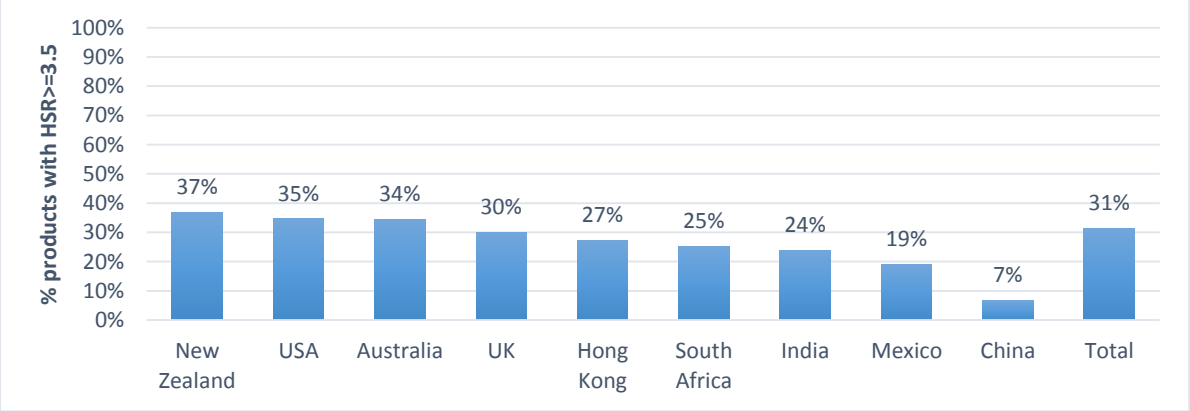
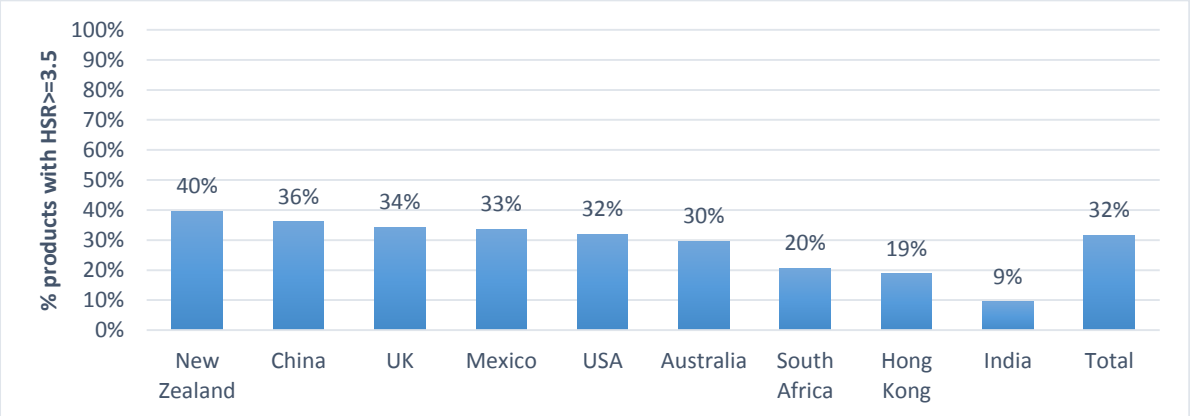


Figure M: *Proportion of 'healthy' products by country – beverages only*



New Zealand had the highest proportion of products achieving an HSR of 3.5 or above (Figure K). India and China had the lowest proportion of products available that achieved an HSR of 3.5 or above. Only 31% of products in all countries were classified as 'healthy' by this metric. Just as with the overall mean HSR findings, developed countries were at the top of the rankings, with developing countries ranked last. Interestingly, when foods and beverages were examined separately the results changed somewhat, with China having the lowest proportion of food products considered "healthy" yet the second highest proportion of beverage products considered 'healthy'.

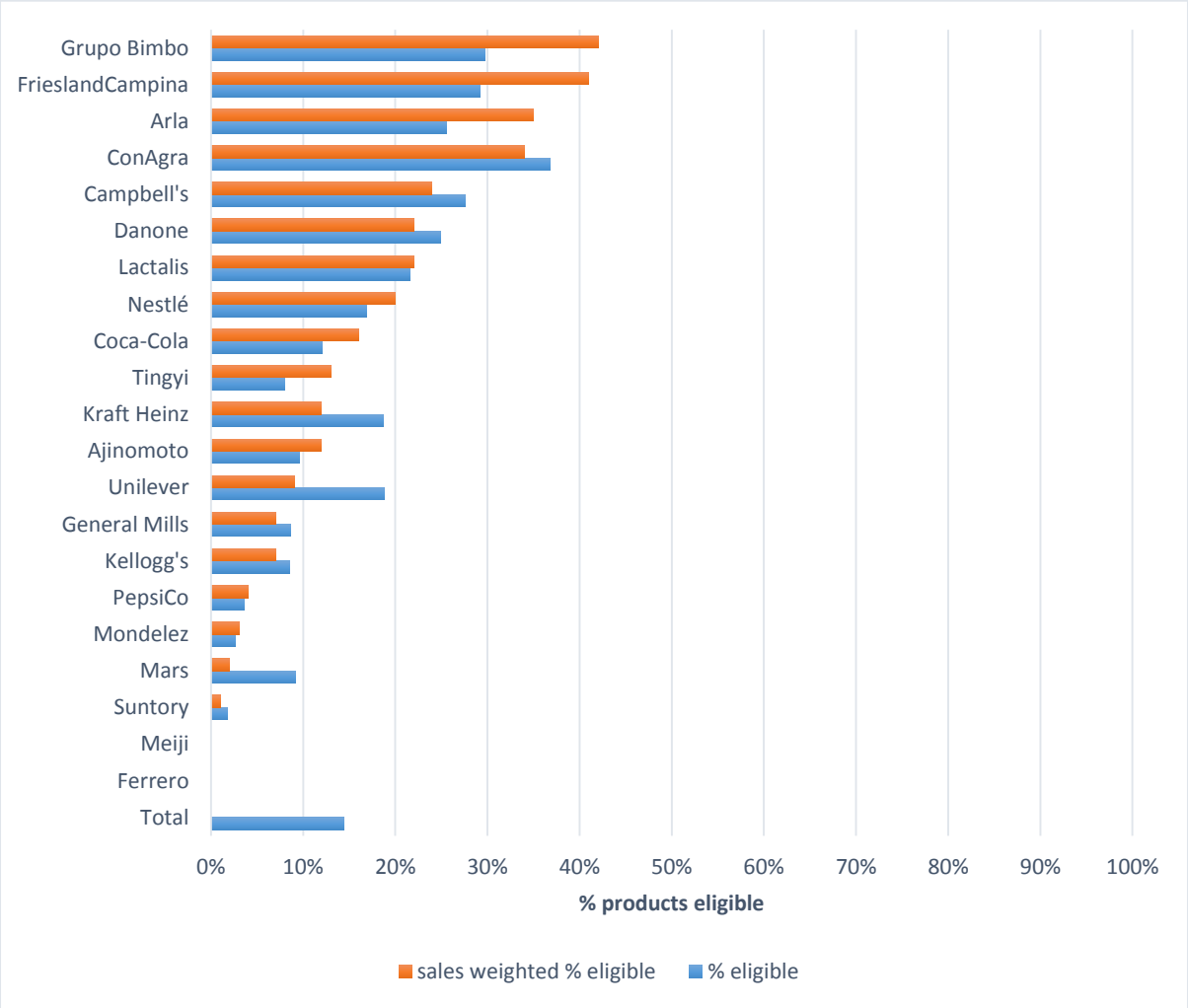
Table K: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country (not sales-weighted)*

	AU	CN	HK	IN	MX	NZ	ZA	UK	US
Baked Goods	17%	15%	-	10%	35%	11%	8%	13%	29%
Bottled Water	24%	50%	40%	100%	17%	34%	35%	35%	33%
Breakfast Cereals	87%	79%	47%	51%	29%	71%	40%	64%	36%
Carbonates	6%	0%	15%	19%	0%	3%	0%	9%	14%
Concentrates	33%	0%	0%	0%	10%	0%	-	0%	-
Confectionery	4%	3%	22%	4%	11%	6%	17%	3%	0%
Dairy	49%	7%	54%	50%	36%	28%	38%	48%	51%
Edible Oils	-	-	-	75%	100%	-	-	-	-
Ice Cream and Frozen Desserts	5%	1%	0%	2%	0%	0%	4%	0%	8%
Juice	63%	98%	42%	0%	100%	77%	81%	72%	51%
Other Hot Drinks	18%	-	-	9%	-	14%	16%	8%	-
Processed Fruit and Vegetables	99%	-	100%	100%	-	99%	-	100%	98%
Processed Meat and Seafood	-	0%	-	0%	-	-	5%	0%	-
RTD Coffee	100%	0%	0%	-	0%	-	-	-	-
RTD Tea	0%	0%	0%	0%	-	-	0%	0%	-
Ready Meals	78%	-	25%	100%	0%	81%	33%	64%	50%
Rice, Pasta and Noodles	89%	0%	-	9%	-	64%	0%	87%	53%
Sauces, Dressings and Condiments	31%	3%	10%	22%	18%	32%	18%	28%	33%
Savoury Snacks	43%	21%	28%	24%	18%	13%	3%	5%	28%
Soup	57%	0%	60%	82%	26%	73%	54%	90%	64%
Sports and Energy Drinks	2%	0%	0%	0%	0%	-	0%	0%	0%
Spreads	33%	-	50%	33%	0%	24%	0%	0%	0%
Sweet Biscuits, Snack Bars and Fruit Snacks	8%	0%	7%	0%	3%	17%	0%	8%	6%

Table K above shows the proportion of products in each country considered “healthy” by Euromonitor subset.

ANALYSIS 5 and 6: *Corporate and country rankings based upon proportions of products meeting WHO Euro criteria*

Figure N: *Proportions of products meeting WHO Euro criteria for marketing to children – by company*



A very low proportion of products offered by the nine companies overall could be marketed to children using the WHO Euro criteria (Figure N). ConAgra's comparatively high result was made up predominantly of 'Ready Meals' and 'Processed Fruit and Vegetable' products. Other products eligible for marketing included healthier dairy products from FrieslandCampina, Danone and Lactalis and Grupo Bimbo's plain bread products. Categories such as 'Confectionery', many 'Spreads' and many 'Sweet Biscuits, Snack Bars and Fruit Snacks' are not eligible for marketing under WHO Euro irrespective of nutrient content, affecting the companies that make a large number of these product such as Ferrero, Meiji and Mondelez.

Note that these results do not imply that any of the companies marketed (or did not market) these products to children. Rather, the model provides a useful supplementary method to assess the healthiness of products.

Figure O: *Proportions of products meeting WHO Euro criteria for marketing to children – by company, foods only*

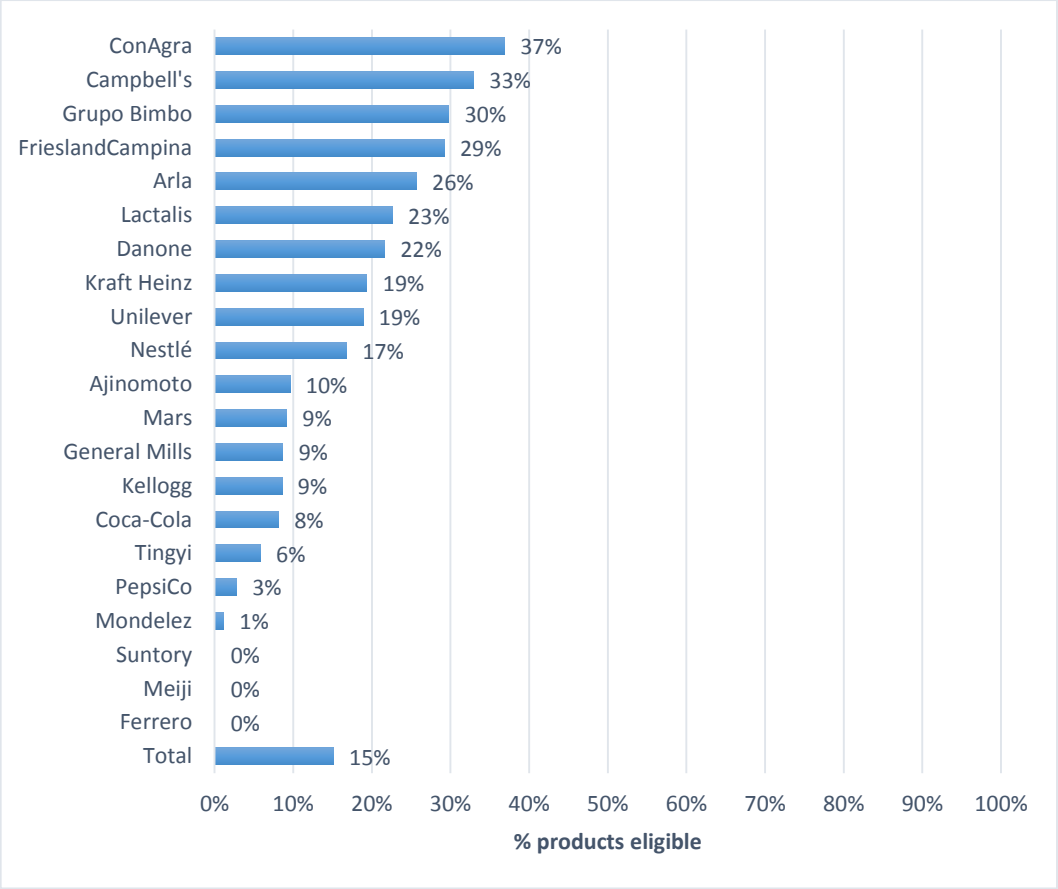
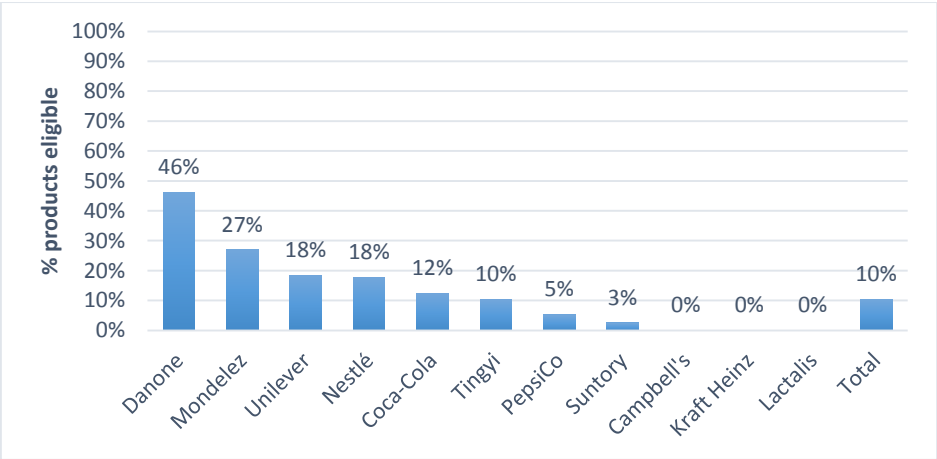


Figure P: *Proportions of products meeting WHO Euro criteria for marketing to children – by company, beverages only*



When results were examined by foods (Figure O) and beverages (Figure P) separately, ConAgra had the highest proportion of food products eligible for marketing to children (37%) followed by Campbell's with 33%. Campbell's and Lactalis, despite having a higher proportion of foods eligible for marketing to children compared to many other companies had the lowest proportion of beverage products (0%) eligible. A higher proportion of food products (15%) compared to beverage products (10%) were eligible for marketing to children overall.

Figure Q: *Proportions of products meeting WHO Euro criteria for marketing to children by country*

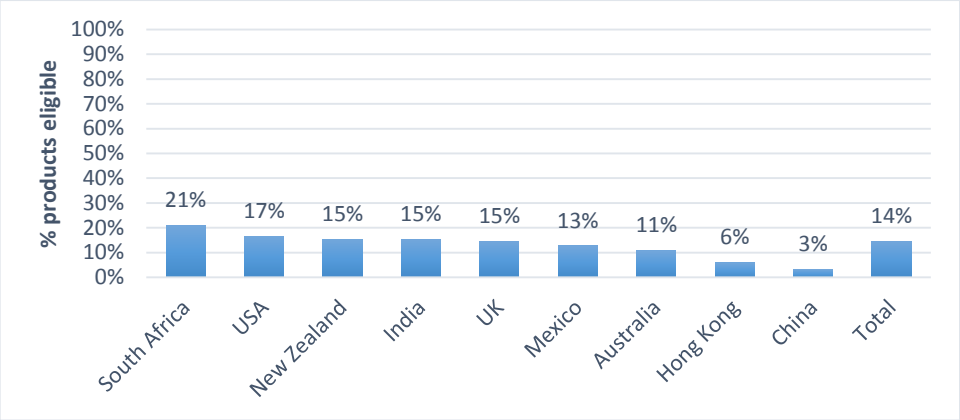


Figure R: *Proportions of products meeting WHO Euro criteria for marketing to children – by country, foods only*

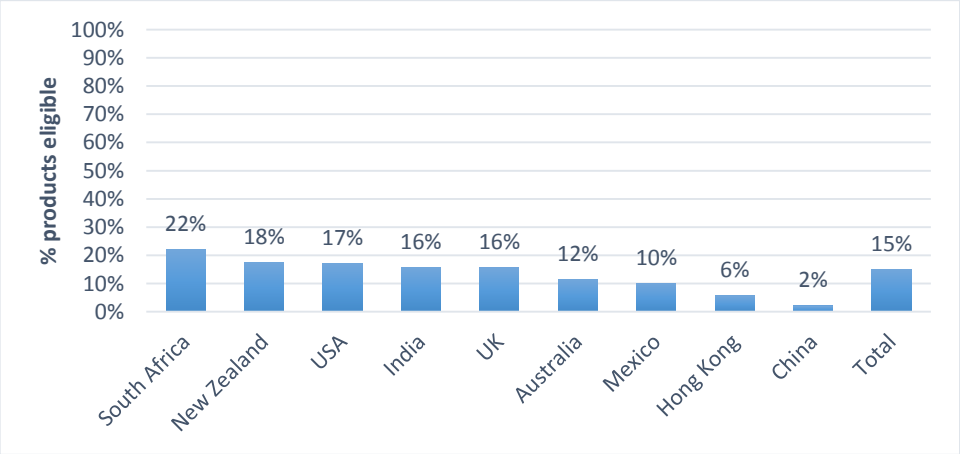
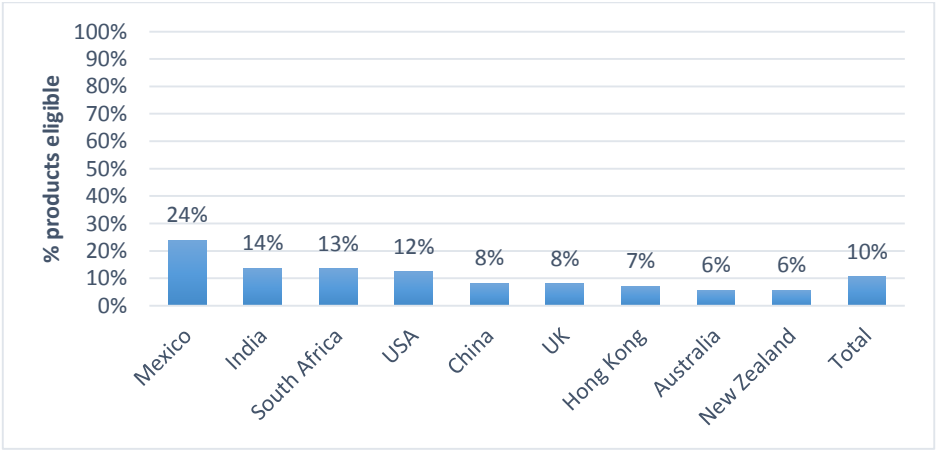


Figure S: *Proportions of products meeting WHO Euro criteria for marketing to children – by country, beverages only*



A low proportion of products across all countries in this analysis overall (14%) would be eligible for marketing to children under WHO Euro criteria (Figure Q). No country scored well using this nutrient profiling method. The country that had the highest proportion overall of products that could be marketed to children was South Africa at 21%, followed by the USA at 17%. Hong Kong and China were the only

countries with <10% of products eligible for marketing to children. Country rankings changed somewhat when results were examined separately for foods (Figure R) and beverages (Figure S), with New Zealand a country with one of the highest proportions of food products eligible for marketing to children, yet the lowest proportion of beverages. Mexico showed the opposite trend, with the highest proportion of beverage products eligible (24%) yet a relatively lower proportion of food products (10%).

Table L: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country (not sales-weighted)*

	AU	CN	HK	IN	MX	NZ	ZA	UK	US
Baked Goods	6%	30%	-	10%	44%	7%	33%	10%	6%
Bottled Water	24%	50%	40%	100%	28%	53%	35%	52%	24%
Breakfast Cereals	26%	43%	15%	42%	7%	23%	33%	21%	26%
Carbonates	5%	2%	6%	37%	8%	8%	22%	5%	5%
Concentrates	0%	0%	0%	0%	85%	0%	-	0%	0%
Confectionery	0%	0%	1%	0%	0%	0%	0%	0%	0%
Dairy	21%	7%	10%	10%	10%	67%	26%	23%	21%
Edible Oils	-	-	-	100%	100%	-	-	-	-
Ice Cream and Frozen Desserts	0%	0%	0%	0%	0%	0%	0%	0%	0%
Juice	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other Hot Drinks	0%	-	-	0%	-	0%	0%	1%	0%
Processed Fruit and Vegetables	15%	-	0%	0%	-	19%	-	0%	15%
Processed Meat and Seafood	-	-	33%	-	11%	-	79%	-	-
RTD Coffee	0%	0%	0%	-	-	0%	-	-	0%
RTD Tea	44%	9%	11%	-	40%	-	0%		44%
Ready Meals	78%	-	0%	100%	0%	89%	0%	67%	78%
Rice, Pasta and Noodles	72%	0%	-	73%	-	64%	0%	96%	72%
Sauces, Dressings and Condiments	0%	0%	0%	0%	0%	0%	15%	1%	0%
Savoury Snacks	0%	0%	0%	0%	0%	0%	0%	0%	0%
Soup	79%	0%	73%	95%	79%	98%	72%	96%	79%
Sports and Energy Drinks	7%	0%	0%	-	15%	4%	0%	6%	7%
Spreads	0%	-	0%	0%	0%	0%	0%	0%	0%
Sweet Biscuits, Snack Bars and Fruit Snacks	0%	0%	0%	0%	0%	0%	0%	0%	0%

Table L shows the proportion of products eligible for marketing to children using the WHO Euro criteria in each country by Euromonitor subset. In some categories there was a wide range in the proportion of products eligible by country (e.g. breakfast cereals ranging from 7-43%), which likely illustrates that the product range within each category can vary significantly between countries and perhaps the nutritional content of similar products could also vary greatly, highlighting areas in greater need of reformulation.

RESULTS BY COMPANY

COMPANY 1: AJINOMOTO

Products included

There were 101 identified products manufactured by Ajinomoto in four countries. Out of the 101 products included in analysis, there was sufficient nutrient information for 92 products to generate a Health Star Rating and for 94 to generate results for the WHO Euro analysis. There were seven products (7%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 1.1 shows the breakdown of products in each category by country.

Table 1.1 *Number of Ajinomoto products by country in Euromonitor categories*

	Ready Meals	Rice, Pasta and Noodles	Sauces, Dressings and Condiments	**Total**	**% sales***
China	-	-	2	**2**	**100%**
Hong Kong	7	-	54	**61**	**100%**
South Africa	-	-	8	**8**	**100%**
UK	-	8	22	**30**	**100%**
Total	**7**	**8**	**86**	**101**	**100%**

* Note that this value indicates % sales from included categories for each country

The four countries used in this analysis represented 3% of Ajinomoto's total global food and beverage sales in 2016. Of these four countries, South Africa represents by far the lowest revenue (less than $2 million). Its main and home market (Japan) is not included in the analysis. Within each country, the included categories represented 100% of product sales, however it is unknown whether we have captured every product for sale in every category. Of the three product categories that are covered, 'Sauces, Dressings and Condiments' represents the largest amount of products and the highest sales value.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Ajinomoto products and sales-weighted mean nutrient profile of Ajinomoto products*

Figure 1.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Ajinomoto products*

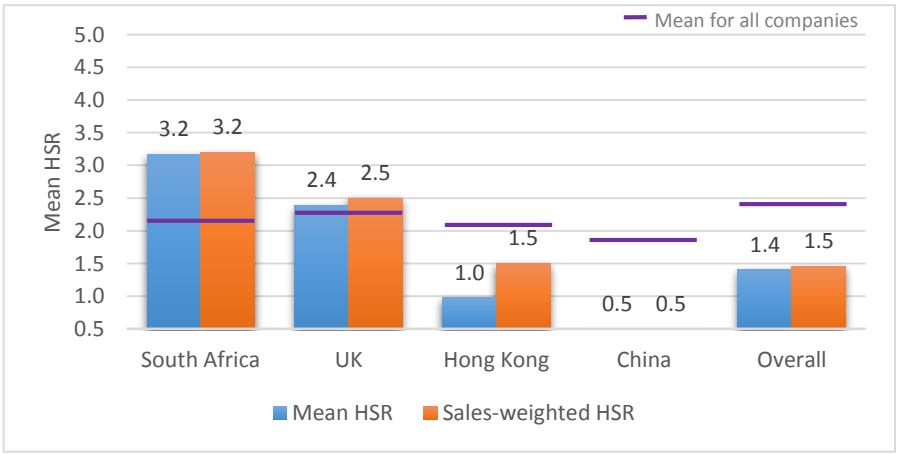
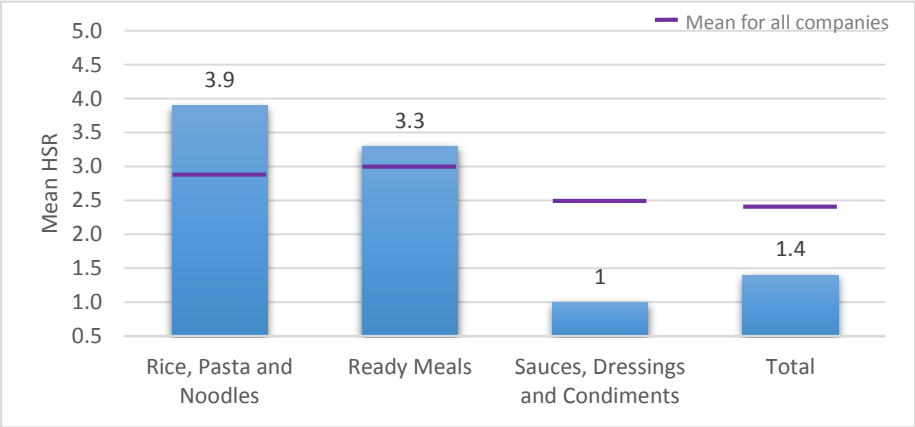


Figure 1.2 *Mean Health Star Rating by category for Ajinomoto products*



Ajinomoto had a low overall mean HSR of 1.4 which increased slightly to 1.5 when results were weighted by sales (Figure 1.1) illustrating that its products with slightly higher HSRs account for a relatively larger proportion of sales than those with lower HSRs. Out of the four countries included in Ajinomoto's analysis, South Africa had the highest mean HSR both before and after results were weighted by sales (3.2), followed by the UK with a mean HSR of 2.4, with China having the lowest mean HSR of 0.5. When Ajinomoto's results were examined by category (Figure 1.2), the highest mean HSR was seen in the 'Rice, Pasta and Noodles' category (3.9), followed by 'Ready Meals' (3.3), with 'Sauces, Dressings and Condiments' having the lowest mean HSR of all Ajinomoto product categories (1.0). Note that all analyses were done using data per 100g/mL, which is an important consideration for Ajinomoto as 'Sauces, Dressings and Condiments' are consumed in small amounts and so likely contribute less to daily nutrient intake compared to other food categories. However, the 'Sauces, Dressings and Condiments' category represents more than three times the sales of the 'Rice, Pasta and Noodles' and 'Ready Meals' categories combined.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Ajinomoto products considered "healthy" and sales-weighted proportion of Ajinomoto products considered "healthy"*

Figure 1.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Ajinomoto products*

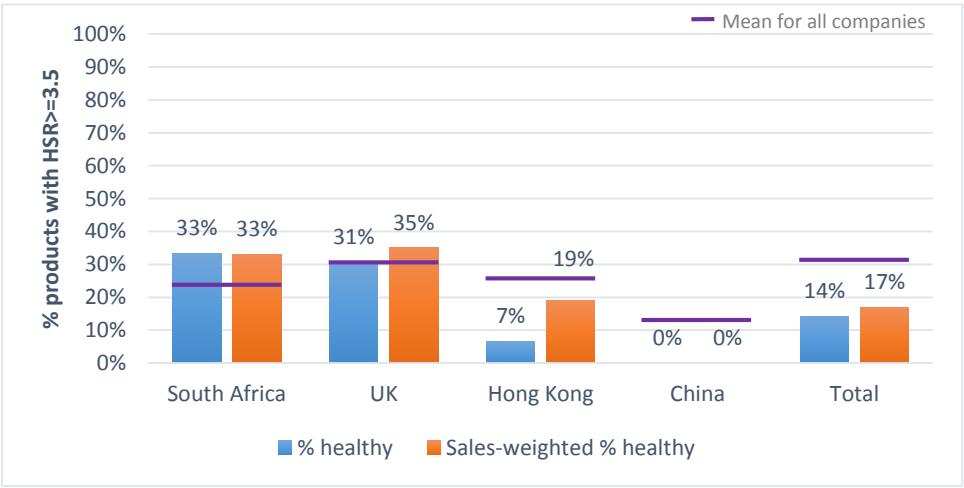
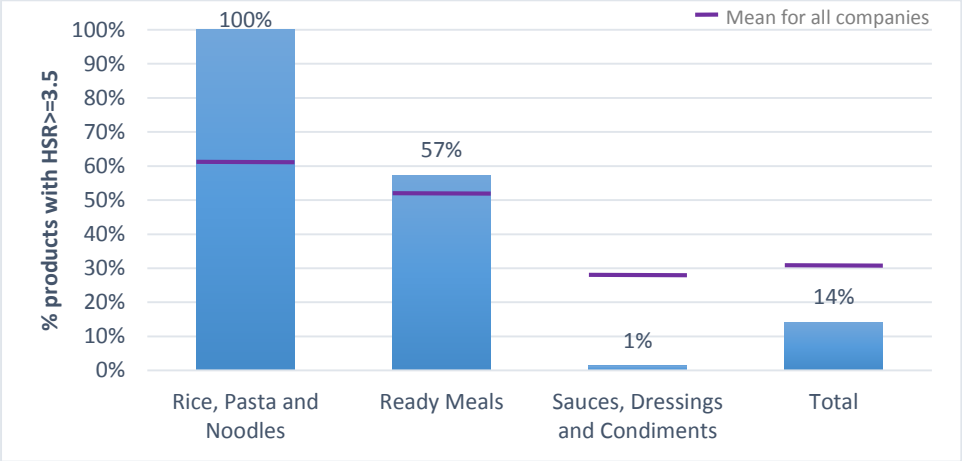


Figure 1.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Ajinomoto products*



Overall, Ajinomoto had a low proportion of sales in all four countries with an HSR of 3.5 or greater (14%), which increased slightly to 17% when results were weighted by sales (Figure 1.3) again illustrating that products of higher nutritional quality account contributed more to annual 2016 sales than products of lower nutritional quality. Ajinomoto South Africa had both the highest mean HSR of all countries as well as the highest proportion of products receiving an HSR of 3.5 or more (33%). However, when results were weighted by sales, the UK ranked highest in terms of the country with the highest proportion of products considered 'healthy', with 35%. No products in China received an HSR of 3.5 or above. The UK's better result is likely fuelled by the product types available within that country. For example, Figure 1.4 shows that the 'Rice, Pasta and Noodles' category had 100% of products receiving an HSR of 3.5 or more, followed by 'Ready Meals' with 57% and only 1% of 'Sauces, Dressings and Condiments'. The UK was the only country in which 'Rice, Pasta and Noodle' products were sold.

ANALYSIS 5 and 6: *Country and category rankings based upon proportion of Ajinomoto products meeting WHO Euro criteria*

Figure 1.5 *Proportions of Ajinomoto products meeting WHO Euro criteria for marketing to children – by Country*

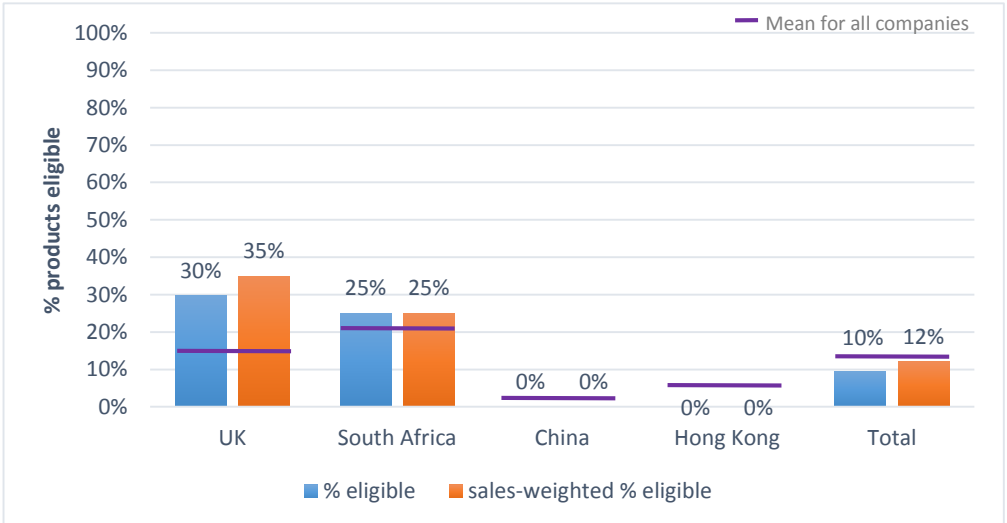
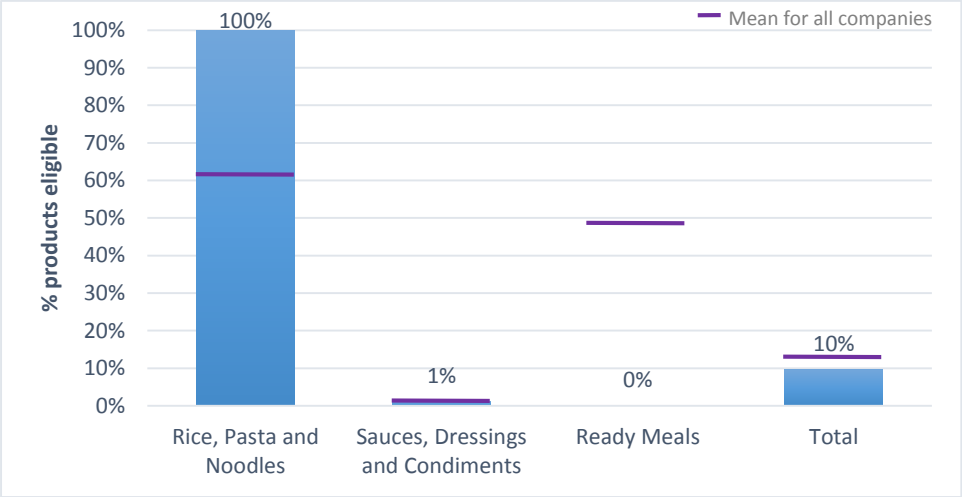


Figure 1.6 *Proportions of Ajinomoto products meeting WHO Euro criteria for marketing to children – by Category*



Overall a very low proportion of Ajinomoto products (10%) were eligible for marketing to children (Figure 1.5), increasing slightly to 12% when results were weighted by sales. The UK had the highest proportion of products eligible for marketing to children (30%) followed by South Africa with 25%, with China and Hong Kong both selling zero products that were eligible for marketing to children. Rankings did not change when sales-weighting was applied. Once again, these results were driven by the fact that Ajinomoto sold 'Rice, Pasta and Noodle' products in the UK and not in the remaining countries, with 100% of 'Rice, Pasta and Noodle' products eligible for marketing to children under the WHO Euro criteria yet only 1% of 'Sauces, Dressings and Condiments' and zero 'Ready Meal' products eligible.

More specific results broken down by company and country for Ajinomoto can be seen in Appendix B.

COMPANY 2: ARLA

Products included

There were 132 identified products manufactured by Arla in four countries. Out of the 132 products included in analysis, there was sufficient nutrient information for 108 products to generate a Health Star Rating and for 121 to generate results for the WHO Euro analysis. There were 11 products (8%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 2.1 shows the breakdown of products in each category by country.

Table 2.1 *Number of Arla products by country in Euromonitor categories*

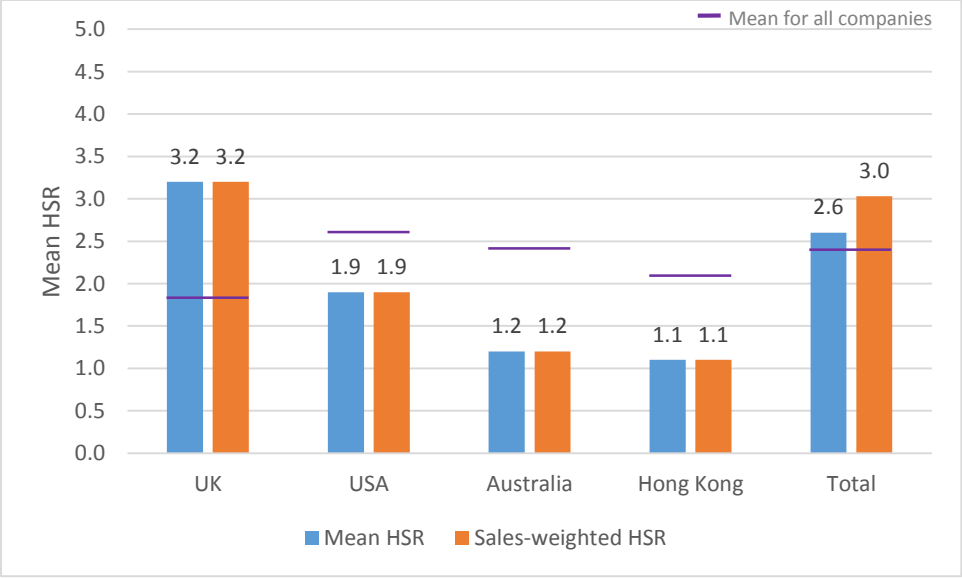
	Dairy	Total	% sales*
Australia	12	**12**	**100%**
Hong Kong	9	**9**	**100%**
UK	80	**80**	**100%**
USA	31	**31**	**100%**
Total	**132**	**132**	**100%**

* Note that this value indicates % sales from included categories for each country

The four countries used in this analysis represented 10% of Arla's total global food and beverage sales in 2016. Of these four countries, the UK represents the largest revenue (more than $500 million) and Hong Kong the lowest revenue (just over $2 million). The main markets for Arla, based in Northern Europe, were not included in this study. Within each country, the included categories represented 100% of product sales, however it is unknown whether we have captured every product for sale in every country.

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

Figure 2.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Arla products*

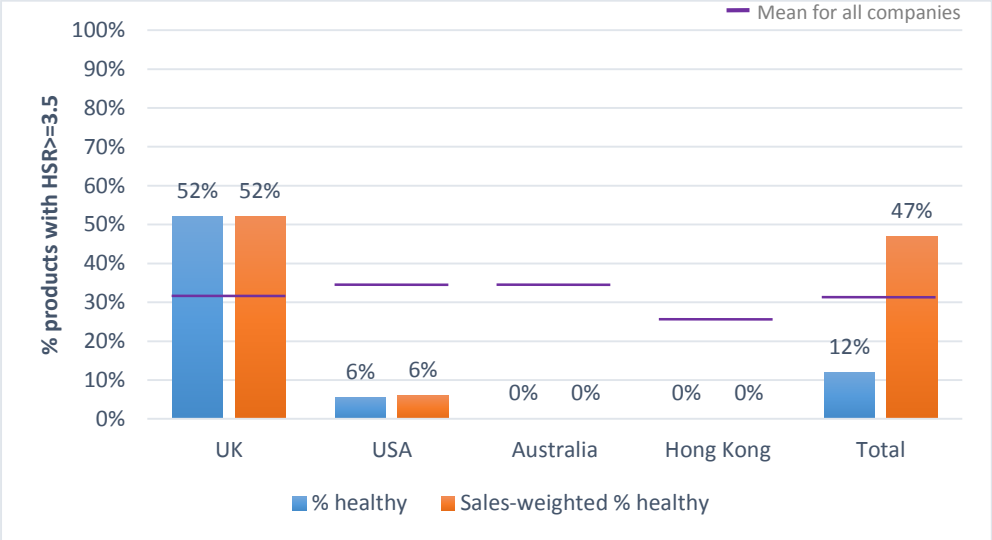


Arla's overall mean HSR was 2.6, which increased to 3.0 when results were weighted by sales (Figure 2.1) illustrating that its products with higher HSRs account for a relatively larger proportion of sales than those with lower HSRs. Out of the four countries included in Arla's analysis, the UK had the highest mean HSR

both before and after results were weighted by sales (3.2), followed by the USA with a mean HSR of 1.9, with Hong Kong having the lowest mean HSR of 1.1. The UK represented more than 80% of sales of the four countries combined, and contributed the majority of all products assessed. Note that Arla sold only products in one Euromonitor subset (Dairy) and so an analysis by Euromonitor subset was not undertaken.

ANALYSIS 3 and 4: *Country rankings based upon proportion of Arla products considered "healthy" and sales-weighted proportion of Arla products considered "healthy"*

Figure 2.2 *Proportion of products considered "healthy" using the Health Star Rating by country for Arla products*

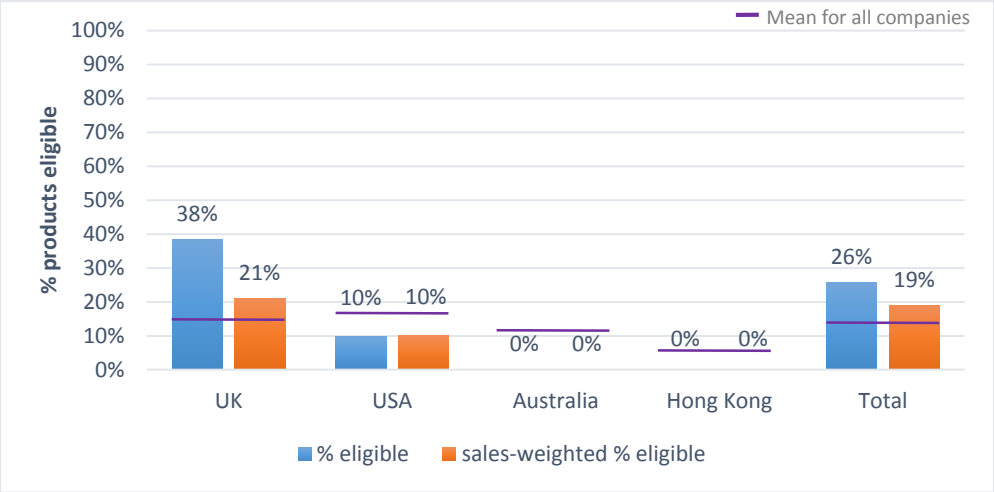


Overall, Arla had a low proportion of sales in all four countries with an HSR of 3.5 or greater (12%), which increased significantly to 47% when results were weighted by sales (Figure 2.2) again illustrating that products of higher nutritional quality contributed much more to annual 2016 sales than products of lower nutritional quality. Arla UK had both the highest mean HSR of all countries as well as the highest proportion of products receiving an HSR of 3.5 or more (52%). When results were weighted by sales, the UK still ranked highest in terms of the country with the highest proportion of products considered 'healthy'. No products in Australia or Hong Kong received an HSR of 3.5 or above. The UK's better result is likely fuelled by the healthier dairy product types (yoghurt and milk) available within that country compared to the remaining three countries which had product lists dominated by cheese products which contain higher levels of sodium and saturated fat than other types of dairy products.

Note that Arla sold only products in one Euromonitor subset (Dairy) and so an analysis by Euromonitor subset was not undertaken.

ANALYSIS 5 and 6: *Country and company rankings based upon proportion of Arla products meeting WHO Euro criteria*

Figure 2.3 *Proportions of Arla products meeting WHO Euro criteria for marketing to children – by Country*



Overall a low proportion of Arla products (26%) was eligible for marketing to children (Figure 2.3), which decreased to 19% when results were weighted by sales. The UK had the highest proportion of products eligible for marketing to children (38%) followed by the USA with 10%, with Australia and Hong Kong both selling zero products that were eligible for marketing to children. Once again, these results were driven by the fact that Arla UK sold products such as yoghurts and dairy milk whereas Australia and Hong Kong sold only cheese products. Note that Arla sold only products in one Euromonitor subset (Dairy) and so an analysis by Euromonitor subset was not undertaken.

More specific results broken down by company and country for Arla can be seen in Appendix B.

COMPANY 3: CAMPBELL'S

Products included

There were 1,533 identified products manufactured by Campbell's in seven countries. There was sufficient nutrient information for 1,462 products to generate a Health Star Rating and for 1,469 to generate results for the WHO Euro analysis. There were 64 products (4%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 3.1 shows the breakdown of products in each category by country.

Table 3.1 *Number of Campbell's products by country in Euromonitor categories*

	Baked Goods	Juice	Ready Meals	Sauces, Dressings and Condiments	Savoury Snacks	Soup	**Total**	**% Sales***
Australia	-	16	-	1	62	70	**238**	**100%**
Hong Kong	-	3	-	15	-	11	**29**	**67%**
India	-	-	-	-	-	3	**3**	**100%**
Mexico	-	9	-	3	-	28	**40**	**100%**
New Zealand	-	-	12	11	86	28	**202**	**100%**
UK	-	3	-	-	-	26	**29**	**100%**
USA	159	208	-	262	62	301	**992**	**89%**
Total	**159**	**239**	**12**	**292**	**210**	**467**	**1,533**	**90%**

* Note that this value indicates % sales from included categories for each country

The seven countries used in this analysis represented 89% of Campbell's total global food and beverage sales in 2016. Of these seven countries, the USA represented the highest revenue (more than $6 billion) and India the lowest revenue (less than $1 million). Within each country, the included categories represented between 67% and 100% of product sales, however it is unknown whether we have captured every product for sale in every country. An important point to note is that 'Ready Meals' has the lowest sales of all categories included in this analysis, with <$1 million, compared to 'Soup' which represented over $2 billion, and 'Sweet Biscuits, Snack Bars and Fruit Snacks' which represented around $0.5 billion for Campbell's in 2016.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Campbell's products and sales-weighted mean nutrient profile of Campbell's products*

Figure 3.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Campbell's products*

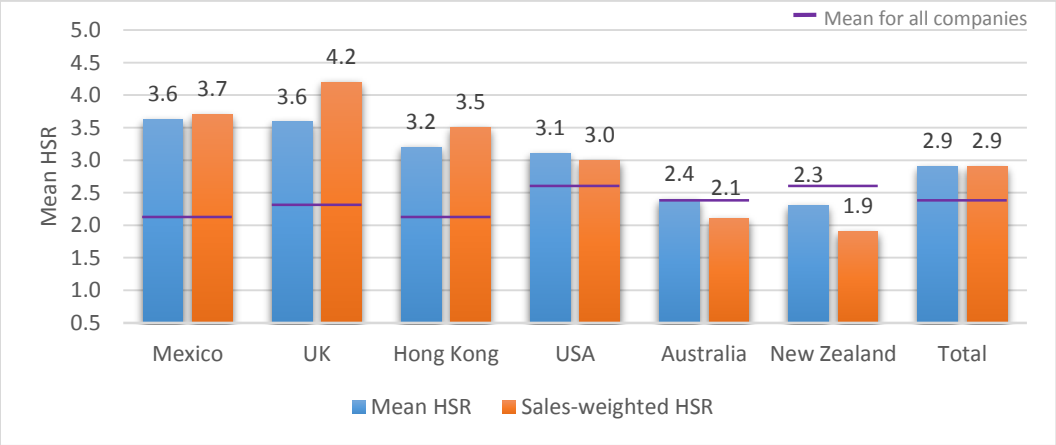
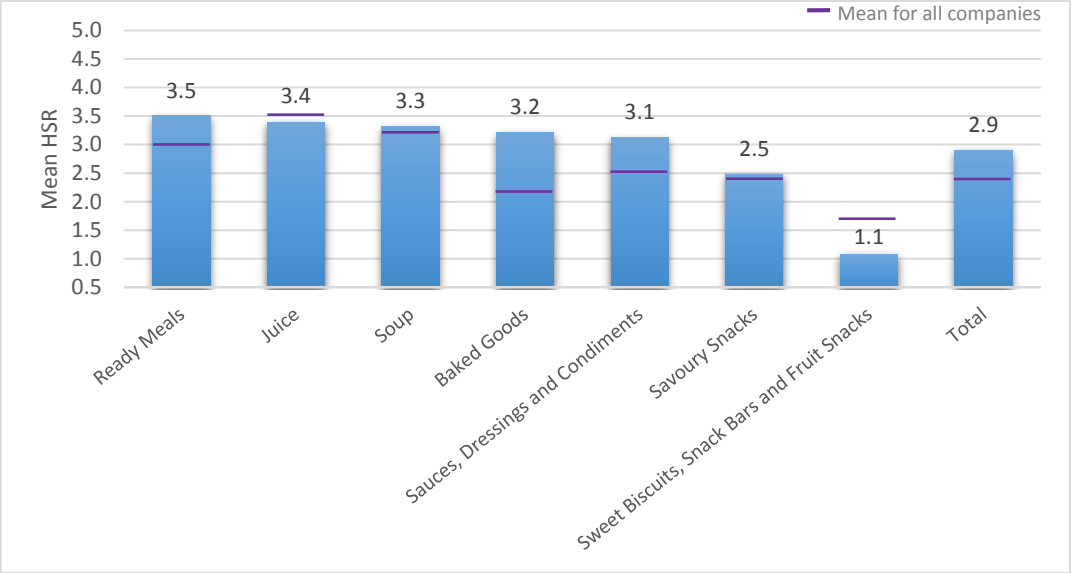


Figure 3.2 *Mean Health Star Rating by category for Campbell's products*



Campbell's had an overall mean HSR of 2.9 which remained the same when results were weighted by sales (Figure 3.1). Out of the six countries included in Campbell's analysis, Mexico and the UK had the highest mean HSR before results were weighted by sales (3.6) but after results were weighted by sales the UK had the highest mean HSR (4.2). New Zealand had the lowest HSR both before and after sales-weighting was applied (2.3 and 1.9). When Campbell's results were examined by category (Figure 3.2), the highest mean HSR was seen in the 'Ready Meals' (3.5) category, followed by 'Juice' (3.4), with 'Sweet Biscuits, Snack Bars and Fruit Snacks' having the lowest mean HSR of all Campbell's product categories (1.1).

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Campbell's products considered "healthy" and sales-weighted proportion of Campbell's products considered "healthy"*

Figure 3.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Campbell's products*

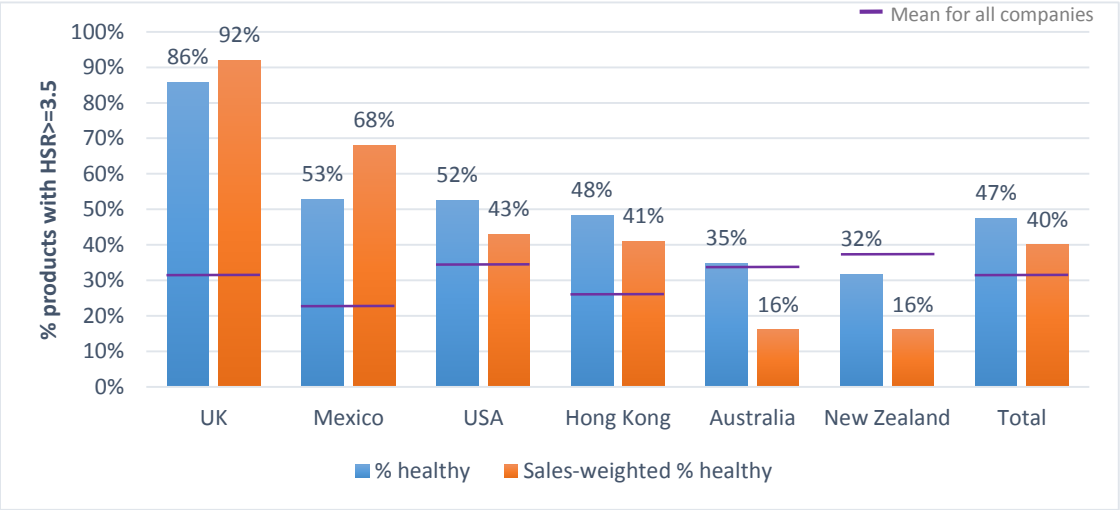
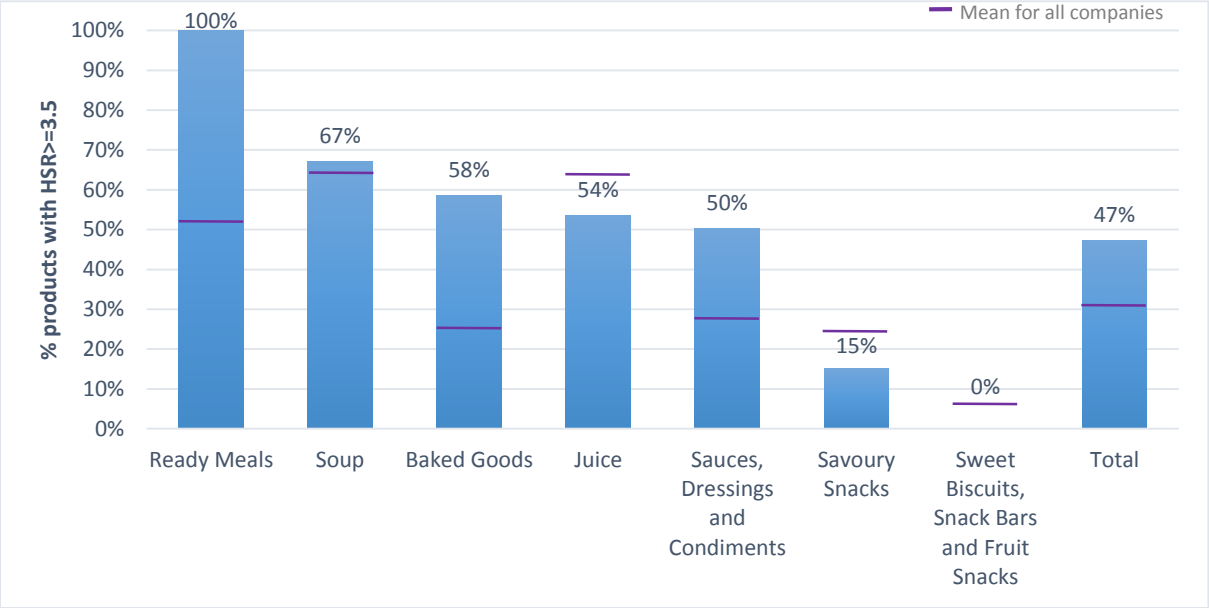


Figure 3.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Campbell's products*



Overall, just under half (47%) of all Campbell's products across the six countries had an HSR of 3.5 or greater, which decreased slightly to 40% when results were weighted by sales (Figure 3.3) illustrating that products of lower nutritional quality may have contributed more to annual 2016 sales than products of higher nutritional quality. Campbell's UK had far and above the highest proportion of products receiving an HSR of 3.5 or more (86%), increasing to 92% when results were weighted by sales. Both Australia and New Zealand saw a large decrease in the proportion of products with HSR>=3.5 once sales-weighting of results was undertaken, indicating that product sales in these two countries derive mainly from less healthy items than in countries like Mexico and the UK. Not surprisingly when results were examined by category, healthier product categories such as 'Ready Meals' and 'Soup' had a much higher proportion of products considered "healthy" compared to less healthy product categories such as 'Savoury Snacks' and 'Sweet Biscuits, Snack Bars and Fruit Snacks' (Figure 3.4).

ANALYSIS 5 and 6: *Country and company rankings based upon proportion of Campbell's products meeting WHO Euro criteria*

Figure 3.5 *Proportions of Campbell's products meeting WHO Euro criteria for marketing to children – by Country*

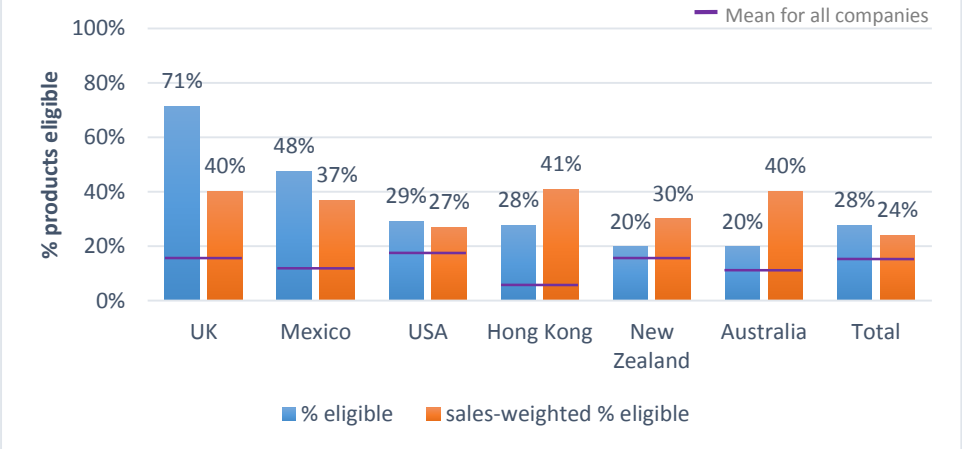
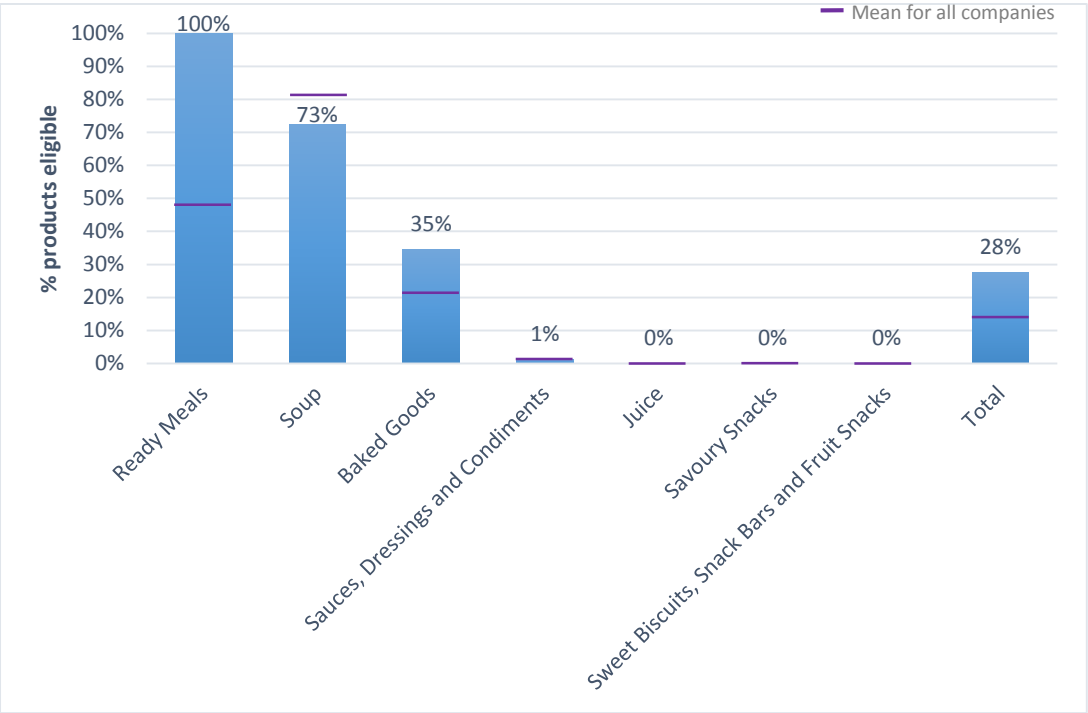


Figure 3.6 *Proportions of Campbell's products meeting WHO Euro criteria for marketing to children – by Category*



Overall a low proportion of Campbell's products (28%) were eligible for marketing to children (Figure 3.5), decreasing slightly to 24% when results were weighted by sales. The UK had the highest proportion of products eligible for marketing to children (71%) followed by Mexico with 48%, and Australia and New Zealand the lowest proportion. However, when sales-weighting was undertaken, the rankings changed somewhat, with the UK falling from 71% to 40% placing it behind Hong Kong with 41%. These results indicate that although Campbell's UK had a larger number of products that were eligible for marketing to children compared to other countries, that sales are in fact driven by less healthy products. When results were examined by food category, similar results to the previous finding for products receiving >=3.5 HSR were observed.

More specific results broken down by company and country for Campbell's can be seen in Appendix B.

COMPANY 4: COCA-COLA

Products included

There were 1,245 identified products manufactured by Coca-Cola in nine countries. There was sufficient nutrient information for 1,188 products to generate a Health Star Rating and for 1,219 to generate results for the WHO Euro analysis. There were 26 products (2%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 4.1 shows the breakdown of products in each category by country.

Table 4.1 *Number of Coca-Cola products by country in Euromonitor categories*

	Bottled Water	Carbonates	Concentrates	Dairy	Juice	Processed Fruit and Veg	RTD Tea	Sports and Energy Drinks	**Total**	**% sales***
Australia	14	77	-	-	20	40	-	16	**167**	**99%**
China	7	28	-	14	16	-	-	6	**71**	**99%**
Hong Kong	7	38	-	2	9	-	3	-	**59**	**98%**
India	2	18	-	-	13	-	-	-	**33**	**100%**
Mexico	3	40	-	21	59	-	-	16	**139**	**99%**
New Zealand	15	56	18	-	52	-	-	19	**160**	**100%**
South Africa	22	41	-	-	6	-	6	11	**86**	**100%**
UK	11	57	11	-	72	-	-	9	**160**	**100%**
USA	59	72	-	-	158	-	53	28	**370**	**100%**
Total	**140**	**427**	**29**	**37**	**405**	**40**	**62**	**105**	**1,245**	**99.6%**

* Note that this value indicates % sales from included categories for each country

The nine countries used in this analysis represented 47% of Coca-Cola's total global food and beverage sales in 2016. Of these nine countries, the USA represented by far the highest revenue (more than $20 billion), and New Zealand the lowest with less than $300 million. Within each country, the included categories represented between 98% and 100% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the eight product categories that are covered in this report, 'Carbonates' represents the largest number of products and the highest sales value.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Coca-Cola products and sales-weighted mean nutrient profile of Coca-Cola products*

Figure 4.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Coca-Cola products*

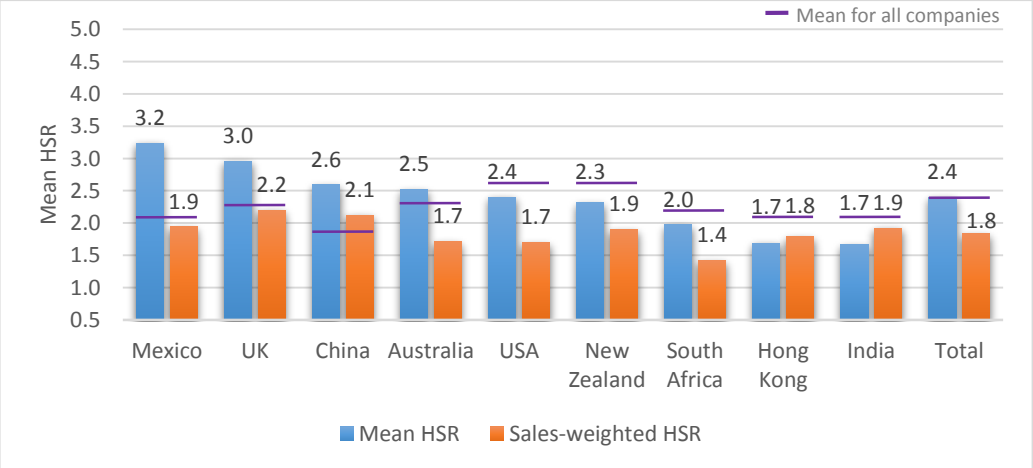
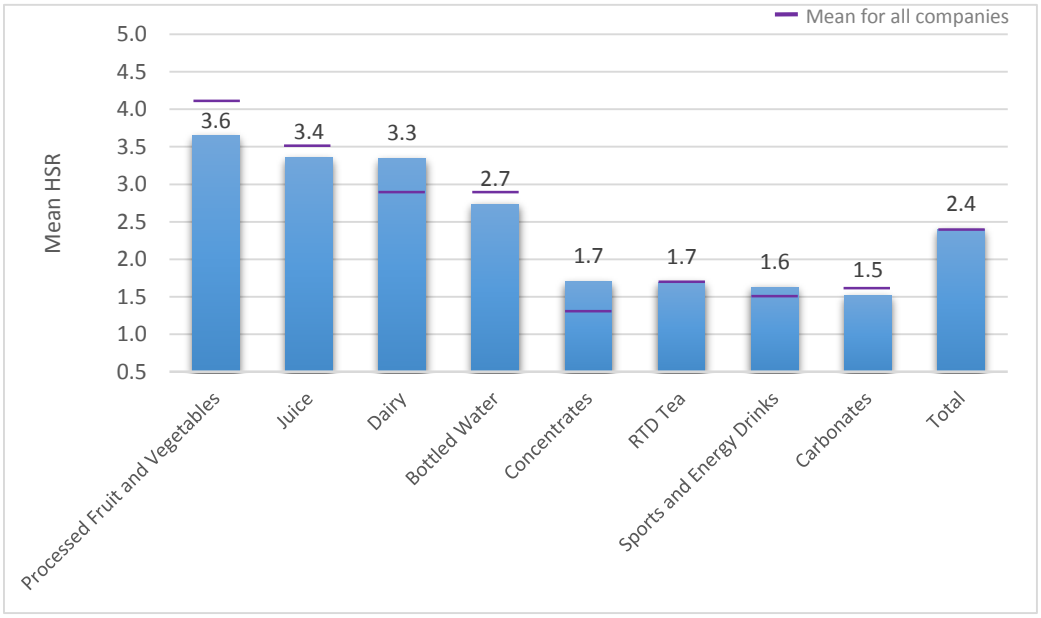


Figure 4.2 *Mean Health Star Rating by category for Coca-Cola products*



Coca-Cola products had an overall mean HSR of 2.4 which decreased to 1.8 when results were weighted by sales (Figure 4.1) illustrating that its products with lower HSRs account for a relatively larger proportion of sales than those with higher HSRs. Of the nine countries included in Coca-Cola's analysis, Mexico had the highest mean HSR (3.2) followed by the UK (3.0). However, when results were weighted by sales the ranking of countries changed, with the UK having the highest mean HSR (2.2) followed by China (2.1). Before sales-weighting, India and Hong Kong had the lowest mean HSR (1.7) however post sales-weighting South Africa had the lowest HSR (1.4). Seven of the nine countries had their overall mean HSR decrease following sales-weighting, indicating that the majority of product sales in those countries derived from less healthy products. When Coca-Cola's results were examined by category (Figure 4.2), the highest mean HSR was seen in the 'Processed Fruit and Vegetables' category (3.6), followed by 'Juice' (3.4) and 'Dairy' (3.3), with 'Carbonates' not surprisingly having the lowest mean HSR of all Coca-Cola product categories (1.5). Note that all analyses were done using data per 100g/mL, which is an important consideration for Coca-Cola as their soft drink products are likely consumed in amounts much greater than this by the consumer. Carbonates represented the largest selling category across the nine countries, with > $37 billion in 2016. This is in huge contrast to the highest ranked category 'Processed Fruit and Vegetables' which represented less than $100 million in sales across these nine countries in 2016. Products in this category included packaged fruit in juice/syrup.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Coca-Cola products considered "healthy" and sales-weighted proportion of Coca-Cola products considered "healthy"*

Figure 4.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Coca-Cola products*

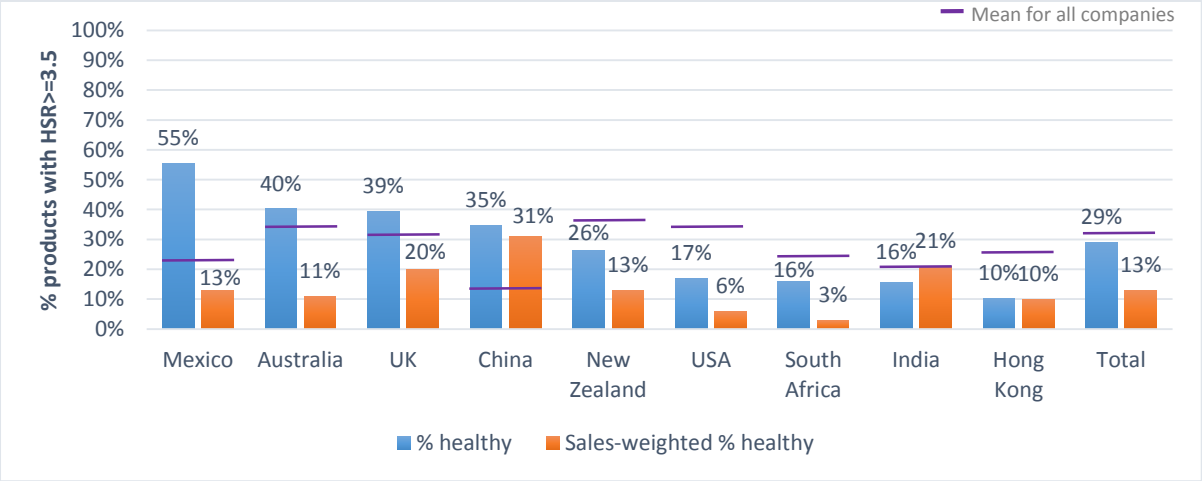
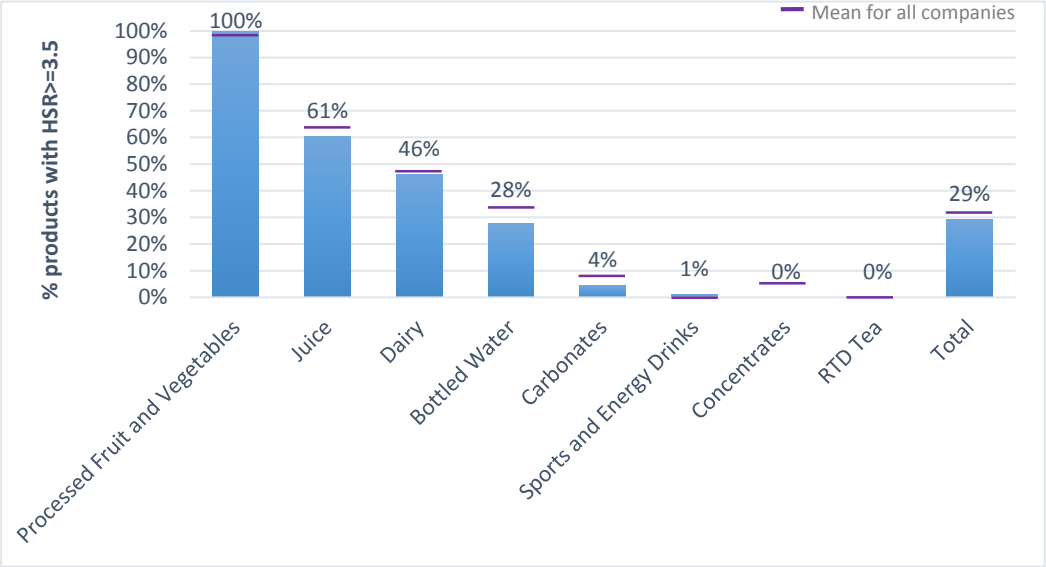


Figure 4.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Coca-Cola products*



Overall, Coca-Cola had a relatively low proportion of sales in all nine countries with an HSR of 3.5 or greater (29%), which more than halved to 13% when results were weighted by sales (Figure 4.3) again illustrating that products of lower nutritional quality account contributed more to annual 2016 sales than products of higher nutritional quality. Coca-Cola Mexico had both the highest mean HSR of all countries as well as the highest proportion of products receiving an HSR of 3.5 or more (55%). However, when results were weighted by sales, results changed dramatically, with all countries except India showing a large decrease in the proportion of healthy products being sold. China had the highest proportion of sales deriving from healthy products when results were weighted by sales (31%). 100% of products in the 'Processed Fruit and Vegetables' category achieved an HSR of >=3.5 (Figure 4.4), however these products did not contribute greatly to overall sales as the country they were sold in (Australia) did not rank in the top three countries.

ANALYSIS 5 and 6: *Country and company rankings based upon proportion of Coca-Cola products meeting WHO Euro criteria*

Figure 4.5 *Proportions of Coca-Cola products meeting WHO Euro criteria for marketing to children – by Country*

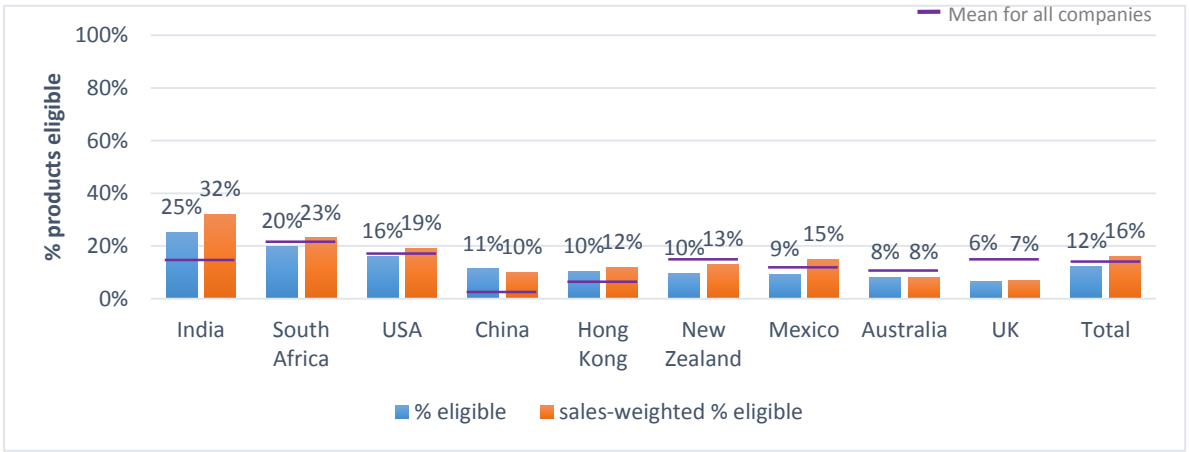
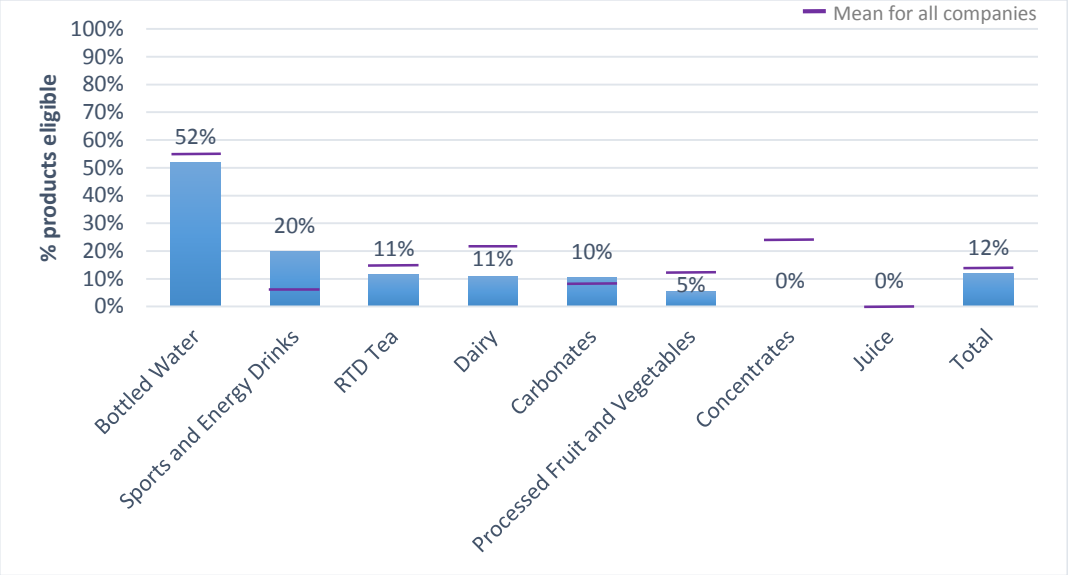


Figure 4.6 *Proportions of Coca-Cola products meeting WHO Euro criteria for marketing to children – by Category*



Overall a very low proportion of Coca-Cola products (12%) were eligible for marketing to children (Figure 4.5), increasing slightly to 16% when results were weighted by sales. India had the highest proportion of products eligible for marketing to children (25%) followed by South Africa with 20%, with the UK and Australia having the lowest proportion (6% and 8% respectively). The country rankings did not change greatly when sales-weighting was brought into the analysis. Interestingly, results by category differed greatly in terms of the proportion of products eligible to be marketed to children versus the proportion of products considered "healthy" using the HSR. Using the HSR, the 'Juice' category fared well, with 61% of products considered 'healthy' under this scheme. However, under the WHO Euro criteria, no fruit juice products are eligible for marketing to children. The 'Bottled Water' category had the highest proportion of products eligible for marketing to children for Coca-Cola products.

More specific results broken down by company and country for Coca-Cola can be seen in Appendix B.

COMPANY 5: CONAGRA

Products included

There were 1,254 identified products manufactured by ConAgra in five countries. There was sufficient nutrient information for 1,036 products to generate a Health Star Rating and for 1,151 to generate results for the WHO Euro analysis. There were 103 products (8%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 5.1 shows the breakdown of products in each category by country.

Table 5.1 *Number of ConAgra products by country in Euromonitor categories*

	Breakfast Cereal	Dairy	Edible Oils	Processed Fruit and Veg	Processed Meat and Seafood	Ready Meals	Sauces, Dressings and Condiments	Savoury Snacks	Spreads	**Total**	**% sales***
India	-	-	8	-	-	-	-	19	4	**31**	**100%**
Mexico	7	-	5	-	-	-	13	18	-	**43**	**100%**
New Zealand	-	-	-	-	-	-	-	6	-	**6**	**100%**
South Africa	-	-	-	-	-	-	-	8	-	**8**	**100%**
USA	-	35	-	223	84	556	-	268	-	**1,166**	**82%**
Total	**7**	**35**	**13**	**223**	**84**	**556**	**13**	**319**	**4**	**1,254**	**83%**

* Note that this value indicates % sales from included categories for each country

The five countries used in this analysis represented 94% of ConAgra's total global food and beverage sales in 2016. Of these five countries, the US represents the highest revenue (more than $6 billion) and South Africa the lowest revenue (less than $4 million). Within each country, the included categories represented between 82% and 100% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the nine product categories included in analysis, 'Ready Meals' represented the largest number of products and the highest sales value.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of ConAgra products and sales-weighted mean nutrient profile of ConAgra products*

Figure 5.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for ConAgra products*

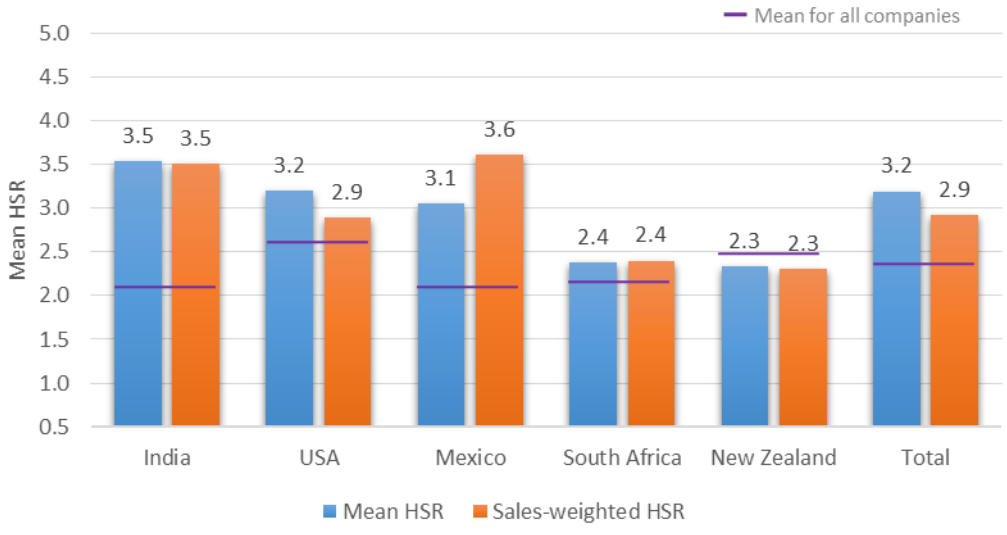
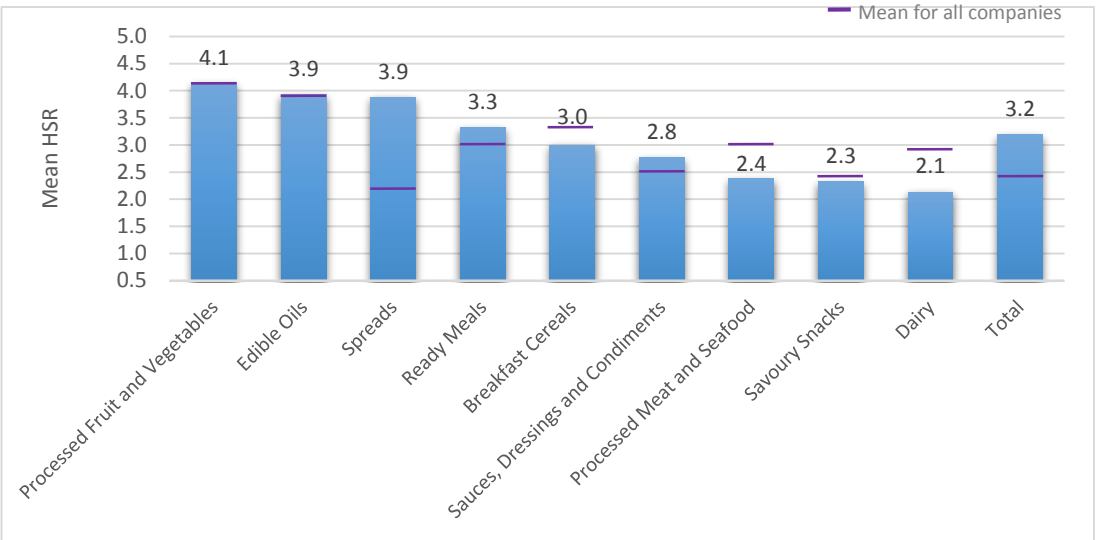


Figure 5.2 *Mean Health Star Rating by category for ConAgra products*



ConAgra had a relatively high overall mean HSR of 3.2, which decreased slightly to 2.9 when results were weighted by sales (Figure 5.1) illustrating that its products with slightly lower HSRs account for a relatively larger proportion of sales than those with higher HSRs. Out of the five countries included in ConAgra's analysis, India had the highest mean HSR before results were weighted by sales (3.5), but was overtaken slightly by Mexico once results were weighted by sales (3.6). New Zealand had the lowest mean HSR both before and after sales-weighting of results (2.3). When ConAgra's results were examined by category (Figure 5.2), the highest mean HSR was seen in the 'Processed Fruit and Vegetables' category (4.1), followed by 'Edible Oils' (3.9) and 'Spreads', with 'Dairy' having the lowest mean HSR of all ConAgra product categories (2.1). The reason for the 'Dairy' category scoring so low related to the types of products sold by ConAgra, with the majority of 'Dairy' products being margarines and whipped cream products. Note that all analyses were done using data per 100g/mL, which is an important consideration for ConAgra as margarine products for example are consumed in small amounts relative to foods in other categories and so likely contribute less to daily nutrient intake compared to other food categories, despite their low HSR results. An important consideration when examining ConAgra's results is that the highest ranked category, 'Processed Fruit and Vegetables', represented a much lower proportion of sales across the five countries, around half the sales that the lower-ranked 'Savoury Snacks' category represented.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of ConAgra products considered "healthy" and sales-weighted proportion of ConAgra products considered "healthy"*

Figure 5.3 *Proportion of products considered "healthy" using the Health Star Rating by country for ConAgra products*

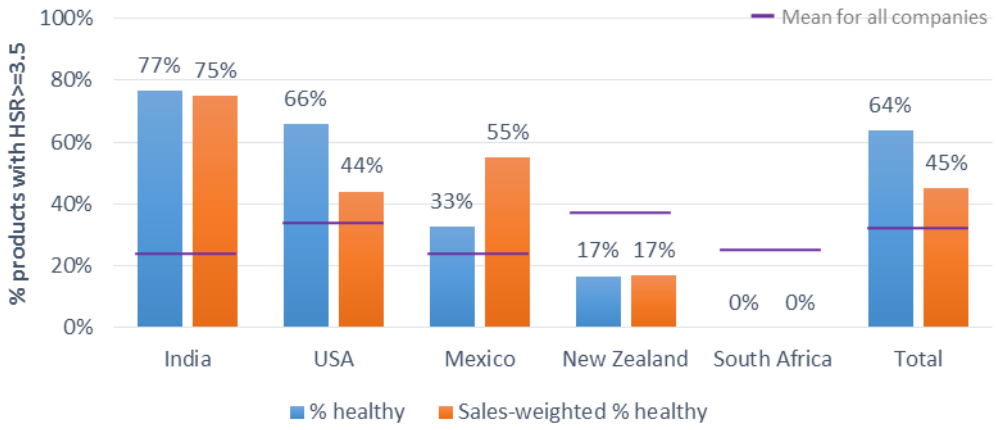
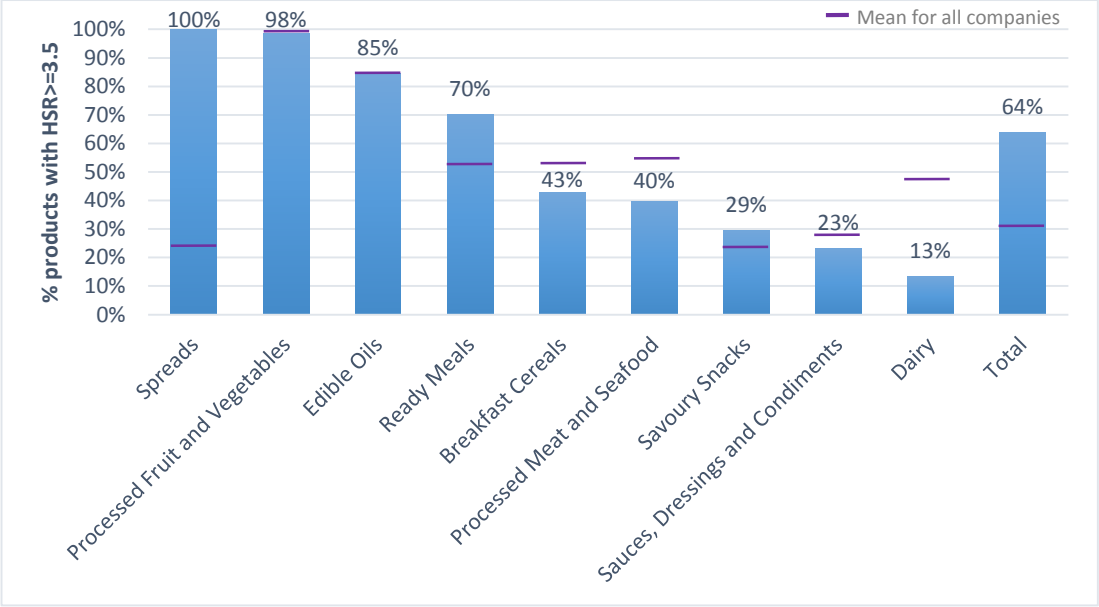


Figure 5.4 *Proportion of products considered "healthy" using the Health Star Rating by category for ConAgra products*



Overall, ConAgra had a high proportion of sales across all five countries with an HSR of 3.5 or greater (64%), however this decreased to 45% when results were weighted by sales (Figure 4.3) illustrating that products of lower nutritional quality account contributed more to annual 2016 sales than products of higher nutritional quality. ConAgra India had both the highest mean HSR of all countries as well as the highest proportion of products receiving an HSR of 3.5 or more (77%). Mexico and the US showed dramatically different results before and after sales-weighting of results, with the USA showing a decrease in the proportion of healthy products when sales-weighting was applied and Mexico showing an increase (Figure 5.3). No products in South Africa received an HSR of 3.5 or above. The same categories that received the highest overall mean HSR also had the highest proportion of products receiving >=3.5 HSR (Figure 5.4).

ANALYSIS 5 and 6: *Country and company rankings based upon proportion of ConAgra products meeting WHO Euro criteria*

Figure 5.5 *Proportions of ConAgra products meeting WHO Euro criteria for marketing to children – by Country*

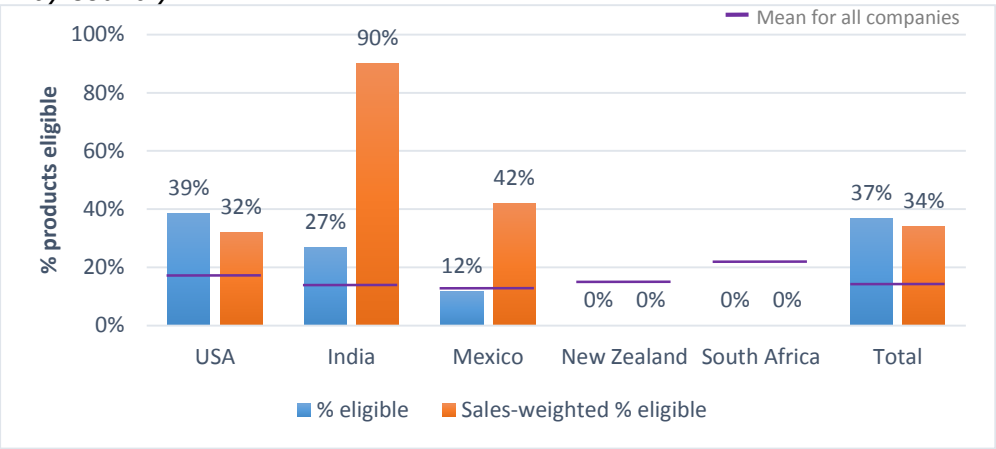
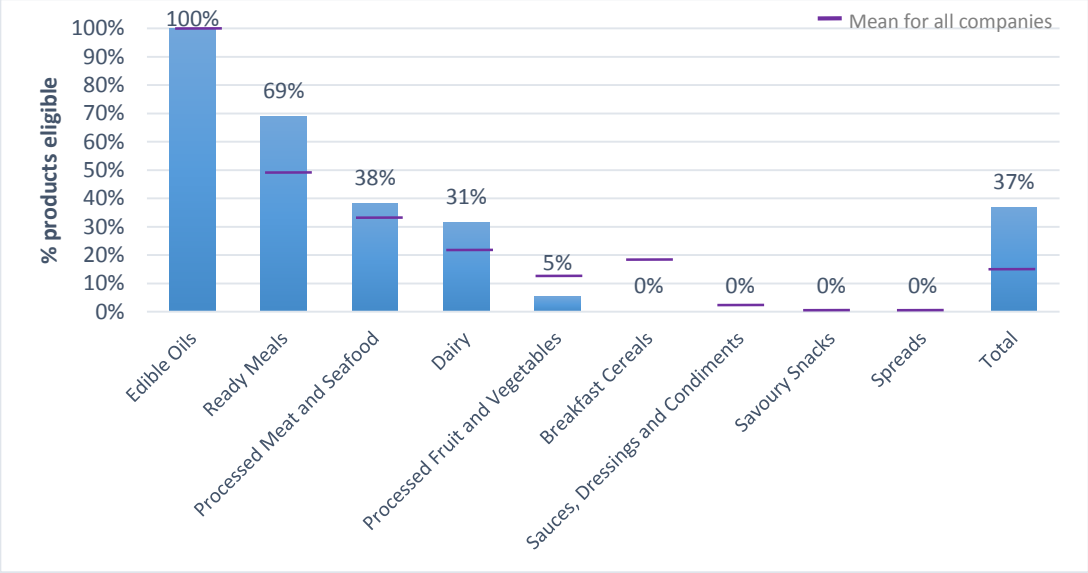


Figure 5.6 *Proportions of ConAgra products meeting WHO Euro criteria for marketing to children – by Category*



Overall just over a third of ConAgra products (37%) were eligible for marketing to children using the WHO Euro criteria (Figure 5.5), decreasing slightly to 34% when results were weighted by sales. The US had the highest proportion of products eligible for marketing to children (39%) before sales-weighting was undertaken, with India ranking first once sales-weighting was applied. However, despite India's dramatic increase in proportion of products eligible for marketing from 27% to 90%, the majority of product sales globally derived from the US and so the overall change in the proportion of products eligible for marketing did not change dramatically. 100% of ConAgra products in the 'Edible Oils' category were eligible for marketing to children, followed by 69% of 'Ready Meals' and '38% of 'Processed Meat and Seafood', with no 'Breakfast Cereals', 'Savoury Snacks' or 'Spreads' being eligible. This result differs from the HSR results which resulted in 100% of 'Spreads' receiving an HSR of 3.5 or above, yet being ineligible for marketing to children using the WHO Euro criteria.

More specific results broken down by company and country for ConAgra can be seen in Appendix B.

COMPANY 6: DANONE

Products included

There were 789 identified products manufactured by Danone in seven of the nine countries. There was sufficient nutrient information for 759 products to generate a Health Star Rating and for 773 to generate results for the WHO Euro analysis. There were 16 products (2%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 6.1 shows the breakdown of products in each category by country.

Table 6.1 *Number of Danone products by country in Euromonitor categories*

	Bottled Water	Dairy	Ice Cream and Frozen Desserts	Juice	**Total**	**% sales***
Australia	2	45	-	-	**47**	**100%**
China	14	13	-	-	**27**	**100%**
Hong Kong	3	-	-	-	**3**	**100%**
Mexico	21	92	-	-	**113**	**98%**
South Africa	1	64	-	-	**65**	**100%**
UK	33	73	-	7	**113**	**100%**
USA	25	381	15	-	**421**	**100%**
Total	**99**	**668**	**15**	**7**	**789**	**99.7%**

* Note that this value indicates % sales from included categories for each country

The seven countries used in this analysis represented 28% of Danone's total global food and beverage sales in 2016. Only four out of Danone's top 10 markets worldwide were included in the current analysis, which is the reason behind the low representation of global food and beverage sales. Of these seven countries, the USA represented the highest revenue (>$3 billion) and Australia the lowest revenue with less than $50 million. Within each country, the included categories represented between 98-100% of sales, however it is unknown whether we have captured every product for sale in every country. The 'Bottled Water' and 'Dairy' categories represented the vast majority of sales within this analysis, with >$2 billion each. The other categories represent sales below $20 million each.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Danone products and sales-weighted mean nutrient profile of Danone products*

Figure 6.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Danone products*

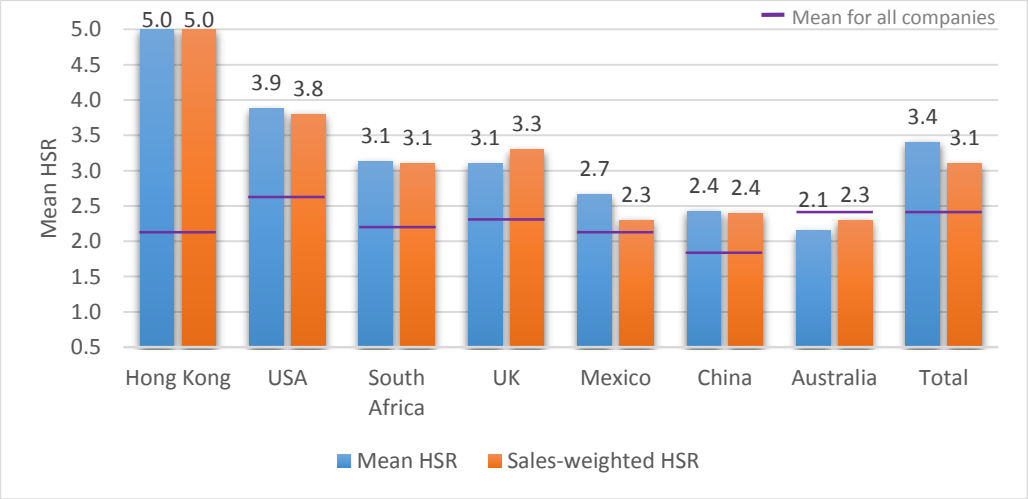
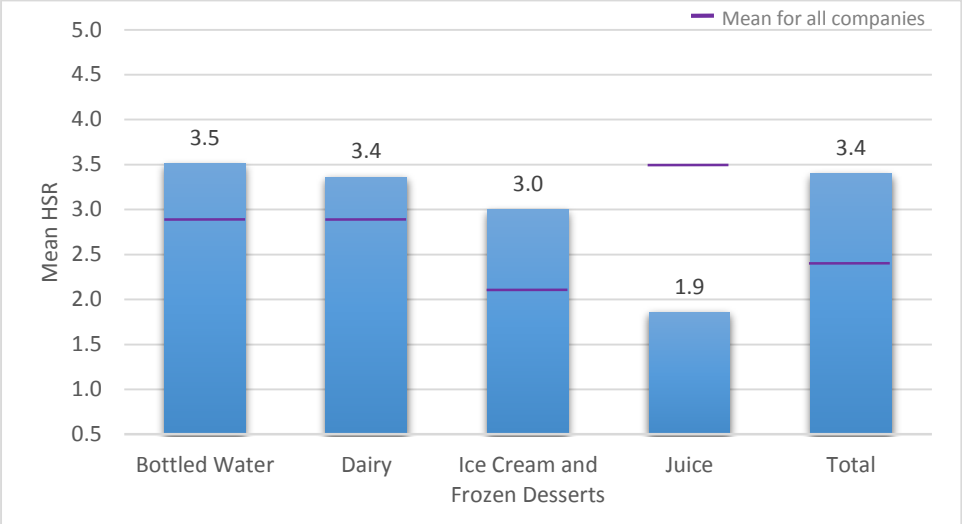


Figure 6.2 *Mean Health Star Rating by category for Danone products*



Danone had a relatively high overall mean HSR of 3.4 which decreased slightly to 3.1 when results were weighted by sales (Figure 6.1). Out of the seven countries included in Danone's analysis, Hong Kong had the highest mean HSR both before and after results were weighted by sales (5.0), followed by the USA with an HSR of 3.9, with Australia having the lowest HSR of 2.1. Hong Kong's high HSR result is due to the fact that the products evaluated were three plain bottled water products which automatically receive an HSR of 5.0. In fact, Danone's relatively high overall result is likely due to each of the seven countries selling bottled water products. Danone 'Dairy' products also received a high overall mean HSR of 3.4 (Figure 6.2), with the 'Juice' category having the lowest mean HSR of 1.9 out of 5.0. Importantly, the higher-ranked 'Bottled Water' and 'Dairy' categories were also the categories with the highest sales for Danone across the six countries representing >$8 billion, vs <$20 million for 'Ice Cream and Frozen Desserts.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Danone products considered "healthy" and sales-weighted proportion of Danone products considered "healthy"*

Figure 6.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Danone products*

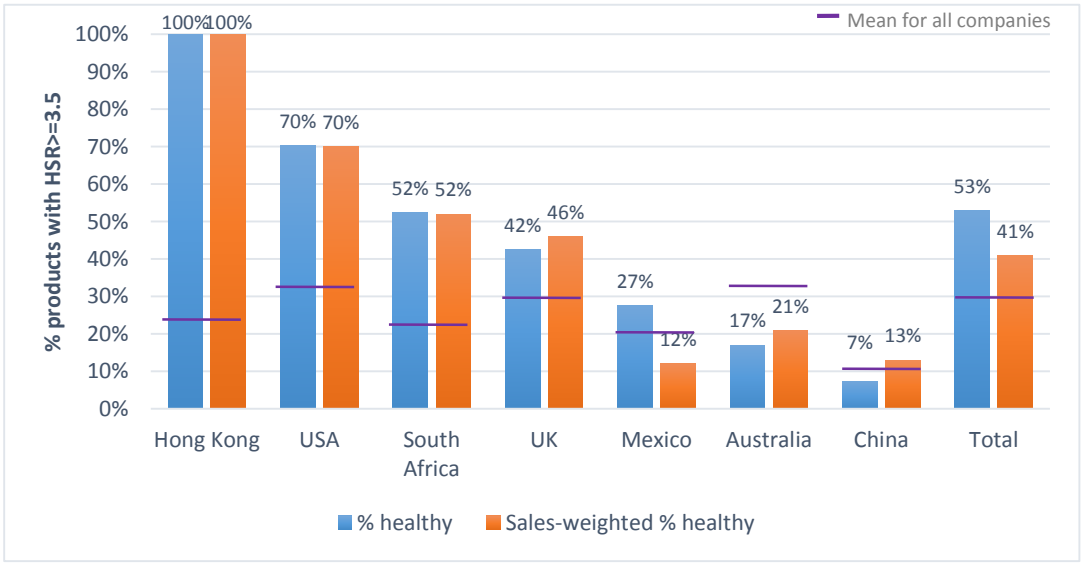
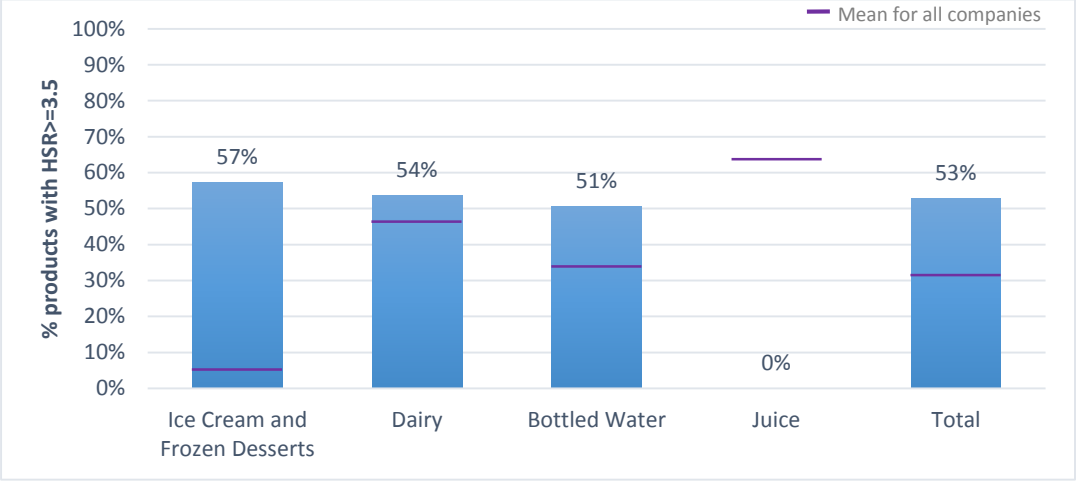


Figure 6.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Danone products*



Overall Danone had just over half of their products receiving an HSR of 3.5 or greater (53%), which decreased to 41% when results were weighted by sales (Figure 6.3) illustrating that products of lower nutritional quality contributed more to annual 2016 sales than products of higher nutritional quality overall. Once again, driven by sales of plain bottled water products, Hong Kong had 100% of products receiving an HSR of 3.5 or more, with the USA and South Africa also having more than 50% of products considered 'healthy'. China had the lowest proportion of healthy products, overtaken slightly by Mexico when sales-weighting was taken into account. No products in the 'Juice' category received >=3.5 HSR.

ANALYSIS 5 and 6: *Country and company rankings based upon proportion of Danone products meeting WHO Euro criteria*

Figure 6.5 *Proportions of Danone products meeting WHO Euro criteria for marketing to children – by Country*

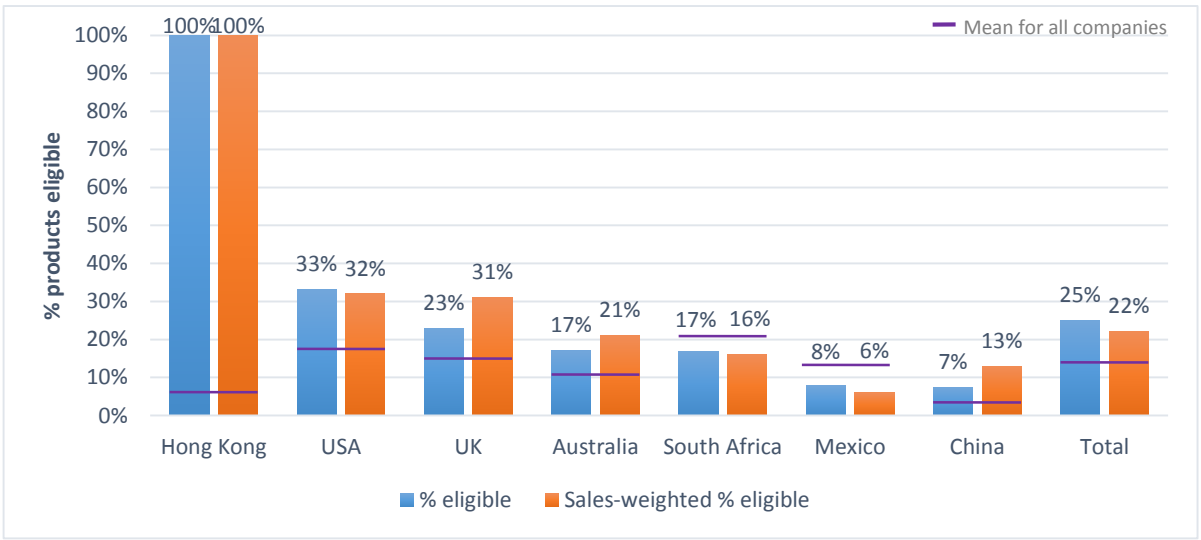
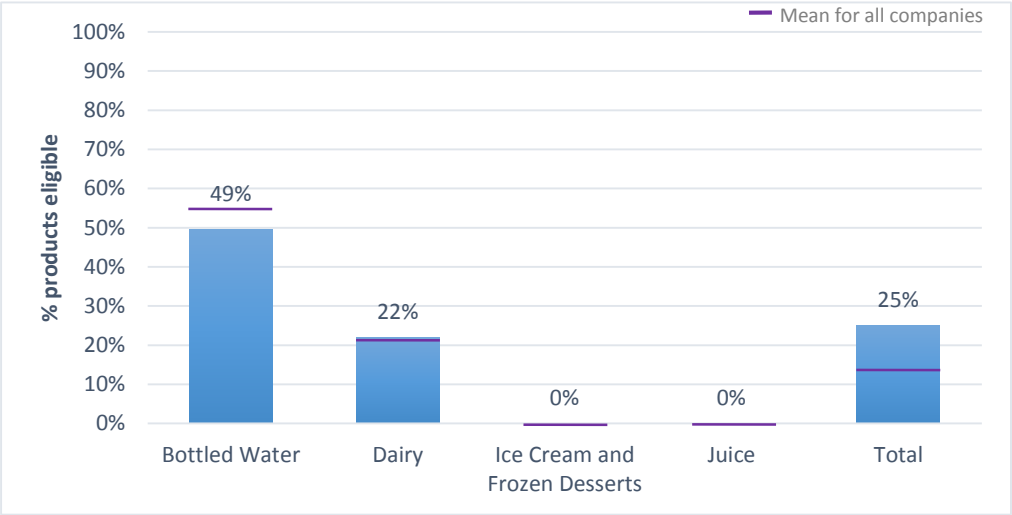


Figure 6.6 *Proportions of Danone products meeting WHO Euro criteria for marketing to children – by Category*



Overall only a quarter of Danone products (25%) were eligible for marketing to children (Figure 6.5), decreasing slightly to 22% when results were weighted by sales. Hong Kong once again with its product list comprising solely of plain bottled water products ranked first out of the seven countries, with 100% of their portfolio eligible for marketing to children. For all other countries, less than a third of products were eligible for marketing to children, with Mexico and China having the lowest proportion eligible.

Under the WHO Euro criteria, no products in the 'Juice' or 'Ice Cream and Frozen Dessert' categories are eligible for marketing, and for Danone less than half (49%) of Bottled Water products were eligible and only 22% of 'Dairy' products (Figure 6.6).

More specific results broken down by company and country for Danone can be seen in Appendix B.

COMPANY 7: FERRERO

Products included

There were 314 identified products manufactured by Ferrero in nine countries. There was sufficient nutrient information for 272 products to generate a Health Star Rating and for 282 to generate results for the WHO Euro analysis. There were 32 products (10%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 7.1 shows the breakdown of products in each category by country.

Table 7.1 *Number of Ferrero products by country in Euromonitor categories*

	Baked Goods	Confectionery	Spreads	**Total**	**% sales***
Australia	-	17	1	**18**	**100%**
China	-	8	-	**8**	**100%**
Hong Kong	-	21	1	**22**	**100%**
India	-	15	1	**16**	**100%**
Mexico	-	8	1	**9**	**100%**
New Zealand	-	3	1	**4**	**100%**
South Africa	-	11	1	**12**	**100%**
UK	30	152	1	**183**	**100%**
USA	-	41	1	**42**	**100%**
Total	**30**	**276**	**8**	**314**	**100%**

* Note that this value indicates % sales from included categories for each country

The nine countries used in this analysis represented 22% of Ferrero's total global food and beverage sales in 2016. Of these nine countries, the USA represented the highest revenue (>$900 million) and South Africa the lowest revenue with <$15 million. Within each country, the included categories represented 100% of product sales, however it is unknown whether we have captured every product for sale in every country. Confectionery represented by far the largest number of products and the highest sales value.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Ferrero products and sales-weighted mean nutrient profile of Ferrero products*

Figure 7.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Ferrero products*

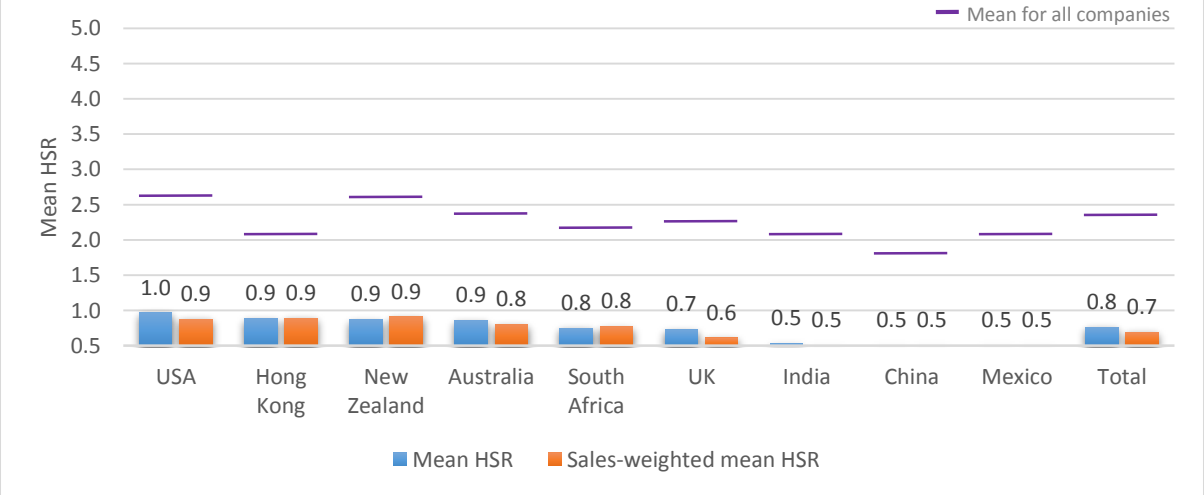
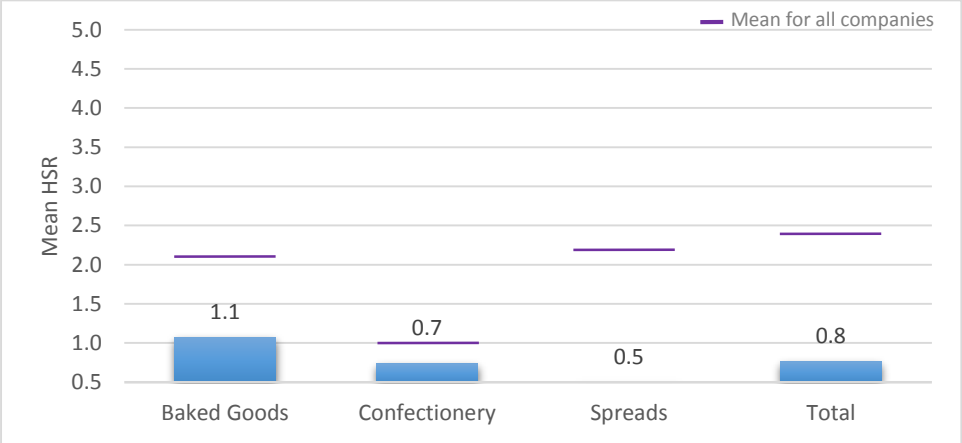


Figure 7.2 *Mean Health Star Rating by category for Ferrero products*



Ferrero had a very low overall mean HSR of 0.8 which decreased slightly to 0.7 when results were weighted by sales (Figure 7.1). There was not a great difference in mean overall HSR between the nine countries included in Ferrero's analysis, mainly due to the fact that a very similar product mix was available in each country. For example, *Nutella Hazelnut Spread* was sold in most countries, as were confectionery items. The UK was the only country in which 'Baked Goods' were sold. 'Baked Goods' in fact had the highest mean HSR of all the categories, however it was still low at 1.1 out of 5.0. *Nutella Hazelnut Spread* received an HSR of only 0.5 in all countries.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Ferrero products considered "healthy" and sales-weighted proportion of Ferrero products considered "healthy"*

Zero Ferrero products across all nine countries received an HSR of >=3.5.

ANALYSIS 5 and 6: *Country and company rankings based upon proportion of Ferrero products meeting WHO Euro criteria*

Zero Ferrero products across all nine countries were eligible for marketing to children under the WHO Euro criteria.

More specific results broken down by company and country for Ferrero can be seen in Appendix B.

COMPANY 8: GENERAL MILLS

Products included

There were 1,650 identified products manufactured by General Mills in nine countries. There was sufficient nutrient information for 1,543 products to generate a Health Star Rating and for 1,414 to generate results for the WHO Euro analysis. There were 102 products (6%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 8.1 shows the breakdown of products in each category by country.

Table 8.1 *Number of General Mills products by country in Euromonitor categories*

	Baked Goods	Breakfast Cereals	Dairy	Ice Cream and Frozen Desserts	Processed Meat and Seafood	Ready Meals	Rice, Pasta and Noodles	Sauces, Dressings and Condiments	Sweet Biscuits, Snack Bars and Fruit Snacks	**Total**	**% sales***
Australia	41	-	-	-	-	9	20	17	6	**93**	**56%**
China	-	-	-	73	-	-	-	-	-	**73**	**64%**
Hong Kong	-	-	-	44	7	-	-	-	8	**59**	**71%**
India	22	-	-	-	-	-	-	-	-	**22**	**100%**
Mexico	29	-	33	9	-	-	-	-	17	**88**	**100%**
NZ	27	-	-	-	-	9	-	10	6	**52**	**29%**
South Africa	-	-	-	-	-	4	-	-	8	**12**	**100%**
UK	72	-	84	15	-	21	-	-	15	**207**	**98%**
USA	250	138	205	-	-	137	-	-	314	**1,044**	**77%**
Total	**441**	**138**	**322**	**141**	**7**	**180**	**20**	**27**	**374**	**1,650**	**77%**

* Note that this value indicates % sales from included categories for each country

The nine countries used in this analysis represented 73% of General Mills' total global food and beverage sales in 2016. Of these nine countries, the USA by far represented the highest revenue (>$8 billion) and India the lowest revenue with <$3 million. Within each country, the included categories represented between 29% and 100% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the nine product categories that are covered in this analysis, 'Breakfast Cereals' represented the highest sales value, and 'Baked Goods' the largest number of products.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of General Mills products and sales-weighted mean nutrient profile of General Mills products*

Figure 8.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for General Mills products*

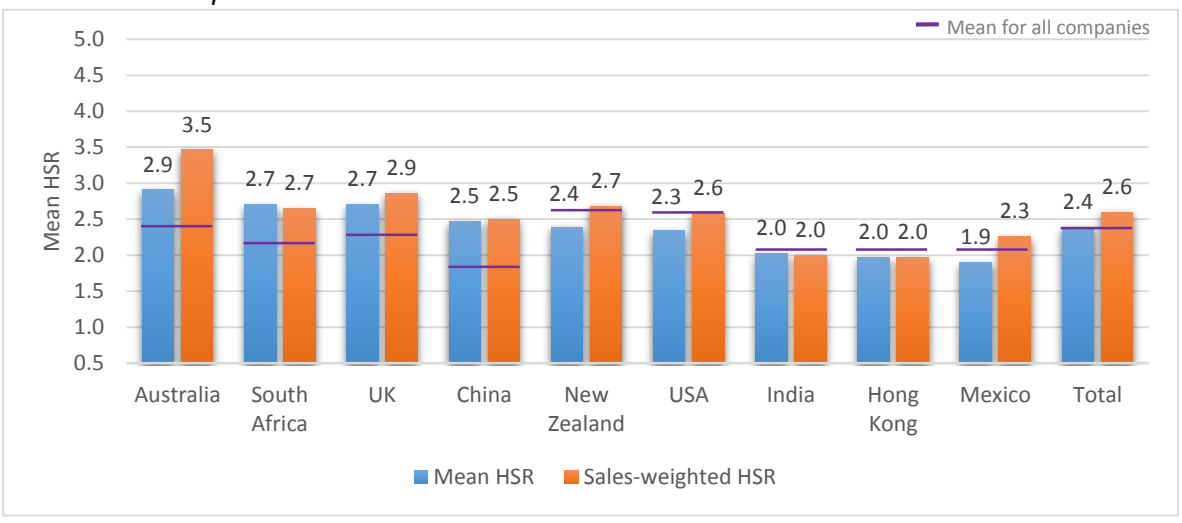
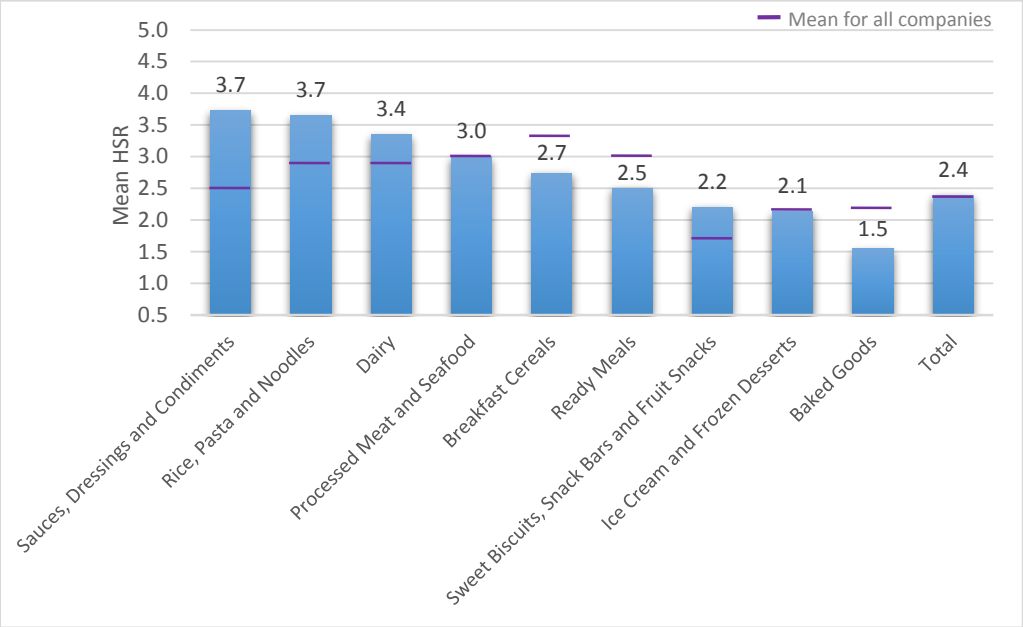


Figure 8.2 *Mean Health Star Rating by category for General Mills products*



General Mills had an overall mean HSR of 2.4 which increased slightly to 2.6 when results were weighted by sales (Figure 8.1) illustrating that its products with slightly higher HSRs accounted for a slightly larger proportion of sales than those with lower HSRs. Out of the nine countries included in General Mills' analysis, Australia had the highest mean HSR both before and after results were weighted by sales (2.9 and 3.5 respectively), followed by South Africa and the UK with 2.7. India, Hong Kong and Mexico had the lowest mean HSRs overall, however Mexico's mean HSR improved when sales-weighting was applied (Figure 8.1). When General Mills' results were examined by category (Figure 8.2), the highest mean HSR was seen in the 'Sauces, Dressings and Condiments' category (3.7), followed by 'Rice, Pasta and Noodles' (3.7), with 'Baked Goods' having the lowest mean HSR of all General Mills product categories (1.5) driven by the presence of a large number of cake mixes in this product category. Important to note when interpreting General Mills' analysis is that the two highest ranked categories represented the lowest dollar amount in sales across the nine countries. 'Breakfast Cereals' in the US alone represented >$2 billion compared with <$2 million for 'Sauces, Dressings and Condiments' and 'Rice, Pasta and Noodles' combined.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of General Mills products considered "healthy" and sales-weighted proportion of General Mills products considered "healthy"*

Figure 8.3 *Proportion of products considered "healthy" using the Health Star Rating by country for General Mills products*

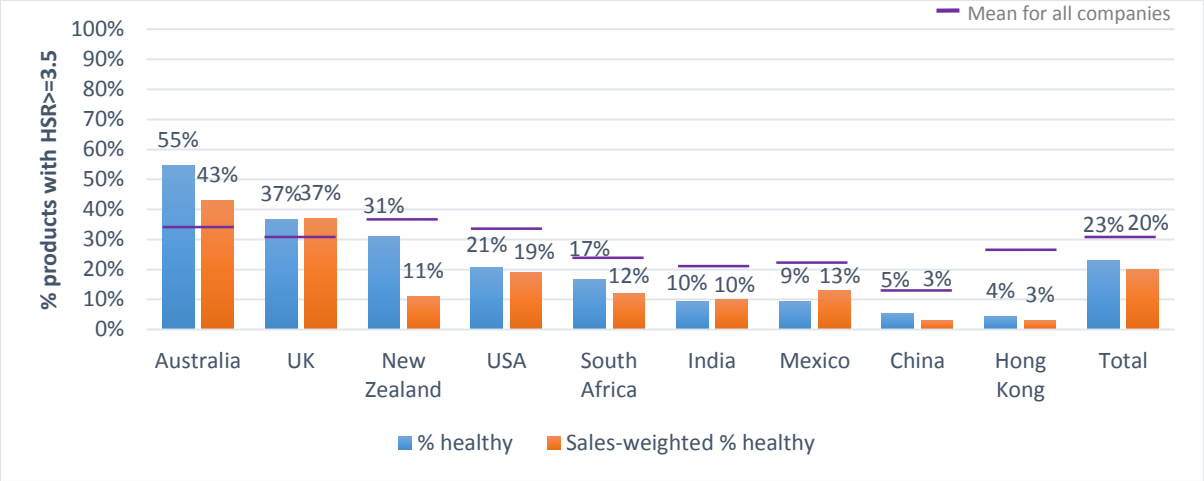
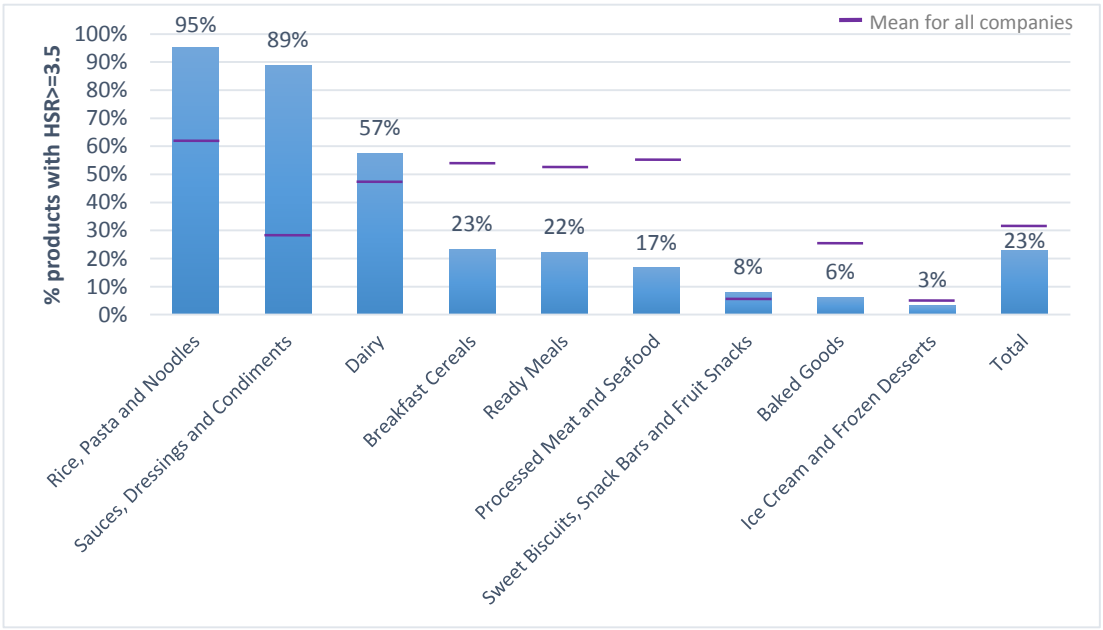


Figure 8.4 *Proportion of products considered "healthy" using the Health Star Rating by category for General Mills products*



Overall, General Mills had a relatively low proportion of sales across all nine countries with an HSR of 3.5 or more (23%), which decreased slightly to 20% when results were weighted by sales (Figure 8.3) again illustrating that products of lower nutritional quality contributed slightly more to annual 2016 sales than products of higher nutritional quality. Australia had both the highest mean HSR of all countries as well as the highest proportion of products receiving an HSR of 3.5 or more (55%) and remained ranked first after results were weighted by sales. China and Hong Kong had the lowest proportion of products receiving >=3.5 HSR. Australia's high ranking is likely fuelled by the product types available. For example, Figure 8.4 shows that the 'Rice, Pasta and Noodles' and 'Sauces, Dressings and Condiments' categories had the highest proportion of products receiving >=3.5 HSR, with Australia one of the only countries with products in these categories.

ANALYSIS 5 and 6: *Country and company rankings based upon proportion of General Mills products meeting WHO Euro criteria*

Figure 8.5 *Proportions of General Mills products meeting WHO Euro criteria for marketing to children – by Country*

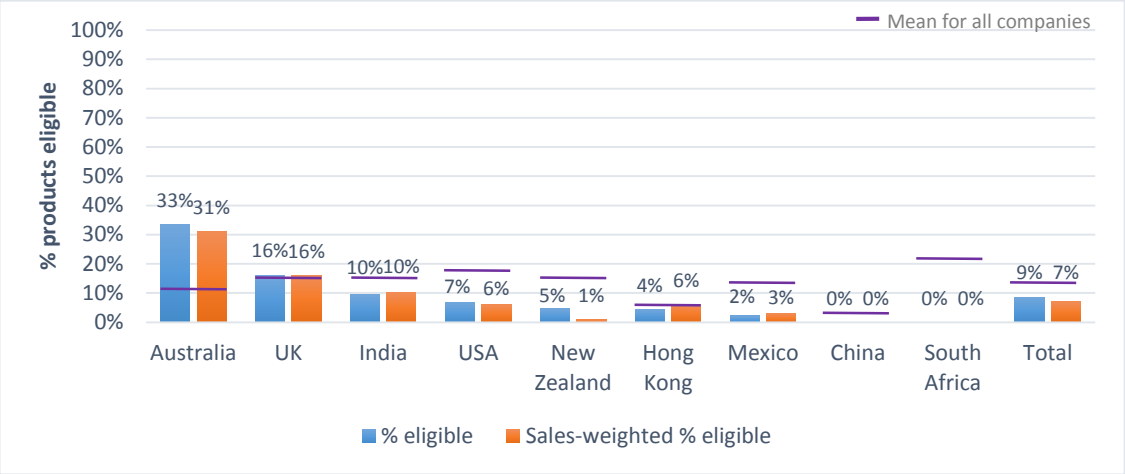
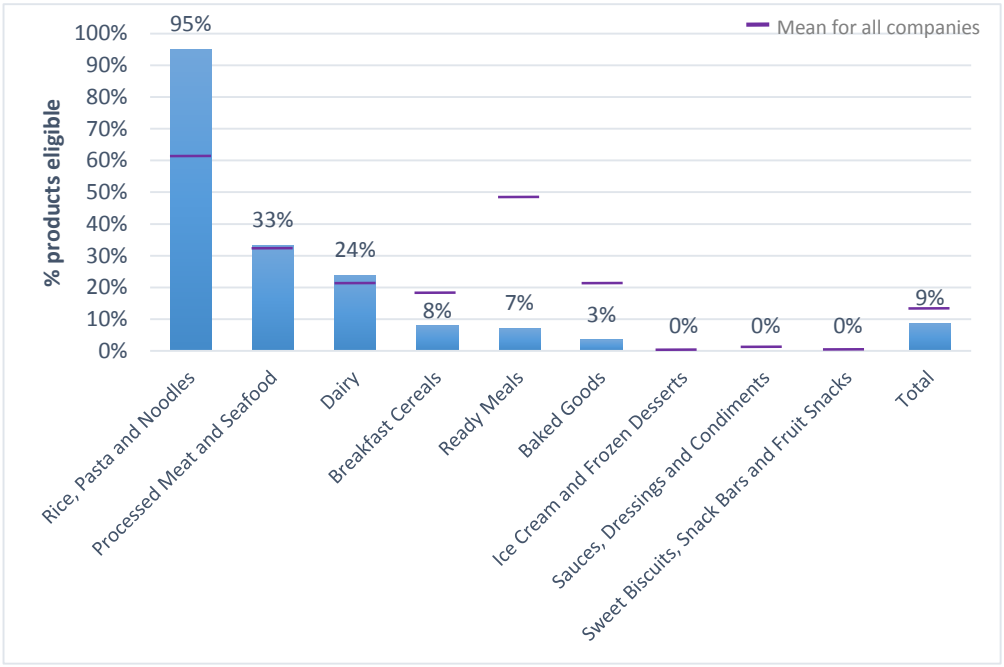


Figure 8.6 *Proportions of General Mills products meeting WHO Euro criteria for marketing to children – by Category*



Overall a very low proportion of General Mills products (9%) were eligible for marketing to children (Figure 8.5), decreasing even more to 7% when results were weighted by sales. Australia and the UK once again had the highest proportion of products eligible for marketing to children (33% and 16% respectively) with China and South Africa both selling zero products that were eligible for marketing to children. Once again, these results were driven by the fact that General Mills sold 'Rice, Pasta and Noodle' products in Australia and not in the remaining countries, with 95% of 'Rice, Pasta and Noodles' eligible for marketing to children.

More specific results broken down by company and country for General Mills can be seen in Appendix B.

COMPANY 9: GRUPO BIMBO

Products included

There were 477 identified products manufactured by Grupo Bimbo in four countries. There was sufficient nutrient information for 477 products to generate a Health Star Rating and for 477 to generate results for the WHO Euro analysis. Table 9.1 shows the breakdown of products in each category by country.

Table 9.1 *Number of Grupo Bimbo products by country in Euromonitor categories*

	Baked Goods	Confectionery	Savoury Snacks	Spreads	Sweet Biscuits, Snack Bars and Fruit Snacks	**Total**	**% sales***
China	20	-	-	-	-	**20**	**100%**
Mexico	53	35	44	5	88	**225**	**100%**
UK	16	-	-	-	-	**16**	**100%**
USA	191	-	25	-	-	**216**	**100%**
Total	**280**	**35**	**69**	**5**	**88**	**477**	**100%**

* Note that this value indicates % sales from included categories for each country

The four countries used in this analysis represented 72% of Grupo Bimbo's total global food and beverage sales in 2016. The USA and Mexico represent Grupo Bimbo's main markets, with >30% each with remaining countries representing <1% each. Within each country, the included categories represented 100% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the five product categories included in analysis, 'Baked Goods' represented the largest number of products and the highest sales value (>$7 billion).

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Grupo Bimbo products and sales-weighted mean nutrient profile of Grupo Bimbo products*

Figure 9.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Grupo Bimbo products*

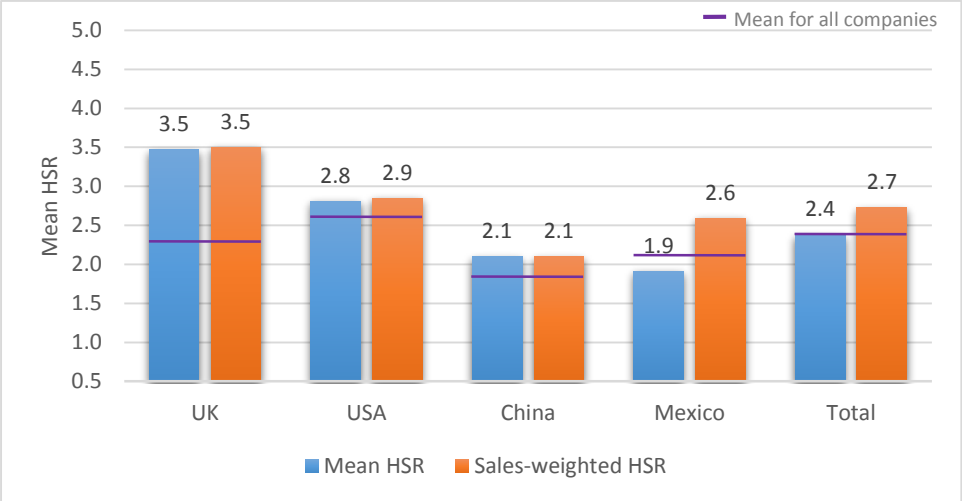
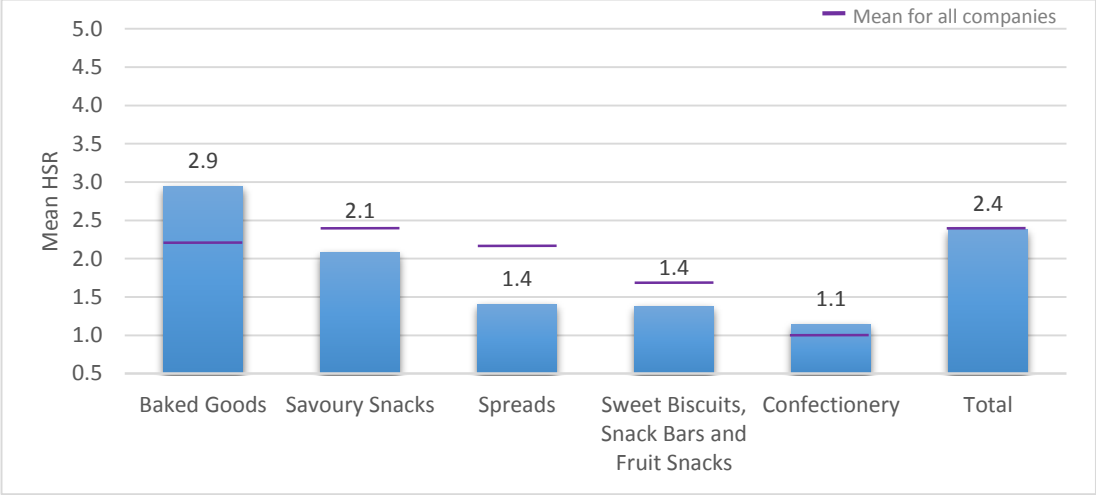


Figure 9.2 *Mean Health Star Rating by category for Grupo Bimbo products*



Grupo Bimbo had an overall mean HSR of 2.4 which increased slightly to 2.7 when results were weighted by sales (Figure 9.1) illustrating that its products with slightly higher HSRs accounted for a relatively larger proportion of sales than those with lower HSRs. Out of the four countries included in Grupo Bimbo's analysis, the UK had the highest mean HSR both before and after results were weighted by sales (3.5), followed by the USA with an HSR of 2.8. Mexico had the lowest mean HSR overall (1.9) however this was not the case once sales-weighting was applied, resulting in China having the lowest HSR of 2.1. 'Baked Goods' were available in every country included in analysis, with this category also having the highest mean HSR of all categories included (2.9 – Figure 9.2). 'Confectionery', not surprisingly, had the lowest mean HSR of all categories examined, perhaps explaining Mexico's relatively low overall mean HSR as Mexico was the only country to have 'Confectionery' items included in analysis. Importantly, the highest-ranked category (Baked Goods) represented more sales than the remaining categories combined, which helps explain Grupo Bimbo's mean overall HSR increasing when results were weighted by sales.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Grupo Bimbo products considered "healthy" and sales-weighted proportion of Grupo Bimbo products considered "healthy"*

Figure 9.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Grupo Bimbo products*

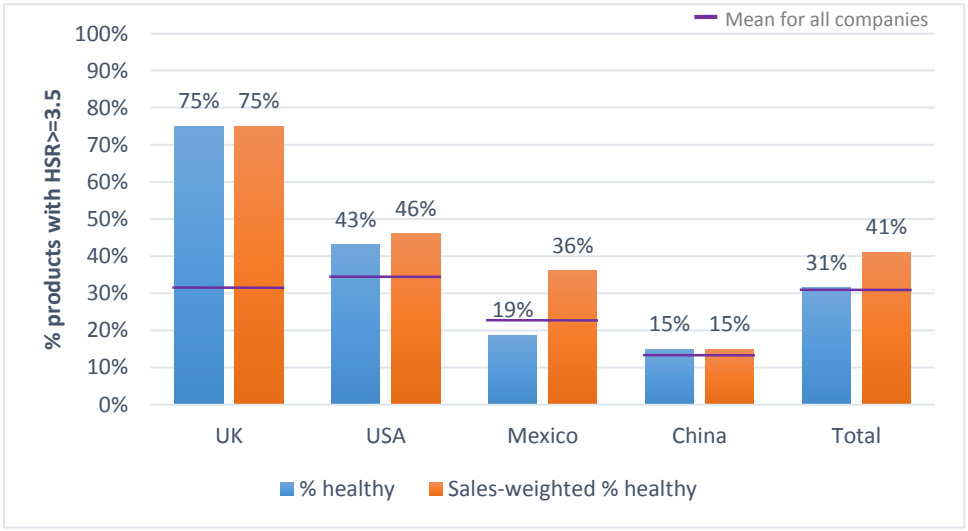
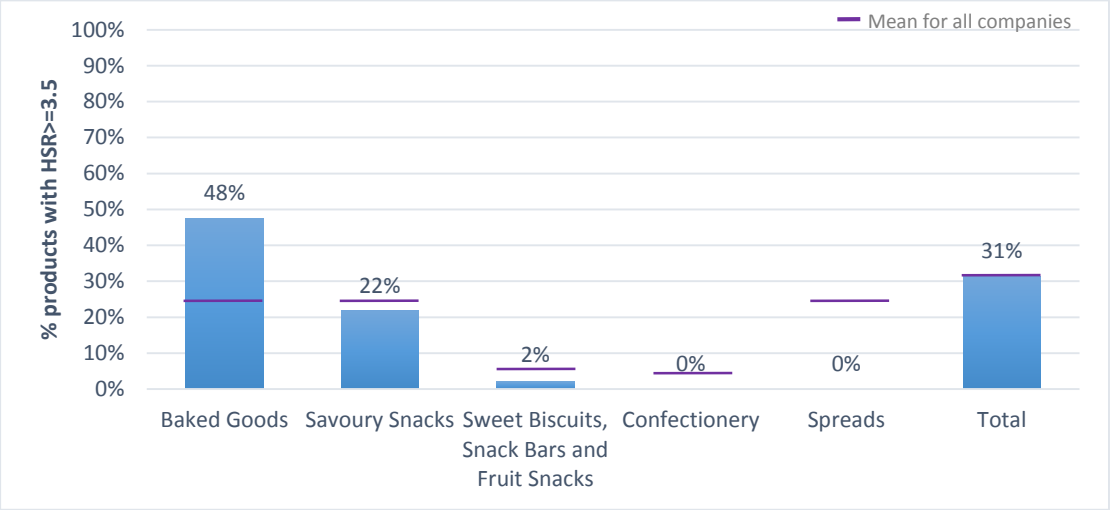


Figure 9.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Grupo Bimbo products*



Overall, Grupo Bimbo had just under a third of products across all four countries with an HSR of 3.5 or greater (31%), which increased to 41% when results were weighted by sales (Figure 9.3) again illustrating that products of higher nutritional quality account contributed more to annual 2016 sales than products of lower nutritional quality. The UK had both the highest mean HSR of all countries as well as the highest proportion of products receiving an HSR of 3.5 or more (75%). China had the lowest proportion of products receiving an HSR of >=3.5 (15%). 'Baked Goods' had the highest proportion of products receiving an HSR of >=3.5, likely driven by Grupo Bimbo's plain bread-based products within this category. Zero 'Confectionery' and 'Spreads' products received an HSR of >=3.5 (Figure 9.4).

ANALYSIS 5 and 6: *Country and company rankings based upon proportion of Grupo Bimbo products meeting WHO Euro criteria*

Figure 9.5 *Proportions of Grupo Bimbo products meeting WHO Euro criteria for marketing to children – by Country*

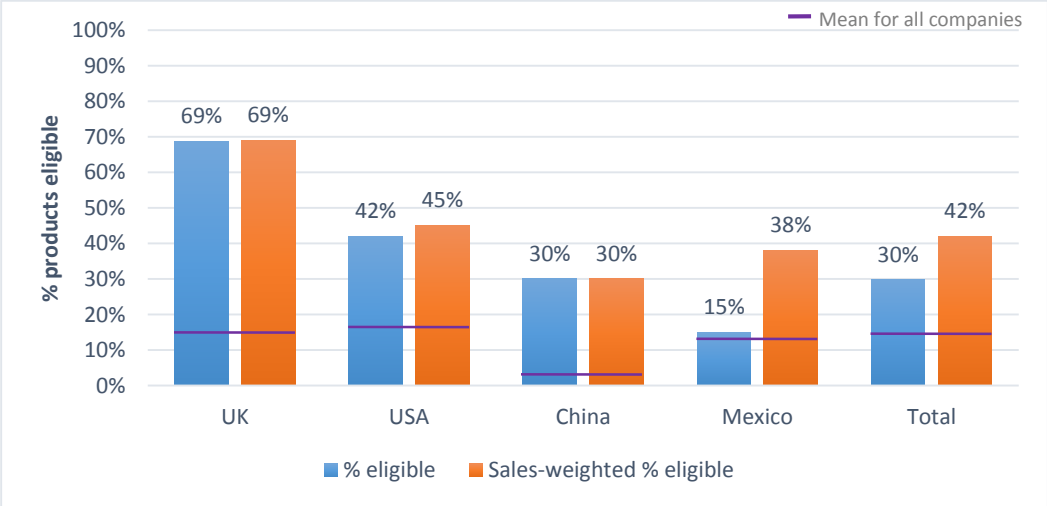
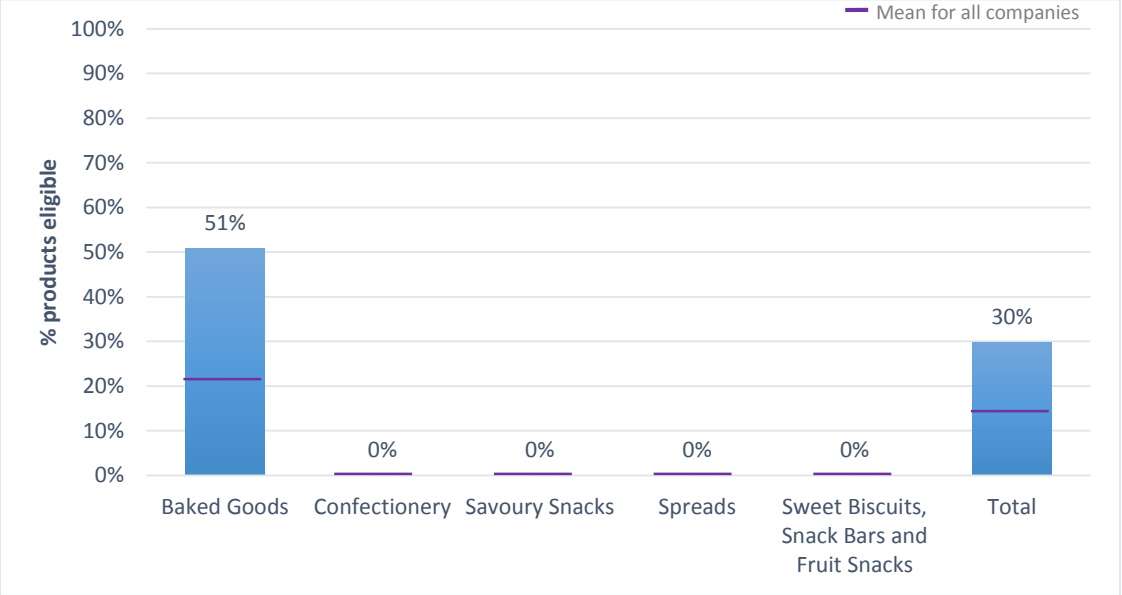


Figure 9.6 *Proportions of Grupo Bimbo products meeting WHO Euro criteria for marketing to children – by Category*



Overall less than a third of Grupo Bimbo products (30%) were eligible for marketing to children under the WHO Euro criteria (Figure 9.5), increasing to 42% when results were weighted by sales. The UK had the highest proportion of products eligible for marketing to children (69%) followed by the USA (42%), with China having the lowest proportion of products eligible for marketing to children when sales-weighting of results was applied (15%). At a category level, 'Baked Goods' was the only category in which Grupo Bimbo products were eligible for marketing to children (Figure 9.6).

More specific results broken down by company and country for Grupo Bimbo can be seen in Appendix B.

COMPANY 10: KELLOGG'S

Products included

There were 1,335 identified products manufactured by Kellogg's in eight countries. There was sufficient nutrient information for 1,309 products to generate a Health Star Rating and for 1,331 to generate results for the WHO Euro analysis. There were 4 products (<1%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 10.1 shows the breakdown of products in each category by country.

Table 10.1 *Number of Kellogg's products by country in Euromonitor categories*

	Baked Goods	Breakfast Cereals	Dairy	Processed Meat and Seafood	Savoury Snacks	Sweet Biscuits, Snack Bars and Fruit Snacks	**Total**	**% sales***
Australia	-	48	-	-	15	45	**108**	**80%**
Hong Kong	-	30	-	-	11	-	**41**	**100%**
India	-	39	-	-	-	-	**39**	**100%**
Mexico	-	29	6	-	13	35	**83**	**100%**
New Zealand	-	47	-	-	15	45	**107**	**100%**
South Africa	-	15	-	-	4	4	**23**	**100%**
UK	-	105	-	-	67	71	**243**	**100%**
USA	100	143	-	40	184	224	**691**	**99%**
Total	**100**	**456**	**6**	**40**	**309**	**424**	**1,335**	**99%**

* Note that this value indicates % sales from included categories for each country

The eight countries used in this analysis represented 72% of Kellogg's total global food and beverage sales in 2016. Of these eight countries, the US represented by far the highest revenue with >$9 billion and Hong Kong the lowest revenue with just over $20 million. Within each country, the included categories represented between 80% and 100% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the six product categories included in analysis, 'Breakfast Cereals' represented the largest number of products and the highest sales value.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Kellogg's products and sales-weighted mean nutrient profile of Kellogg's products*

Figure 10.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Kellogg's products*

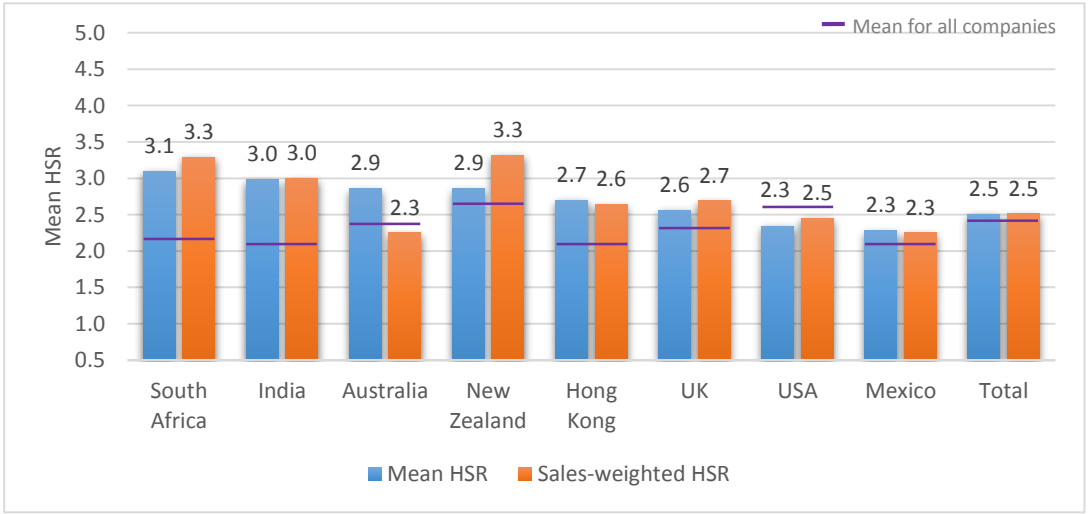
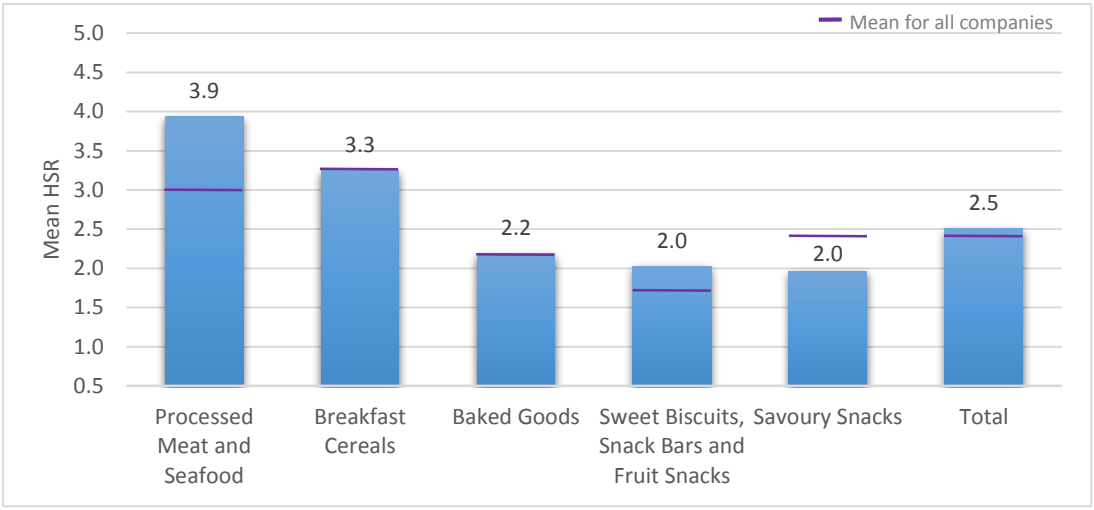


Figure 10.2 *Mean Health Star Rating by category for Kellogg's products*



Kellogg's had an overall mean HSR of 2.5 which remained the same when results were weighted by sales (Figure 10.1). Out of the eight countries included in Kellogg's analysis, South Africa had the highest mean HSR both before and after results were weighted by sales (3.1 and 3.3 respectively). India ranked second before results were weighted by sales, with New Zealand ranking second once sales-weighting was applied. Mexico and the USA had the lowest mean HSR of 2.3, joined by Australia with 2.3 once sales-weighting was applied. When Kellogg's results were examined by category (Figure 10.2), the highest mean HSR was seen in the 'Processed Meat and Seafood' category (3.9), followed by 'Breakfast Cereals' (3.3), with 'Savoury Snacks' having the lowest mean HSR of all Kellogg's product categories (2.0) driven mainly by Kellogg's *Pringles* brand potato crisps. 'Breakfast Cereals' and 'Savoury Snacks' represent Kellogg's largest categories in terms of dollar sales across the eight countries (>$3 billion in each category), with the highest-ranked category (Processed Meat and Seafood) representing the lowest dollar sales (<$300 million). This category consisted of vegetarian meat alternative products under the *Gardenburger* and *Morningstar Farms* brands.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Kellogg's products considered "healthy" and sales-weighted proportion of Kellogg's products considered "healthy"*

Figure 10.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Kellogg's products*

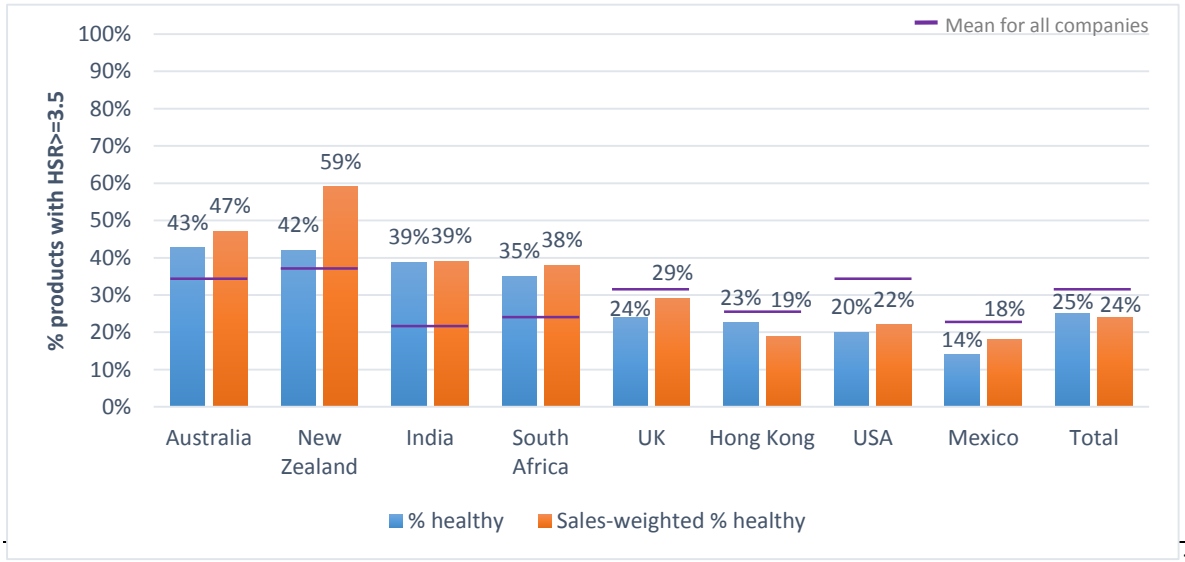
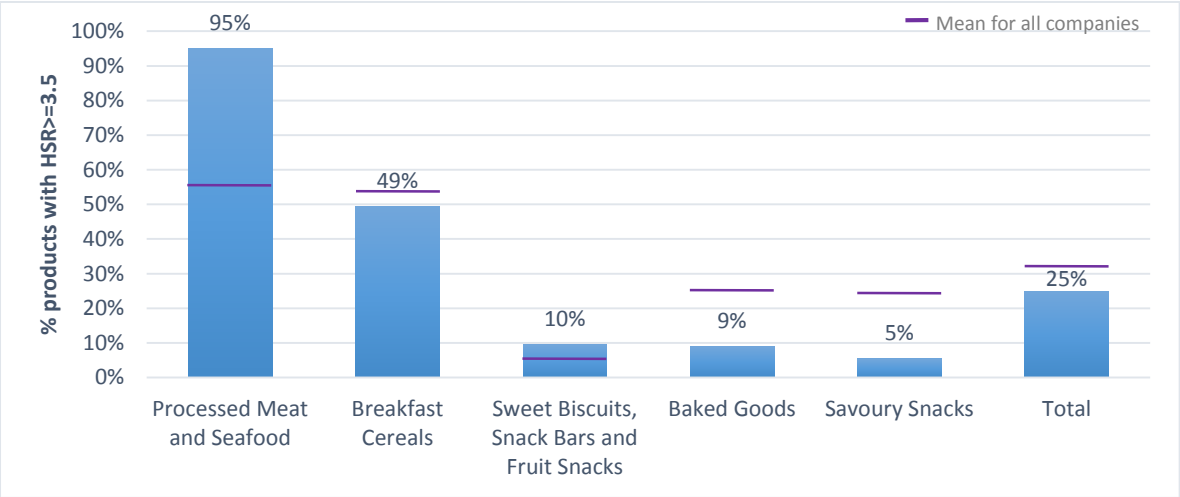


Figure 10.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Kellogg's products*



Overall, Kellogg's had a relatively low proportion of sales in all eight countries with an HSR of 3.5 or greater (25%), which decreased slightly to 24% when results were weighted by sales (Figure 10.3). Kellogg's Australia and New Zealand had the highest proportion of products receiving an HSR of 3.5 or more both before and after sales-weighting of results, with Hong Kong, the USA and Mexico having the lowest proportion. Interestingly, the 'Processed Meat and Seafood' is the category with the highest proportion of products with an HSR>=3.5, but it is the smallest category by sales. The majority of sales in the USA did not derive from this category and were of lower nutritional value. Around half of all breakfast cereal products across all countries would be considered "healthy" using this metric of an HSR>=3.5 (Figure 10.4).

ANALYSIS 5 and 6: *Country and category rankings based upon proportion of Kellogg's products meeting WHO Euro criteria*

Figure 10.5 *Proportions of Kellogg's products meeting WHO Euro criteria for marketing to children – by Country*

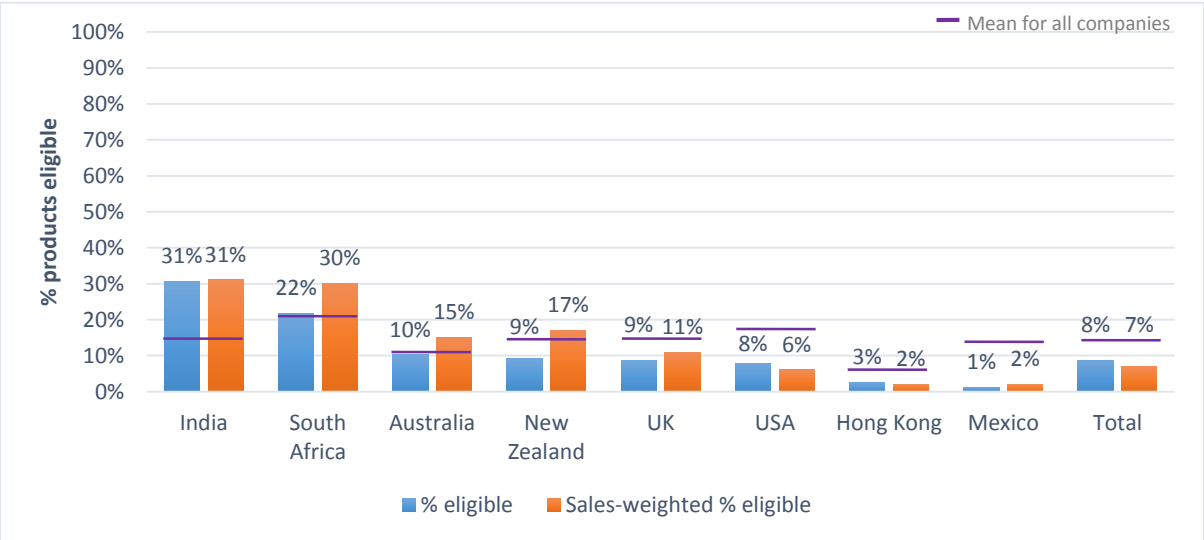
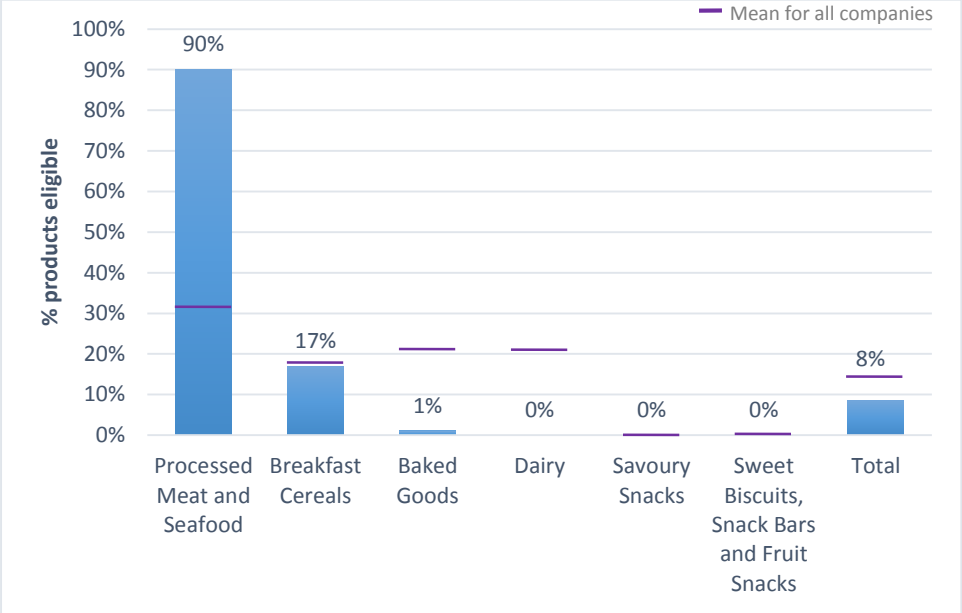


Figure 10.6 *Proportions of Kellogg's products meeting WHO Euro criteria for marketing to children – by Category*



Overall a very low proportion of Kellogg's products (<10%) were eligible for marketing to children under the WHO Euro criteria (Figure 10.5), both before and after results were weighted by sales. India and South Africa had the highest proportion of products eligible for marketing to children (31% and 22% respectively) with Hong Kong and Mexico having <5% of products eligible for marketing to children. The 'Processed Meat and Seafood' and 'Breakfast Cereals' categories were the only categories with >10% products eligible for marketing, with 0% of 'Dairy', 'Savoury Snacks' and 'Sweet Biscuits, Snack Bars and Fruit Snacks' eligible (Figure 10.6).

More specific results broken down by company and country for Kellogg's can be seen in Appendix B.

COMPANY 11: KRAFT HEINZ

Products included

There were 2,624 identified products manufactured by Kraft Heinz in nine countries. There was sufficient nutrient information for 2,077 products to generate a Health Star Rating and for 2,587 to generate results for the WHO Euro analysis. There were 37 products (1%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 11.1 shows the breakdown of products in each category by country.

Table 11.1 *Number of Kraft Heinz products by country in Euromonitor categories*

	Baked Goods	Dairy	Juice	Processed Fruit and Veg	Processed Meat and Seafood	Ready Meals	Sauces, Dressings and Condiments	Savoury Snacks	Soup	Spreads	**Total**	**% sales***
Australia	-	36	86	88	-	-	79	-	-	43	**332**	**78%**
China	-	-	-	-	-	-	21	-	-	-	**21**	**100%**
Hong Kong	-	6	-	5	-	-	23	-	4	3	**41**	**89%**
India	-	-	-	1	-	-	3	-	-	-	**4**	**100%**
Mexico	1	6	-	-	9	3	21	-	-	-	**40**	**97%**
New Zealand	-	-	-	233	-	54	194	-	91	54	**626**	**96%**
South Africa	12	-	-	-	12	1	6	-	6	-	**37**	**97%**
UK	-	-	-	40	-	44	123	-	93	5	**305**	**100%**
USA	-	423	-	-	199	101	354	141	-	-	**1,218**	**84%**
Total	**13**	**471**	**86**	**367**	**220**	**203**	**824**	**141**	**194**	**105**	**2,624**	**85%**

* Note that this value indicates % sales from included categories for each country

The nine countries used in analysis represented 78% of Kraft Heinz total global food and beverage sales in 2016. Of these nine countries, the USA is the dominant market, with the covered product categories representing more than 60% of global sales. India represented the lowest revenue market, with <$13 million. Within each country, the included categories represented between 78% and 100% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the 10 product categories included in analysis, 'Dairy' represented the highest sales value and 'Sauces, Dressings and Spreads' the largest number of products.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Kraft Heinz products and sales-weighted mean nutrient profile of Kraft Heinz products*

Figure 11.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Kraft Heinz products*

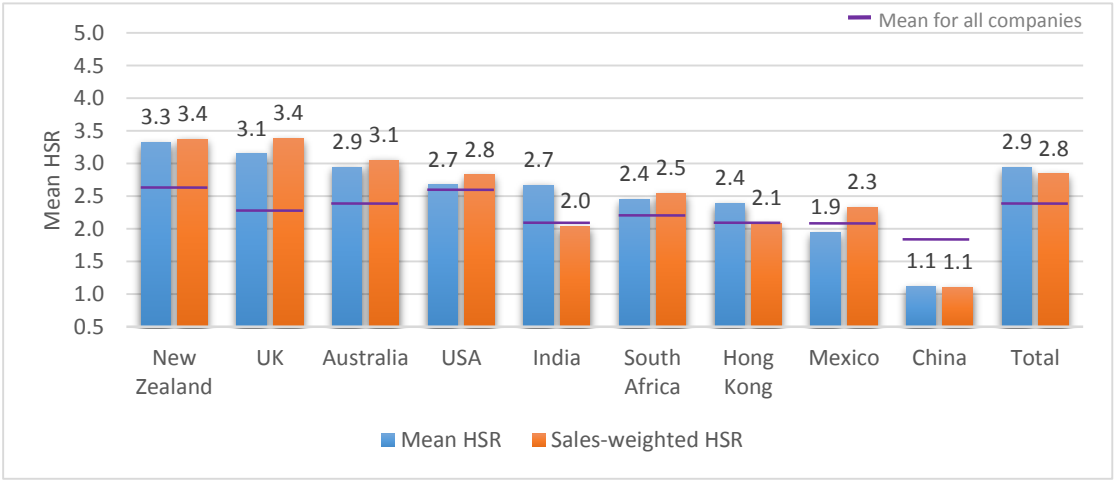
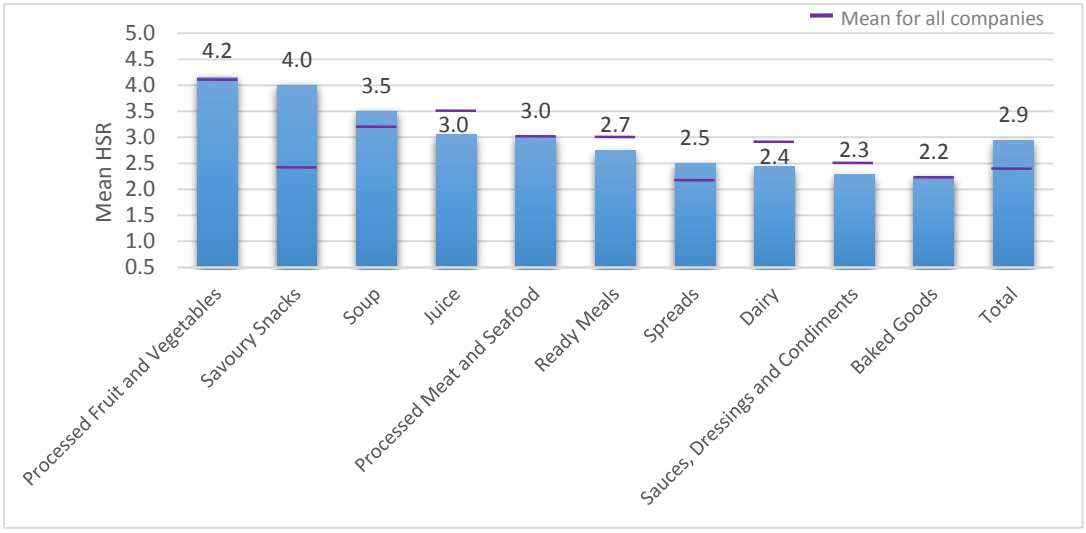


Figure 11.2 *Mean Health Star Rating by category for Kraft Heinz products*



Kraft Heinz had an overall mean HSR of 2.9 which decreased slightly to 2.8 when results were weighted by sales (Figure 11.1). Out of the nine countries included in the Kraft Heinz analysis, New Zealand had the highest mean HSR both before and after results were weighted by sales (3.3 and 3.4 respectively), followed by the UK (3.1 and 3.4 respectively), with China having the lowest HSR by far of 1.1. When results were examined by category (Figure 11.2), the highest mean HSR was seen in the 'Processed Fruit and Vegetables' category (4.2), followed by 'Savoury Snacks' (4.0), with 'Baked Goods' having the lowest mean HSR of all Kraft Heinz product categories (2.2). Kraft Heinz sells products in a wide variety of product categories, and so country rankings were heavily affected by which product categories were sold. For example, New Zealand, the UK and Australia were the top three ranked countries for Kraft Heinz, and these were the only countries to have a substantive number of products in the highest ranked category; 'Processed Fruit and Vegetables'. Conversely, Kraft Heinz in China sold only products in the low-ranked 'Sauces, Dressings and Condiments' category. Interestingly, the three highest-ranked categories combined represented less than $3 billion in sales in 2016, whereas the lowest ranked three categories represented >$10 billion.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Kraft Heinz products considered "healthy" and sales-weighted proportion of Kraft Heinz products considered "healthy"*

Figure 11.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Kraft Heinz products*

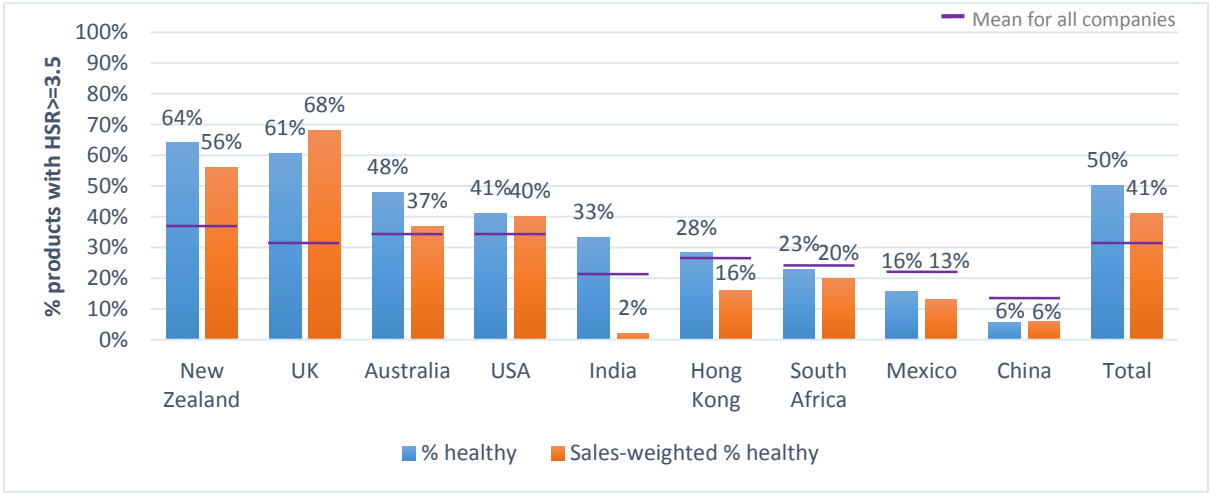
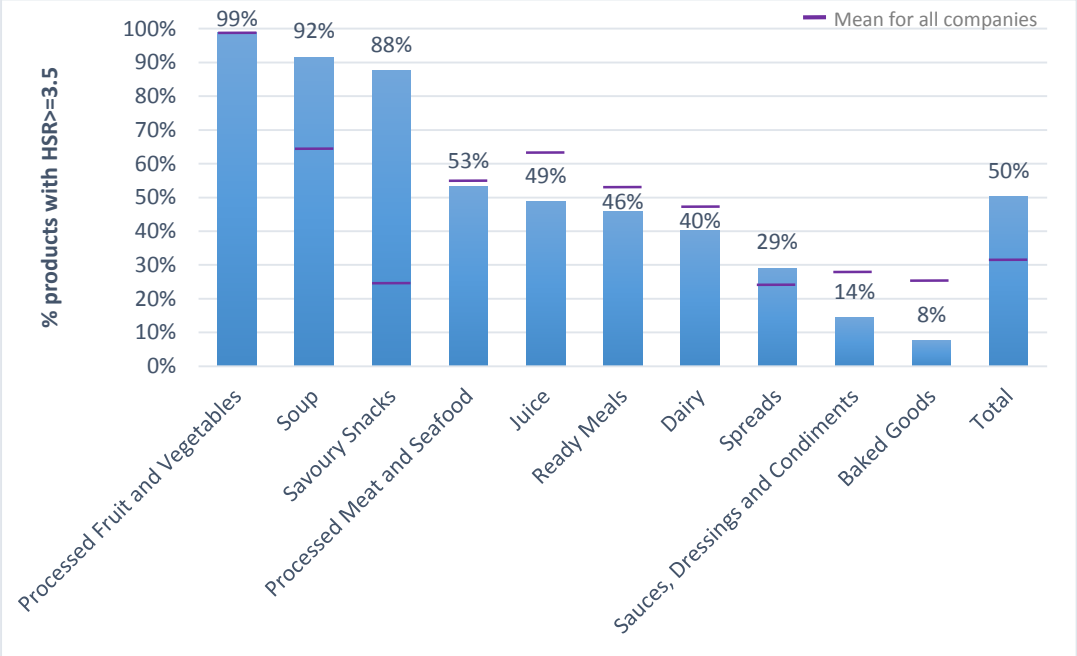


Figure 11.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Kraft Heinz products*



Overall, Kraft Heinz had half of all products across the nine countries with an HSR of 3.5 or greater (50%), which decreased to 41% when results were weighted by sales (Figure 11.3) illustrating that products of lower nutritional quality contributed more to annual 2016 sales than products of higher nutritional quality. Just as with the overall country rankings, New Zealand, the UK and Australia ranked highest in terms of the proportion of products receiving an HSR of 3.5 or more and China ranked the lowest. However, when results were weighted by sales, India took over China as the lowest ranked country, with only 2% of its sales having an HSR>=3.5. Just as with the overall rankings, the driving force behind the UK, New Zealand and Australia's higher proportions of products considered "healthy" using the HSR was the fact that these countries sold products in categories that had a higher proportion of products with >=3.5 such as 'Processed Fruit and Vegetables' (Figure 11.4).

ANALYSIS 5 and 6: *Country and category rankings based upon proportion of Kraft Heinz products meeting WHO Euro criteria*

Figure 11.5 *Proportions of Kraft Heinz products meeting WHO Euro criteria for marketing to children – by Country*

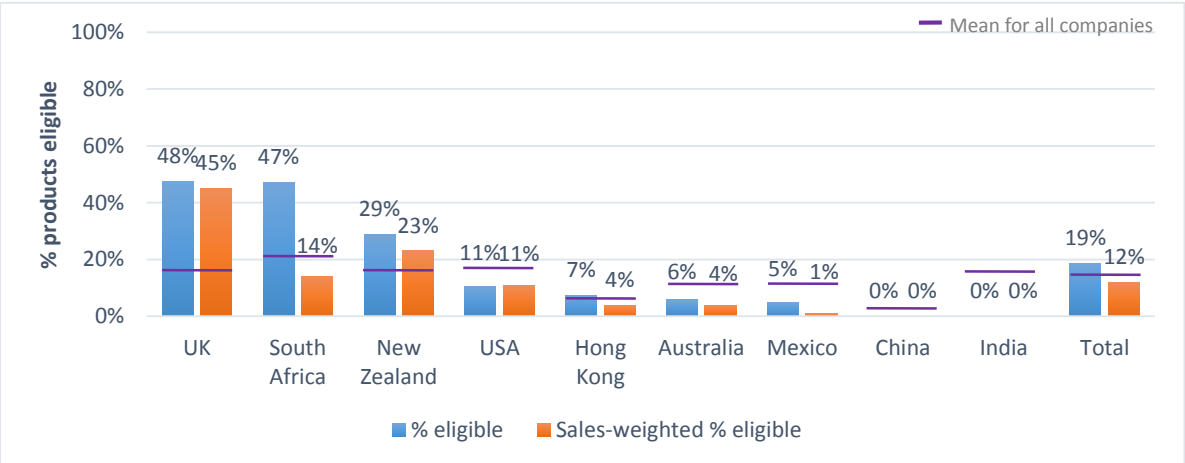
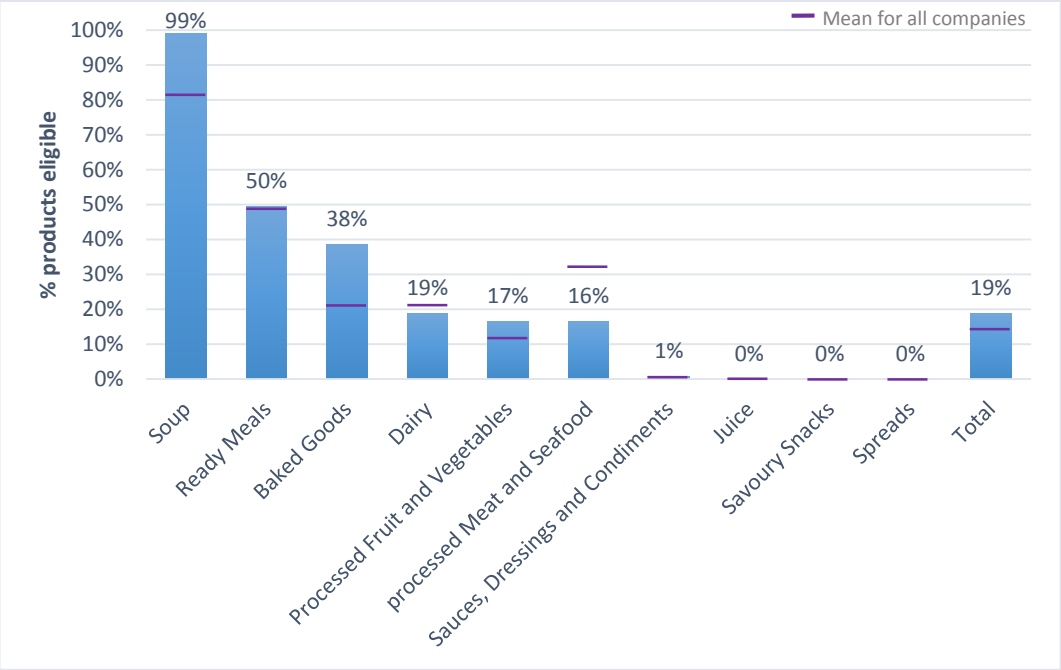


Figure 11.6 *Proportions of Kraft Heinz products meeting WHO Euro criteria for marketing to children – by Category*



Overall less than 20% of Kraft Heinz products (19%) were eligible for marketing to children under the WHO Euro criteria (Figure 11.5), decreasing to 12% when results were weighted by sales, again indicating that products of lower nutritional quality contributed more to annual 2016 sales than products of higher nutritional quality. The UK had the highest proportion of products eligible for marketing to children (48%) followed by South Africa with 47%, with China and India both selling zero products that were eligible for marketing to children. However, results changed somewhat when sales-weighting was applied, with South Africa in particular having a huge decrease in the proportion of products eligible for marketing to children (14%). In fact, sales-weighting resulted in a decrease across all countries in the proportion of products eligible for marketing to children. Results by category using the WHO Euro model were very different to the HSR-based results, with the 'Soup' category having the highest proportion of products eligible for marketing to children (99%), followed by 'Ready Meals' (50%) and 'Baked Goods' (38%) (Figure 11.6).

More specific results broken down by company and country for Kraft Heinz can be seen in Appendix B.

COMPANY 12: LACTALIS

Products included

There were 645 identified products manufactured by Lactalis in seven countries. There was sufficient nutrient information for 561 products to generate a Health Star Rating and for 583 to generate results for the WHO Euro analysis. There were 61 products (9%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 12.1 shows the breakdown of products in each category by country.

Table 12.1 *Number of Lactalis products by country in Euromonitor categories*

	Dairy	Ice Cream and Frozen Desserts	Juice	RTD Coffee	**Total**	**% sales***
Australia	288	-	-	9	**297**	**100%**
Hong Kong	50	-	-	-	**50**	**100%**
Mexico	11	-	-	-	**11**	**100%**
New Zealand	-	-	-	2	**2**	**100%**
South Africa	113	1	15	-	**129**	**100%**
UK	119	-	-	-	**119**	**100%**
USA	37	-	-	-	**37**	**100%**
Total	618	**1**	**15**	**11**	**645**	**100%**

* Note that this value indicates % sales from included categories for each country

The seven countries used in this analysis represented 16% of Lactalis total global food and beverage sales in 2016. The majority of Lactalis' global sales derive from European countries not included in the current analysis. Of the seven included countries, Australia represented the highest revenue, with >$1 billion, and New Zealand the lowest revenue with <$1 million. Within each country, the included categories represented 100% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the three product categories included in analysis, 'Dairy' represented the largest amount of products and the highest sales value.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Lactalis products and sales-weighted mean nutrient profile of Lactalis products*

Figure 12.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Lactalis products*

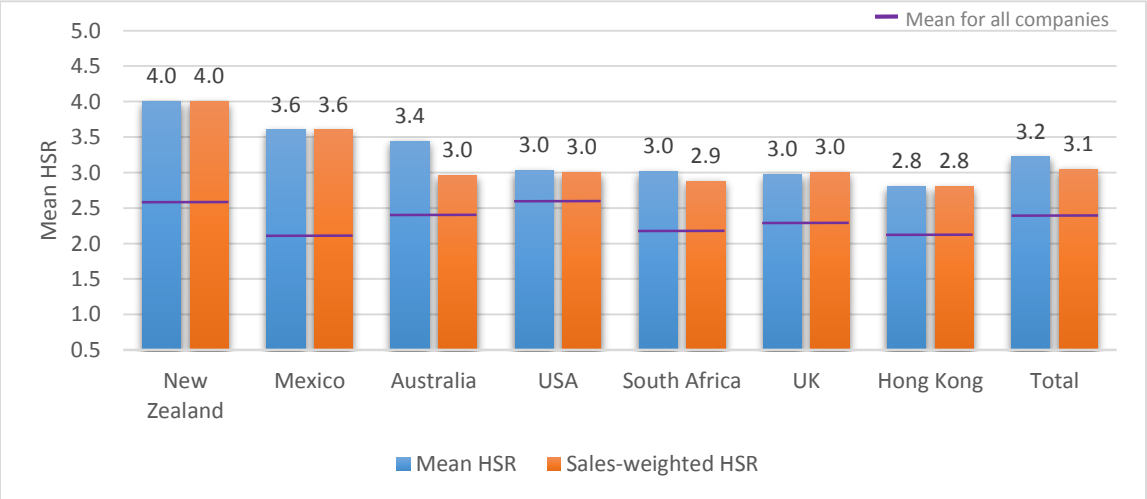
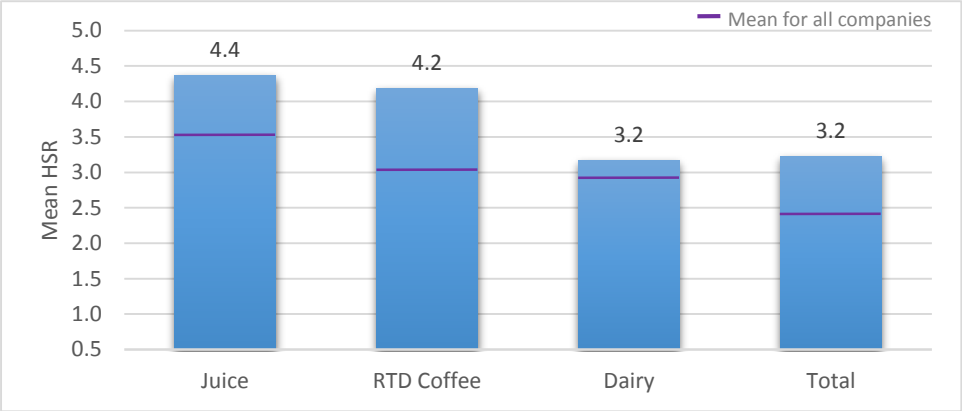


Figure 12.2 *Mean Health Star Rating by category for Lactalis products*



Lactalis had an overall mean HSR of 3.2 which decreased slightly to 3.1 when results were weighted by sales (Figure 12.1). Out of the seven countries included in Lactalis' analysis, New Zealand had the highest mean HSR both before and after results were weighted by sales (4.0), followed by Mexico with an HSR of 3.6, with Hong Kong having the lowest HSR of 2.8. When Lactalis results were examined by category (Figure 12.2), the highest mean HSR was seen in the 'Juice' (4.4) category, followed by 'RTD Coffee' (4.2), with 'Dairy' having the lowest mean HSR of all Lactalis product categories (3.2). It's important to note, however, that even the 'Dairy' category, despite having the lowest mean HSR, still scored relatively highly when compared to other categories and countries overall in this analysis. 'Dairy' was also the category with the largest number of products, with only two countries selling items in the higher-scoring 'RTD Coffee' and 'Juice' categories. Lactalis' decrease in mean HSR when sales were taken into account is explained in part by the fact that the 'Dairy' category ranked lowest, yet represented the bulk of Lactalis sales in 2016 across the seven countries examined, with >$2 billion compared to 'Juice' and 'RTD Coffee' combined representing <$2 million.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Lactalis products considered "healthy" and sales-weighted proportion of Lactalis products considered "healthy"*

Figure 12.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Lactalis products*

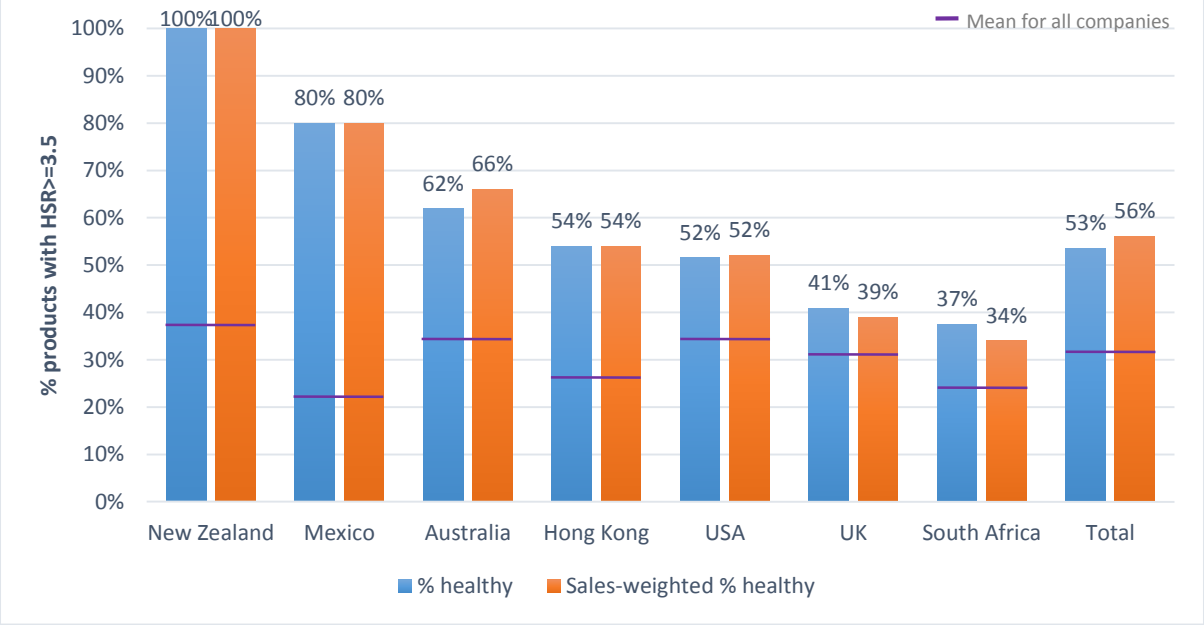
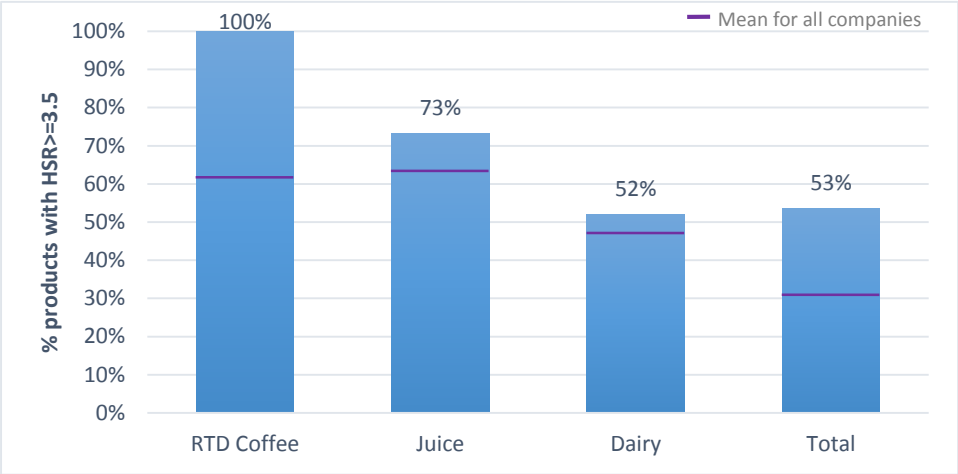


Figure 12.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Lactalis products*



Overall, Lactalis had more than half of products in all seven countries with an HSR of 3.5 or greater (53%), which increased slightly to 56% when results were weighted by sales (Figure 12.3) indicating that products of higher nutritional quality account contributed more to annual 2016 sales than products of lower nutritional quality. Lactalis New Zealand had both the highest mean HSR of all countries as well as the highest proportion of products receiving an HSR of 3.5 or more (100%), with South Africa having the lowest proportion (37%). Rankings did not change when sales-weighting of results was applied. It's important to note that New Zealand only had two products included in analysis, both in the high-scoring 'RTD Coffee' category, which explains its high ranking in this analysis. All categories had >50% of products receiving >=3.5 HSR, a key reason for Lactalis' high overall results compared to other companies examined in this report.

ANALYSIS 5 and 6: *Country and category rankings based upon proportion of Lactalis products meeting WHO Euro criteria*

Figure 12.5 *Proportions of Lactalis products meeting WHO Euro criteria for marketing to children – by Country*

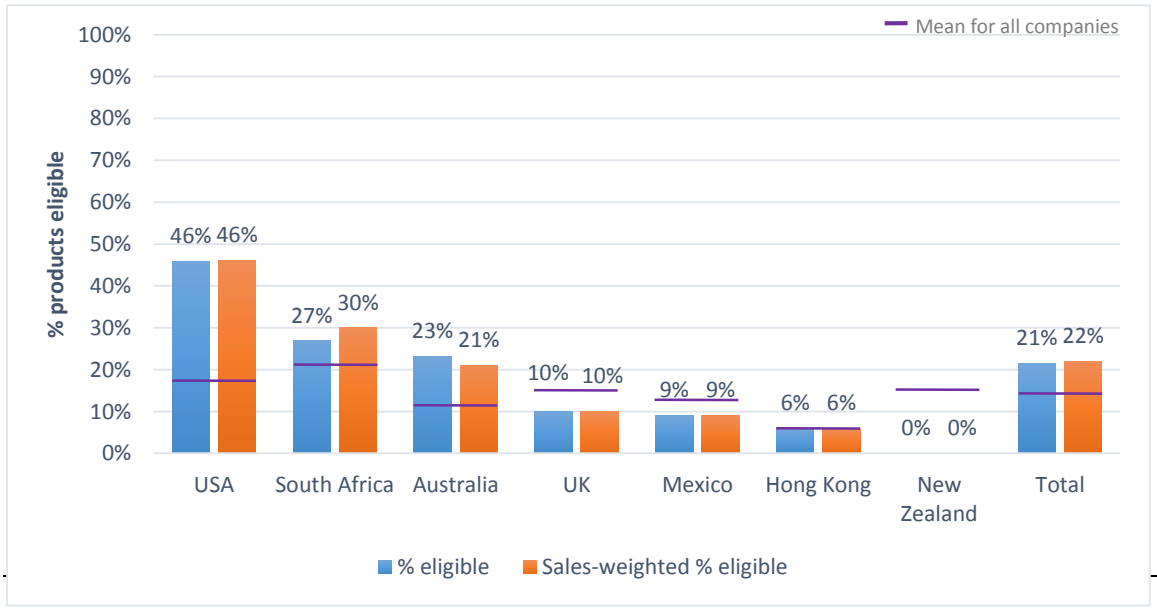
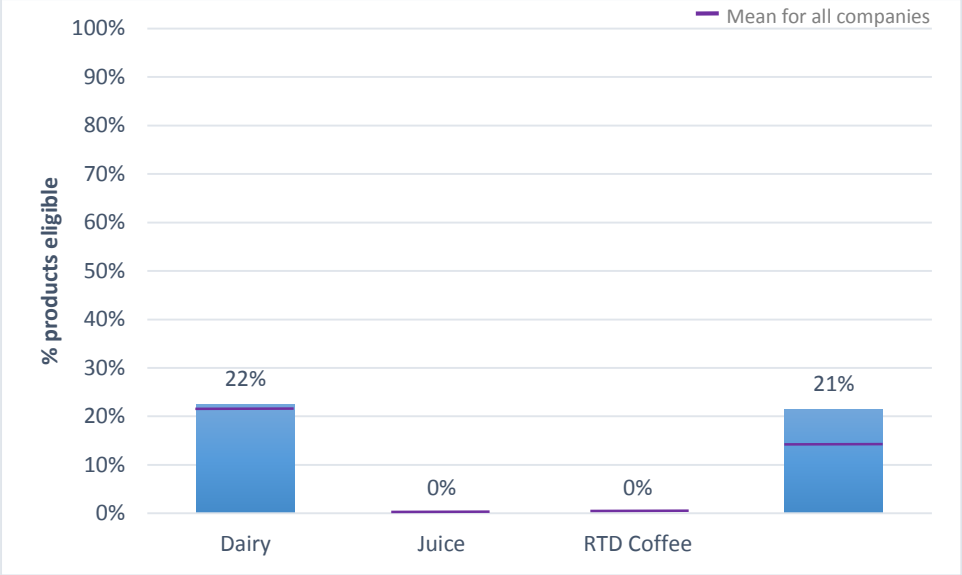


Figure 12.6 *Proportions of Lactalis products meeting WHO Euro criteria for marketing to children – by Category*



Results using the WHO Euro criteria told a very different story to the HSR results with >50% of products considered "healthy" using the HSR, and a comparatively low proportion of Lactalis products (21%) eligible for marketing to children (Figure 12.5), increasing slightly to 22% when results were weighted by sales. Despite New Zealand being ranked first under both HSR metrics, it was ranked last using the WHO Euro criteria due to milk-based drinks with added sugar being ineligible for marketing to children under this scheme. In this case, the USA had the highest proportion of products eligible for marketing to children (46%) followed by South Africa with 27%. Also a very different category-based result under the WHO criteria (Figure 12.6), with 'Dairy' being the only category with any products eligible for marketing to children (22%), compared with 'Dairy' ranking lowest out of the categories using the HSR metric.

More specific results broken down by company and country for Lactalis can be seen in Appendix B.

COMPANY 13: MARS

Products included

There were 2,100 identified products manufactured by Mars in nine countries. There was sufficient nutrient information for 2,077 products to generate a Health Star Rating and for 1,936 to generate results for the WHO Euro analysis. There were 164 products (8%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 13.1 shows the breakdown of products in each category by country.

Table 13.1 *Number of Mars products by country in Euromonitor categories*

	Confectio-nery	Ice Cream and Frozen Desserts	Ready Meals	Rice, Pasta and Noodles	Sauces, Dressings and Condiments	Savoury Snacks	Soup	Spreads	Sweet Biscuits, Snack Bars and Fruit Snacks	**Total**	**% sales***
Australia	140	7	-	28	230	-	-	1	-	**406**	**100%**
China	146	-	-	-	-	-	-	-	-	**146**	**100%**
Hong Kong	77	-	-	-	5	-	-	-	-	**82**	**99%**
India	18	-	-	-	-	-	-	-	-	**18**	**100%**
Mexico	22	-	-	-	-	-	-	-	-	**22**	**100%**
NZ	95	-	-	28	69	-	-	-	-	**192**	**99%**
South Africa	23	-	9	-	74	-	45	-	-	**151**	**100%**
UK	204	16	-	81	123	-	-	-	9	**433**	**98%**
USA	545	32	-	61	-	12	-	-	-	**650**	**99%**
Total	**1,270**	**55**	**9**	**198**	**501**	**12**	**45**	**1**	**9**	**2,100**	**99%**

* Note that this value indicates % sales from included categories for each country

The nine countries used in this analysis represented 61% of Mars total global food and beverage sales in 2016. Of these nine countries, the USA represented the highest revenue, with >$9 billion, and South Africa the lowest revenue with less than $70 million. Within each country, the included categories represented between 98% and 100% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the nine product categories included in analysis, 'Confectionery' represented the largest amount of products and the highest sales value.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Mars products and sales-weighted mean nutrient profile of Mars products*

Figure 13.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Mars products*

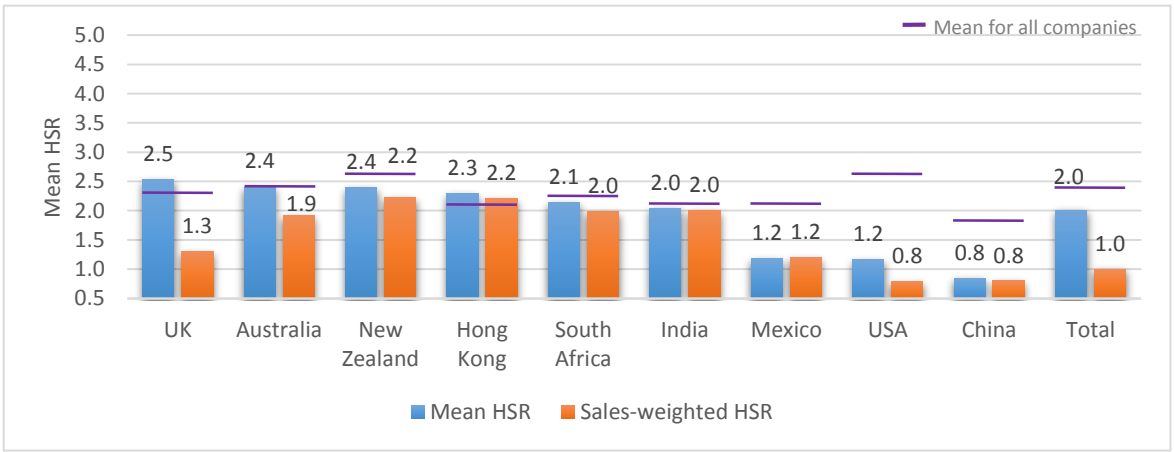
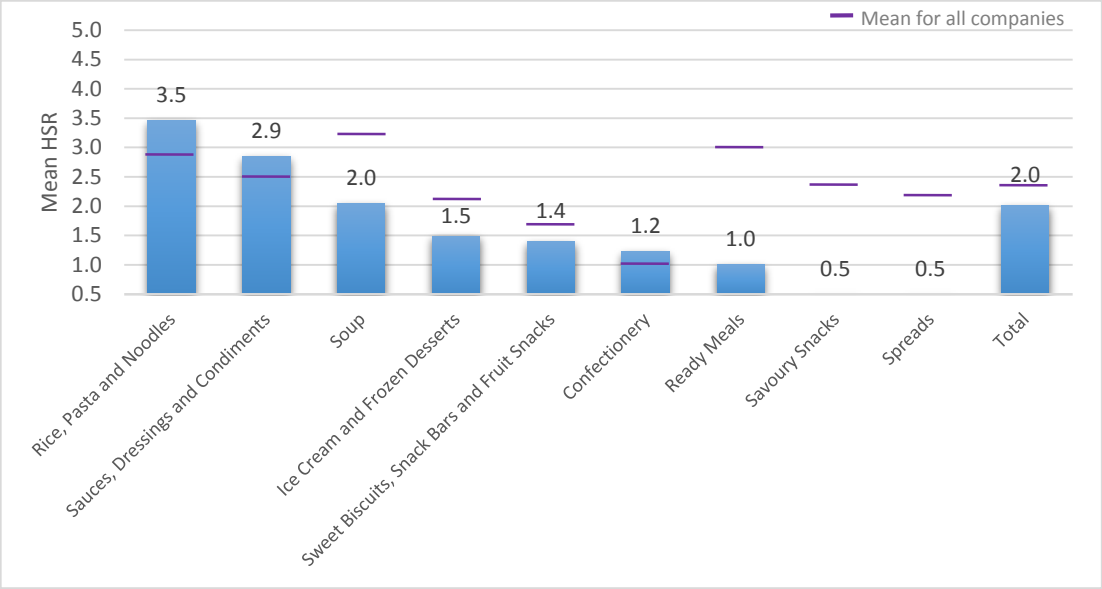


Figure 13.2 *Mean Health Star Rating by category for Mars products*



Mars had a low overall mean HSR of 2.0 which decreased by a whole point to 1.0 when results were weighted by sales (Figure 13.1) illustrating its products with lower HSRs accounted for a larger proportion of sales than those with higher HSRs. This was not surprising considering confectionery items made up the majority of products examined in each country in this analysis. Out of the nine countries included in the Mars analysis, the UK had the highest mean HSR before results were weighted by sales (2.5), with China having the lowest HSR of 0.8. However, rankings changed substantially when sales-weighting of results was applied, with the UK dropping from first to sixth place, and the USA equalling China in the lowest ranking with a sales-weighted HSR of 0.8. When results were examined by category (Figure 13.2), the highest mean HSR was seen in the 'Rice, Pasta and Noodles' category (3.5), followed by 'Sauces, Dressings and Condiments' (2.9), with 'Savoury Snacks' and 'Spreads' having the lowest mean HSR of all Mars product categories (0.5). The decrease in mean HSR when sales-weighting was applied is explained in part by the fact that the 'Confectionery' category alone across the nine countries represented >$14 billion of sales in 2016, with the remaining categories combined representing <$2 billion.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Mars products considered "healthy" and sales-weighted proportion of Mars products considered "healthy"*

Figure 13.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Mars products*

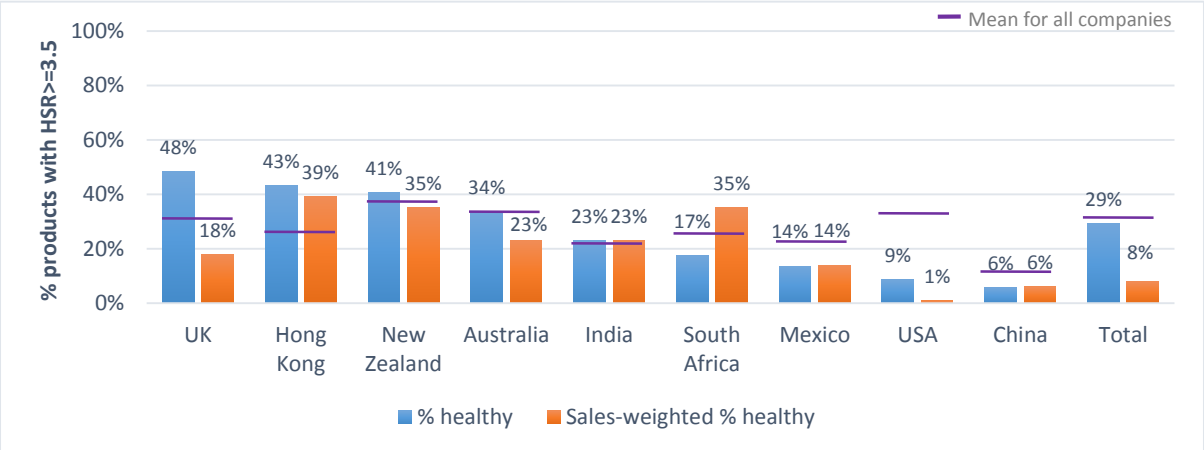
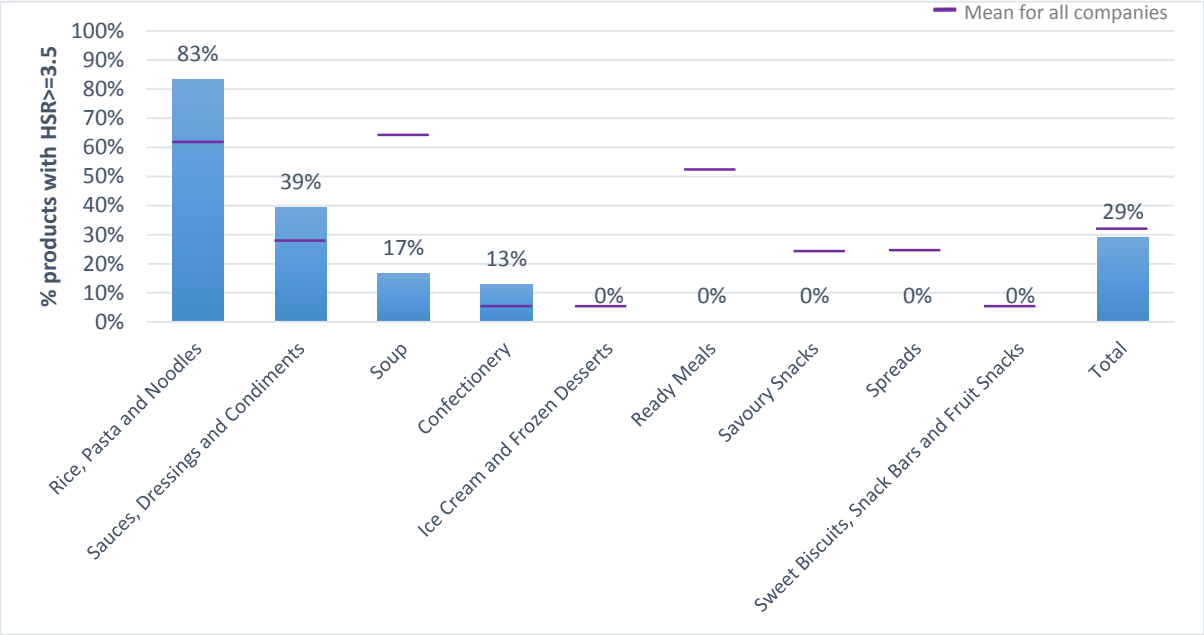


Figure 13.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Mars products*



Overall, Mars had a low proportion of products in all four countries with an HSR of 3.5 or greater (29%), which decreased substantially to 8% when results were weighted by sales (Figure 13.3) again illustrating that products of lower nutritional quality contributed more to annual 2016 sales than products of higher nutritional quality. The UK had the largest proportion of products receiving an HSR of 3.5 or more (48%). However, when results were weighted by sales, the UK again dropped from first to sixth position out of the nine countries examined. China and the USA ranked last both before and after sales-weighting was applied. The UK's large drop in rankings is mainly explained by the huge difference in dollar sales that Mars confectionery products contribute in the UK (>$2 billion) versus other product categories such as 'Rice, Pasta and Noodles' (<$300 million). This is also an important consideration when looking at results in Figures 13.2 and 13.4, with weighting not applied to category-based results.

ANALYSIS 5 and 6: *Country and category rankings based upon proportion of Mars products meeting WHO Euro criteria*

Figure 13.5 *Proportions of Mars products meeting WHO Euro criteria for marketing to children – by Country*

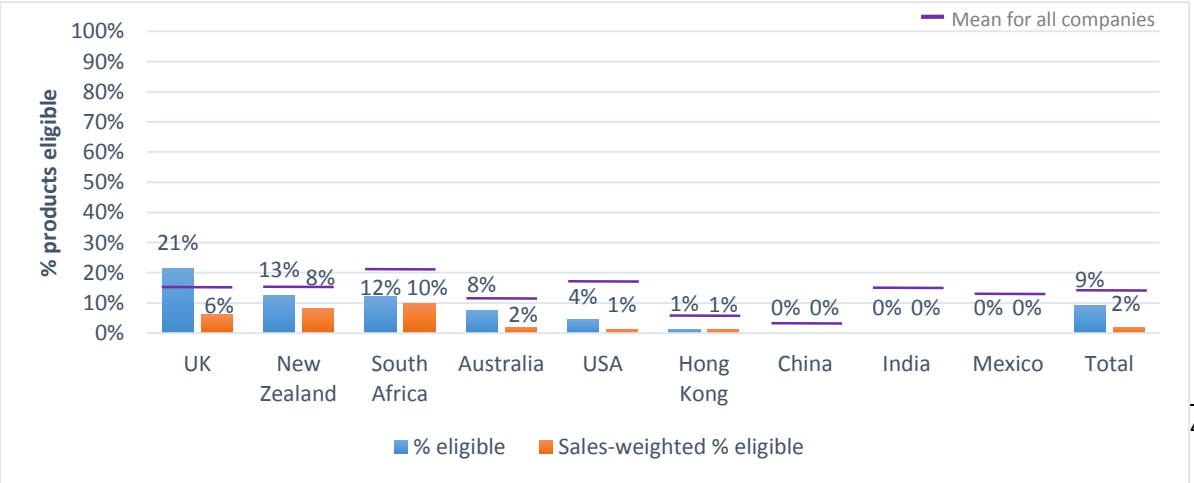
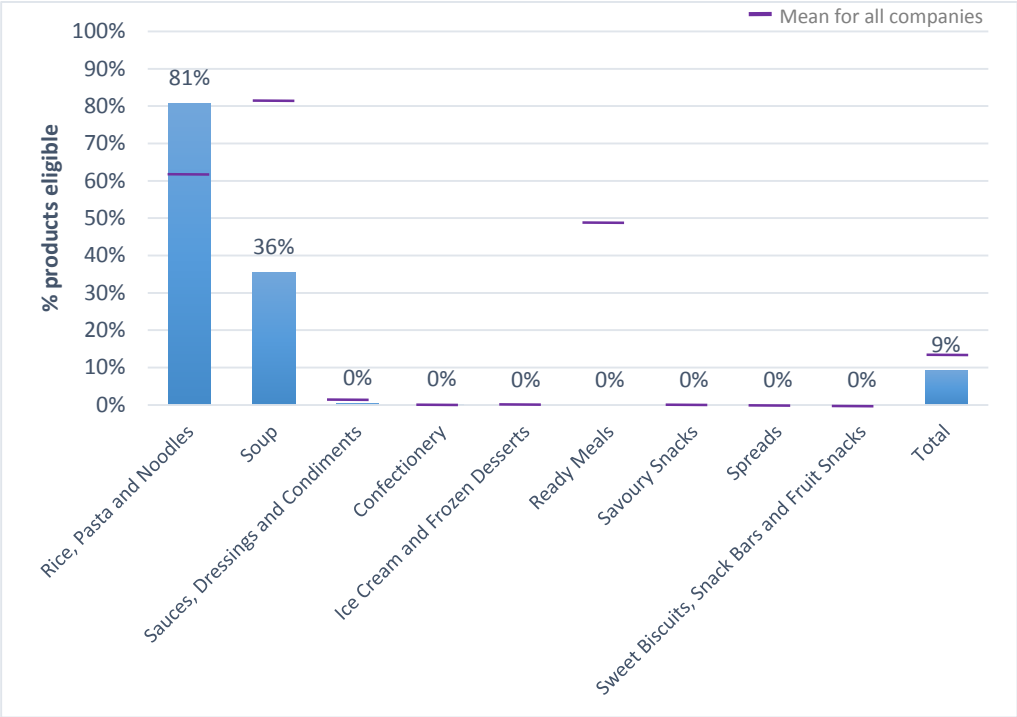


Figure 13.6 *Proportions of Mars products meeting WHO Euro criteria for marketing to children – by Category*



Overall a very low proportion of Mars products (9%) were eligible for marketing to children under the WHO Euro criteria (Figure 13.5), dropping substantially to only 2% when results were weighted by sales. The UK once again had the highest proportion of products eligible for marketing to children before sales-weighting was applied (21%), falling to third place once sales-weighting was applied. China, India and Mexico all sold zero products that were eligible for marketing to children. Confectionery dominating the product portfolios of all countries explains these results, with all products in the 'Confectionery' category ineligible for marketing to children using the WHO Euro criteria.

More specific results broken down by company and country for Mars can be seen in Appendix B.

COMPANY 14: MEIJI

Products included

There were 79 identified products manufactured by Meiji in three countries. There was sufficient nutrient information for 75 products to generate a Health Star Rating and for 75 to generate results for the WHO Euro analysis. There were four products (5%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 14.1 shows the breakdown of products in each category by country.

Table 14.1 *Number of Meiji products by country in Euromonitor categories*

	Confectionery	Ice Cream and Frozen Desserts	Sweet Biscuits, Snack Bars and Fruit Snacks	**Total**	**% sales***
Australia	-	-	4	**4**	**100%**
China	12	21	-	**33**	**100%**
Hong Kong	29	4	9	**42**	**100%**
Total	**41**	**25**	**13**	**79**	**100%**

* Note that this value indicates % sales from included categories for each country

The three countries used in this analysis represented only 2% of Meiji total global food and beverage sales in 2016. Of these three countries, China represented the highest revenue market and Australia the lowest. Its main and home market (Japan) is not included in the analysis. Within each country, the included categories represented 100% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the three product categories included in analysis, 'Confectionery' represented the largest amount of products and the highest sales value.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Meiji products and sales-weighted mean nutrient profile of Meiji products*

Figure 14.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Meiji products*

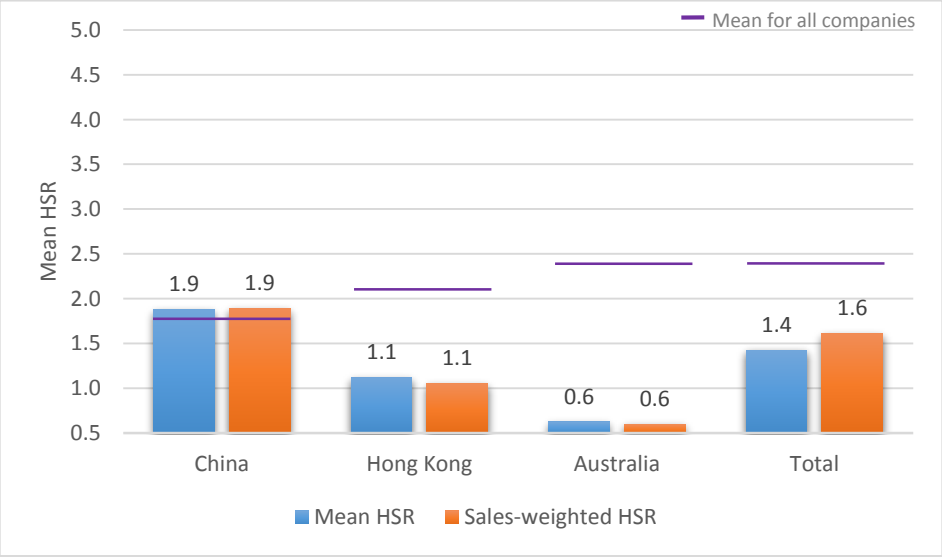
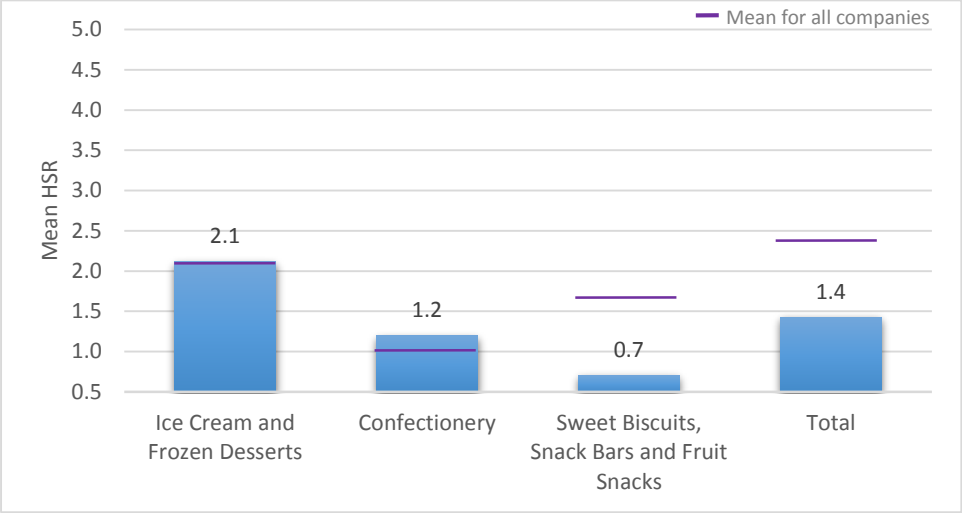


Figure 14.2 *Mean Health Star Rating by category for Meiji products*



Meiji had a low overall mean HSR of 1.4 which increased slightly to 1.6 when results were weighted by sales (Figure 14.1) illustrating that its products with slightly higher HSRs accounted for a slightly larger proportion of sales than those with lower HSRs. Out of the three countries included in Meiji's analysis, China had the highest mean HSR both before and after results were weighted by sales (1.9), with Australia having the lowest HSR of 0.6. These results were mainly driven by the types of products available in each country, with 'Ice Cream and Frozen Desserts' being the category with the highest mean HSR, and China selling the majority of these products (Figure 14.2). It is important to note that the three countries included in the current analysis represent only a very small proportion of Meiji global sales, and so it is unknown whether results would change substantially with the inclusion of other countries.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Meiji products considered "healthy" and sales-weighted proportion of Meiji products considered "healthy"*

Figure 14.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Meiji products*

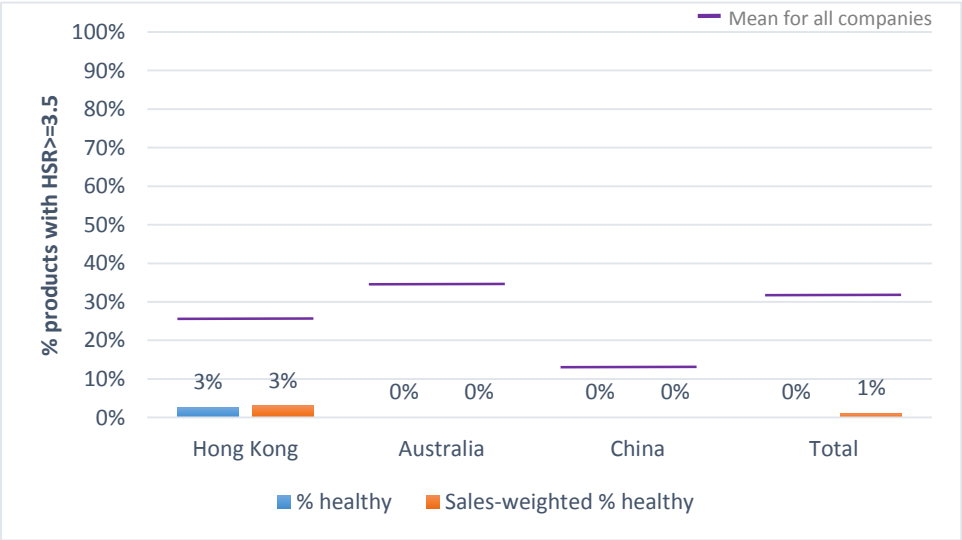
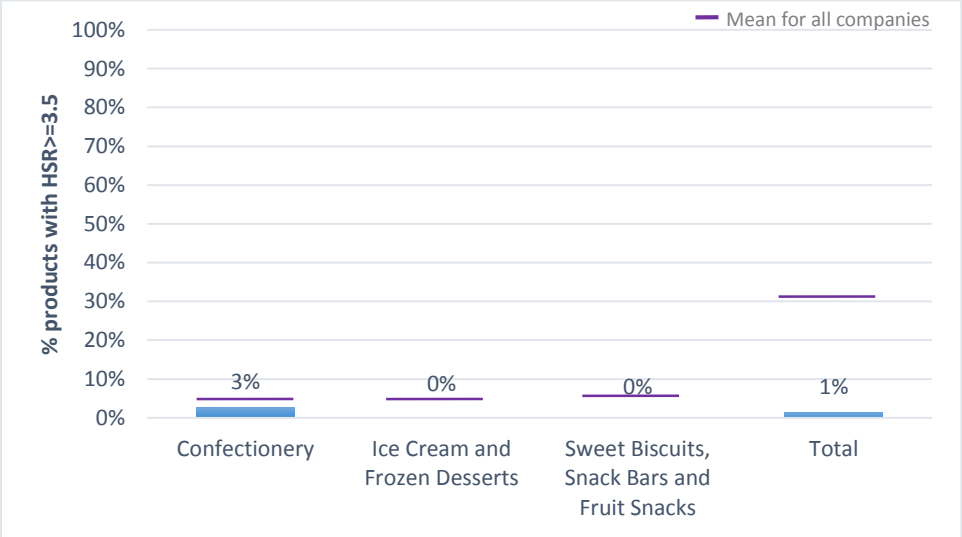


Figure 14.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Meiji products*



Overall, an extremely low proportion of Meiji products in all three countries had an HSR of 3.5 or greater (1%) (Figure 14.3). With products lists dominated by categories that would be considered 'less healthy' such as 'Confectionery' and 'Ice Cream and Frozen Desserts', this finding is not surprising. Hong Kong was the only country with any products receiving an HSR or >=3.5.

ANALYSIS 5 and 6: *Country and category rankings based upon proportion of Meiji products meeting WHO Euro criteria*

Overall zero Meiji products were eligible for marketing to children. This is due to the fact that products in all three categories are automatically ineligible for marketing under the WHO Euro criteria.

More specific results broken down by company and country for Meiji can be seen in Appendix B.

COMPANY 15: MONDELEZ

Products included

There were 2,411 identified products manufactured by Mondelez in eight countries. There was sufficient nutrient information for 2,047 products to generate a Health Star Rating and for 2,269 to generate results for the WHO Euro analysis. There were 140 products (6%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 15.1 shows the breakdown of products in each category by country.

***Table 15.1** Number of Mondelez products by country in Euromonitor subsets*

	Baked Goods	Concentrates	Confectionery	Dairy	Other Hot Drinks	Savoury Snacks	Sweet Biscuits, Snack Bars and Fruit Snacks	**Total**	**% sales**
Australia	-	-	356	-	9	-	37	**402**	**79%**
China	-	14	54	-	-	7	111	**186**	**97%**
India	-	12	47	-	11	-	9	**79**	**100%**
Mexico	-	40	12	10	-	3	38	**103**	**100%**
New Zealand	-	-	225	-	4	7	19	**255**	**95%**
South Africa	-	-	81	2	4	5	5	**97**	**99%**
UK	61	-	428	69	46	-	133	**737**	**94%**
USA	-	-	170	4	-	165	213	**552**	**100%**
Total	**61**	**66**	**1,373**	**85**	**74**	**187**	**565**	**2,411**	**97%**

* Note that this value indicates % sales from included categories for each country

The eight countries used in this analysis represented 42% of Mondelez total global food and beverage sales in 2016. Of these eight countries, the USA represented the highest revenue, with >$8 billion, and New Zealand the lowest revenue with less than $300 million. Within each country, the included categories represented between 79% and 100% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the seven product categories included in analysis, 'Confectionery' represented the largest amount of products and the highest sales value by far.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Mondelez products and sales-weighted mean nutrient profile of Mondelez products*

***Figure 15.1** Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Mondelez products*

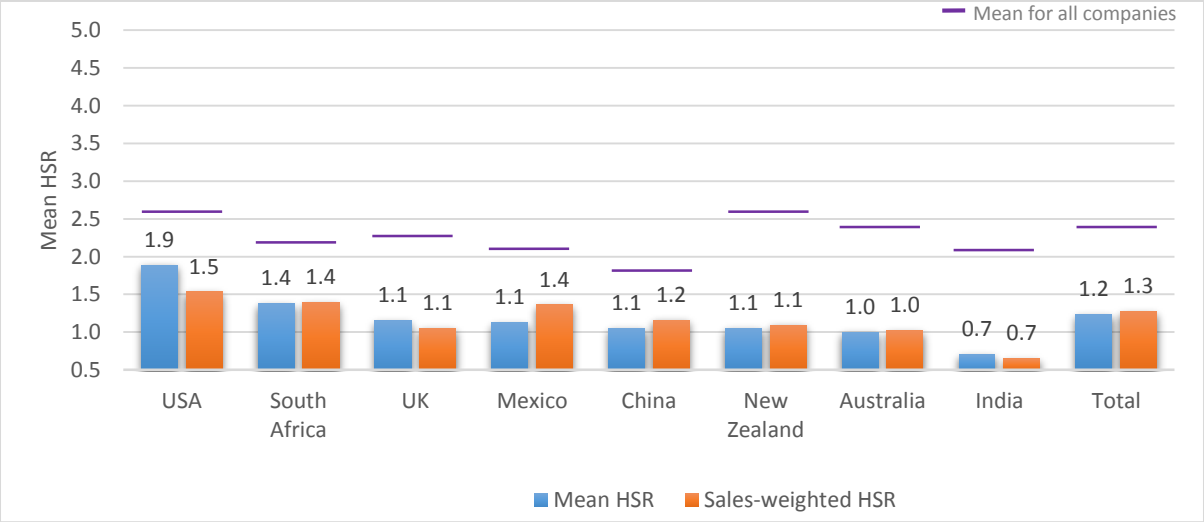
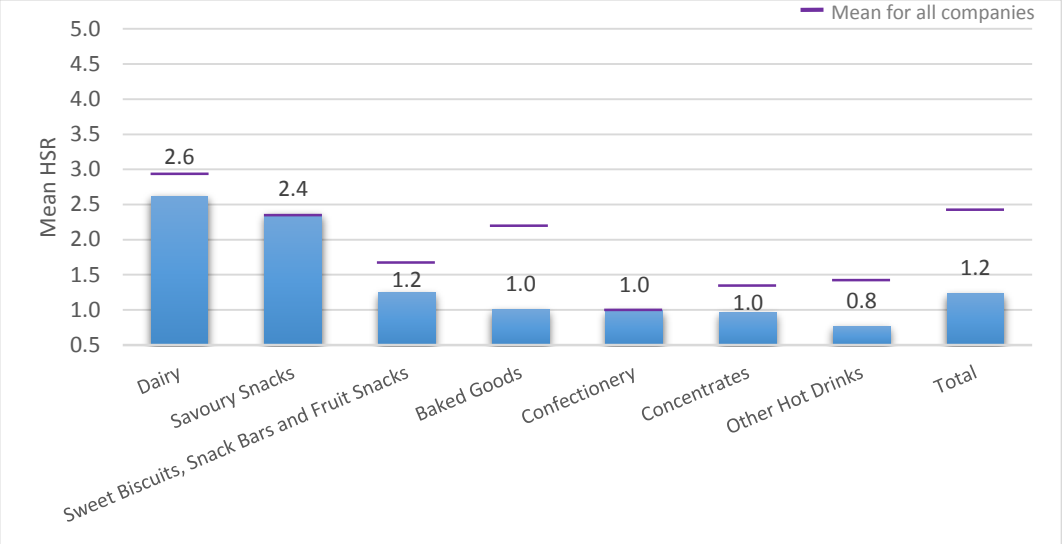


Figure 15.2 *Mean Health Star Rating by category for Mondelez products*



Mondelez had a low overall mean HSR of 1.2 which increased slightly to 1.3 when results were weighted by sales (Figure 15.1). Out of the eight countries included in analysis, the USA had the highest mean HSR both before and after results were weighted by sales (1.9 and 1.5 respectively), followed by South Africa with a mean HSR of 1.4, with India having the lowest HSR of 0.7. When Mondelez results were examined by category (Figure 15.2), the highest mean HSR was seen in the 'Dairy' category (2.6), followed by 'Savoury Snacks' (2.4), with 'Concentrates' and 'Other Hot Drinks' having the lowest mean HSRs of all Mondelez product categories. Note that all analyses were done using data per 100g/mL, which is an important consideration for the lower-ranked Mondelez categories (e.g. Concentrates), with these products generally consumed in small amounts and so likely contribute less to daily nutrient intake compared to other food categories. These product categories also represent a substantially lower proportion of product sales for Mondelez (<$300 million for 'Other Hot Drinks' for example) compared to categories such as 'Confectionery' which represent more than $8 billion across the eight countries examined.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Mondelez products considered "healthy" and sales-weighted proportion of Mondelez products considered "healthy"*

Figure 15.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Mondelez products*

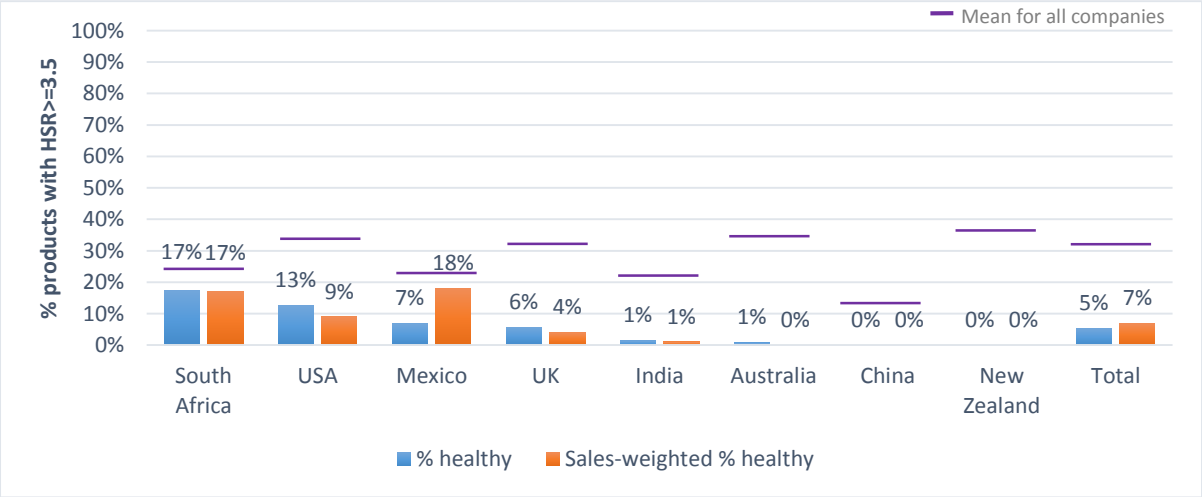
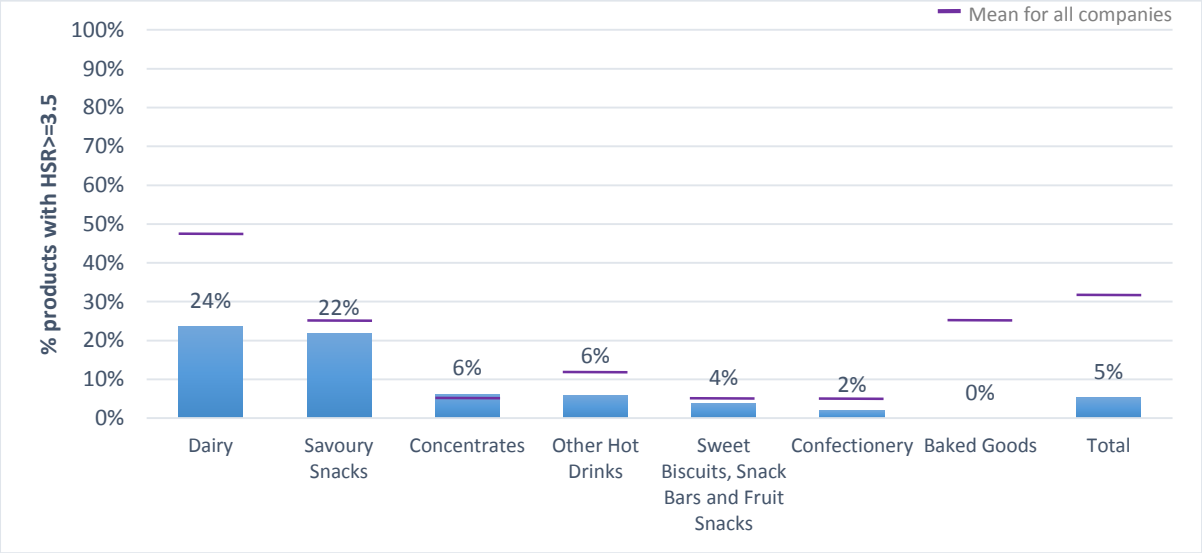


Figure 15.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Mondelez products*



Overall, Mondelez had a very low proportion of sales in all four countries with an HSR of 3.5 or greater (5%), which increased slightly to 7% when results were weighted by sales (Figure 15.3). Mondelez South Africa had the highest proportion of products receiving an HSR of 3.5 or more (17%). However, when results were weighted by sales, Mexico ranked highest in terms of the country with the highest proportion of products considered 'healthy', with 18%. No products in China or New Zealand received an HSR of 3.5 or above. The 'Dairy' category had the highest proportion of products with an HSR>=3.5 (24%), followed by 'Savoury Snacks' with 22% (Figure 15.4). 'Confectionery' and 'Baked Goods' ranked lowest out of the categories included.

ANALYSIS 5 and 6: *Country and category rankings based upon proportion of Mondelez products meeting WHO Euro criteria*

Figure 15.5 *Proportions of Mondelez products meeting WHO Euro criteria for marketing to children – by Country*

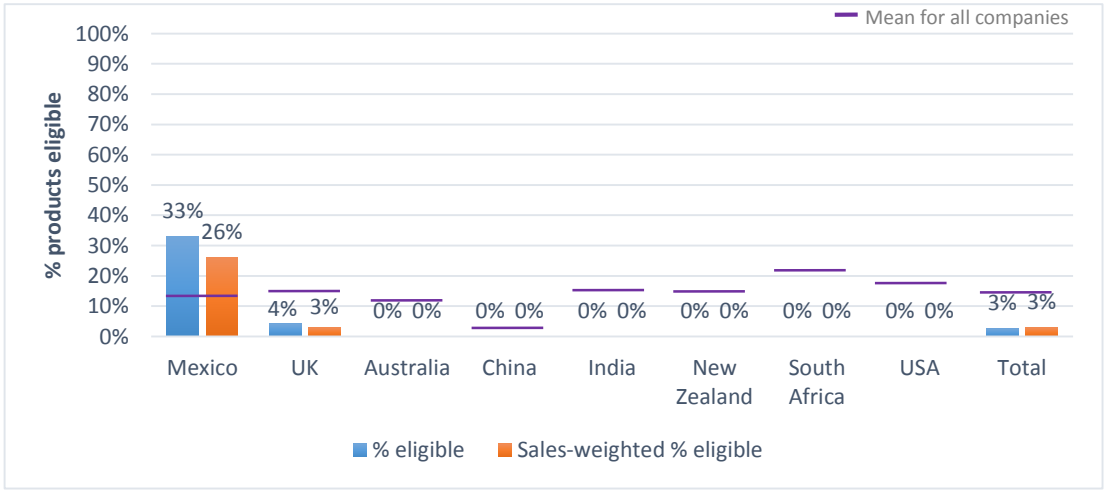
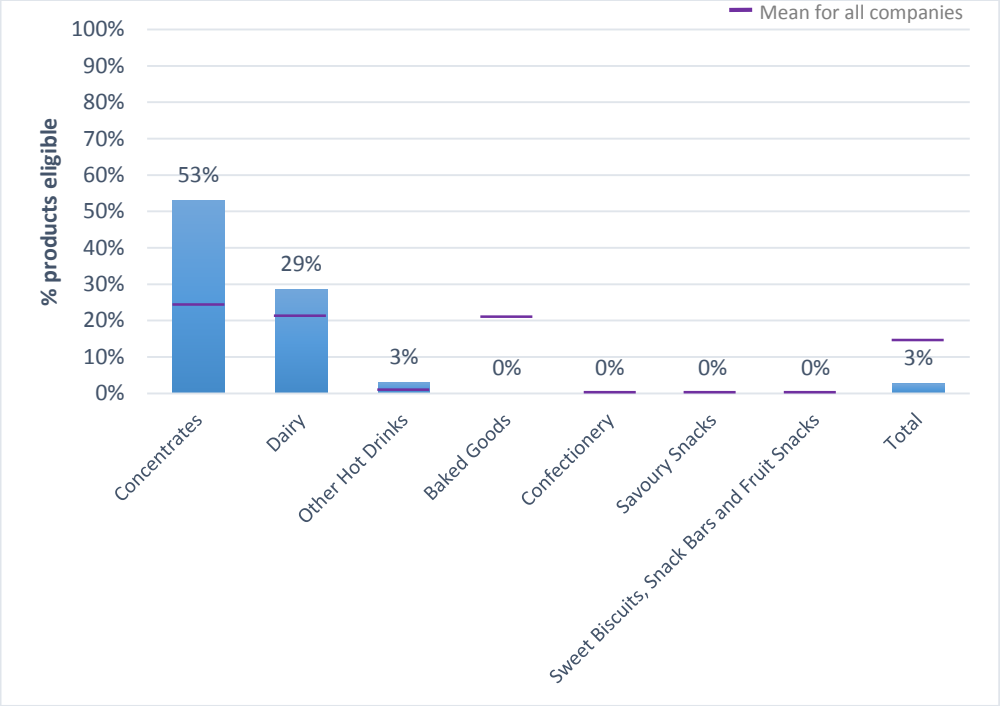


Figure 15.6 *Proportions of Mondelez products meeting WHO Euro criteria for marketing to children – by Category*



Overall a very low proportion of Mondelez products (3%) were eligible for marketing to children under the WHO Euro criteria (Figure 15.5). Mexico by far had the highest proportion of products eligible for marketing to children (33%) followed by the UK with 4%, with all other countries selling zero products that were eligible for marketing to children. These results were driven by the fact that 'Confectionery' dominates most country portfolios, with 'Confectionery' products automatically ineligible for marketing to children under the WHO Euro criteria.

More specific results broken down by company and country for Mondelez can be seen in Appendix B.

COMPANY 16: NESTLÉ

Products included

There were 2,067 identified products manufactured by Nestlé in nine countries. There was sufficient nutrient information for 2,029 products to generate a Health Star Rating and for 2,039 to generate results for the WHO Euro analysis. There were 28 products (1%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 16.1 shows the breakdown of products in each category by country.

Table 16.1 *Number of Nestlé products by country in Euromonitor categories*

	Australia	China	Hong Kong	India	Mexico	NZ	South Africa	UK	USA	**Total**
Bottled Water	-	-	-	-	15	-	-	10	28	**53**
Breakfast Cereals	60	-	-	-	22	-	-	30	-	**112**
Confectionery	94	3	19	5	14	44	29	120	134	**448**
Dairy	19	13	20	10	38	-	11	68	102	**281**
Ice Cream and Frozen Desserts	-	-	34	-	9	-	-	-	301	**344**
Other Hot Drinks	32	-	-	-	-	32	16	34	-	**114**
RTD Coffee	-	5	6	-	-	-	-	-	-	**11**
RTD Tea	-	-	6	-	-	-	-	-	-	**6**
Ready Meals	-	-	-	1	-	-	-	-	528	**529**
Rice, Pasta and Noodles	17	-	-	11	-	18	10	-	-	**56**
Sauces, Dressings and Condiments	-	1	-	6	-	59	5	-	-	**69**
Soup	-	-	-	-	-	19	-	-	-	**19**
Sweet Biscuits, Snack Bars and Fruit Snacks	-	9	-	-	-	-	-	-	-	**9**
Total	**222**	**31**	**85**	**33**	**98**	**172**	**71**	**262**	**1,093**	**2,067**
% sales*	**60%**	**68%**	**71%**	**79%**	**59%**	**62%**	**86%**	**78%**	**94%**	**82%**

* Note that this value indicates % sales from included categories for each country

The nine countries used in this analysis represented 39% of Nestlé total global food and beverage sales in 2016. Of these nine countries, the USA represented the highest revenue by far, with >$15 billion, and New Zealand the lowest revenue with less than $150 million. Within each country, the included categories represented between 59% and 94% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the 13 product categories included in analysis, 'Confectionery' and 'Bottled Water' represented the highest sales values with both categories representing >$5 billion each in the current analysis.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Nestlé products and sales-weighted mean nutrient profile of Nestlé products*

Figure 16.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Nestlé products*

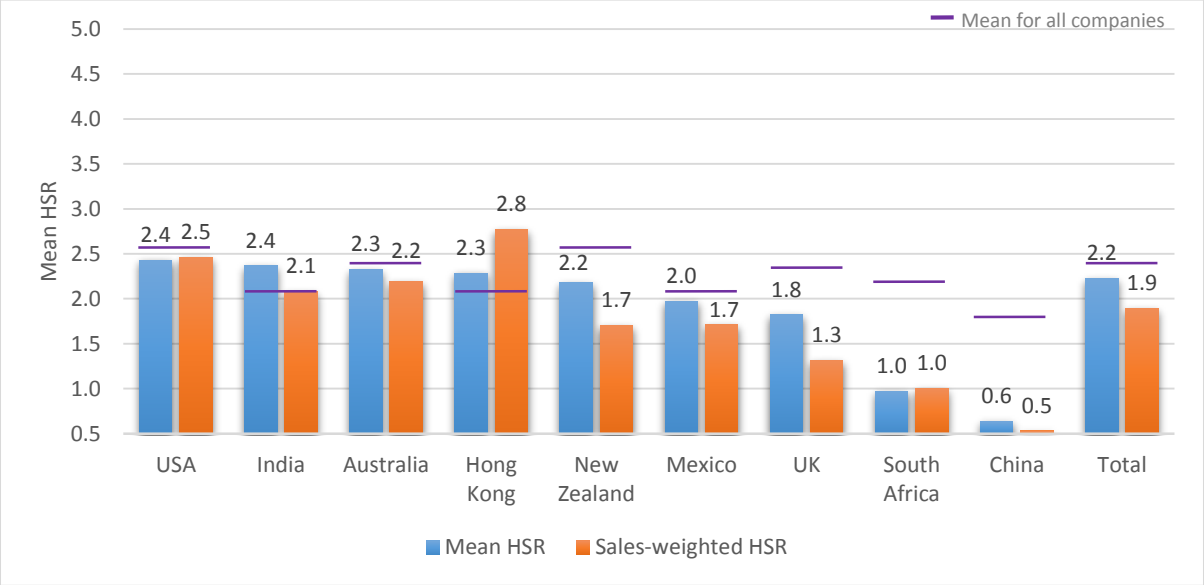
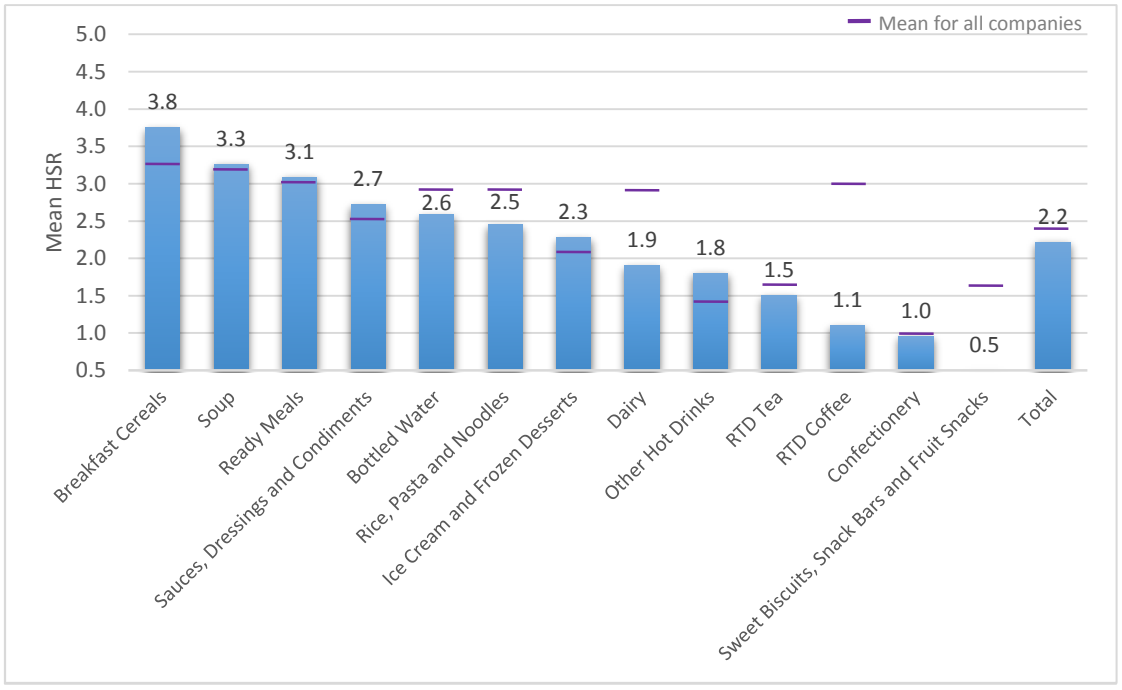


Figure 16.2 *Mean Health Star Rating by category for Nestlé products*



Nestlé had a relatively low overall mean HSR of 2.2 which decreased slightly to 1.9 when results were weighted by sales (Figure 16.1) illustrating that its products with slightly lower HSRs accounted for a relatively larger proportion of sales than those with higher HSRs. Out of the nine countries included in Nestlé's analysis, the USA and India had the highest mean HSR (2.4), with China having the lowest HSR of 0.6. However, country rankings changed once sales-weighting was applied, with Hong Kong having the highest sales-weighted mean HSR of 2.8, followed by the USA (2.5) and Australia (2.2). China's HSR dropped even lower to 0.5 when sales-weighting was applied. When results were examined by category (Figure

16.2), the highest mean HSR was seen in the 'Breakfast Cereal' category (3.8), followed by 'Soup' (3.3), with 'Sweet Biscuits, Snack Bars and Fruit Snacks' having the lowest mean HSR of all Nestlé product categories (0.5). China's low ranking is hence explained by the category rankings, with the only Nestlé products sold in China being those in the lowest-ranked 'Sweet Biscuits, Snack Bars and Fruit Snacks' category. The decrease in Nestlé's mean HSR when sales-weighting was applied is explained in part by the fact that the three highest ranked categories represented less in total sales than the 'Confectionery' category alone across the nine countries included in analysis.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Nestlé products considered "healthy" and sales-weighted proportion of Nestlé products considered "healthy"*

Figure 16.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Nestlé products*

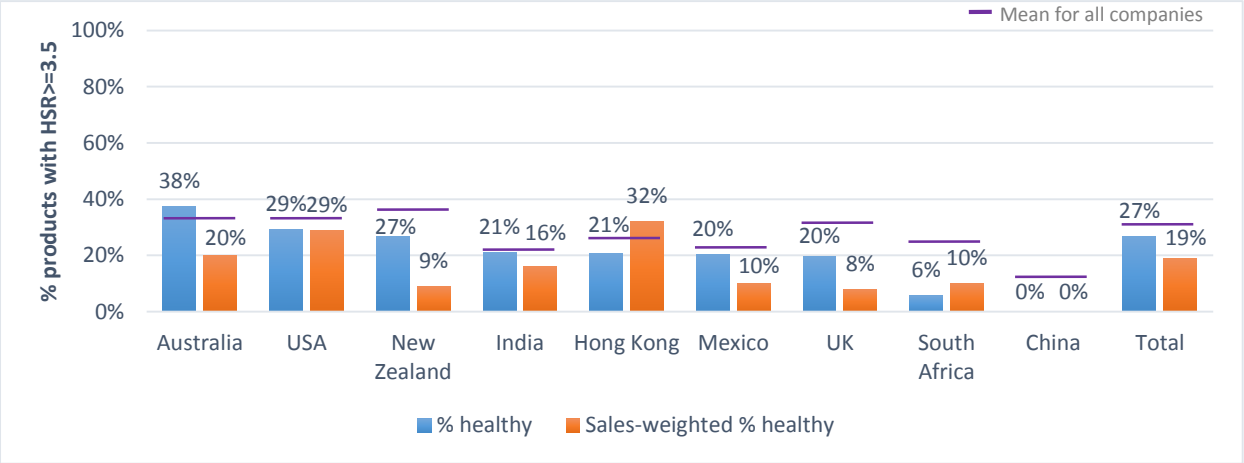
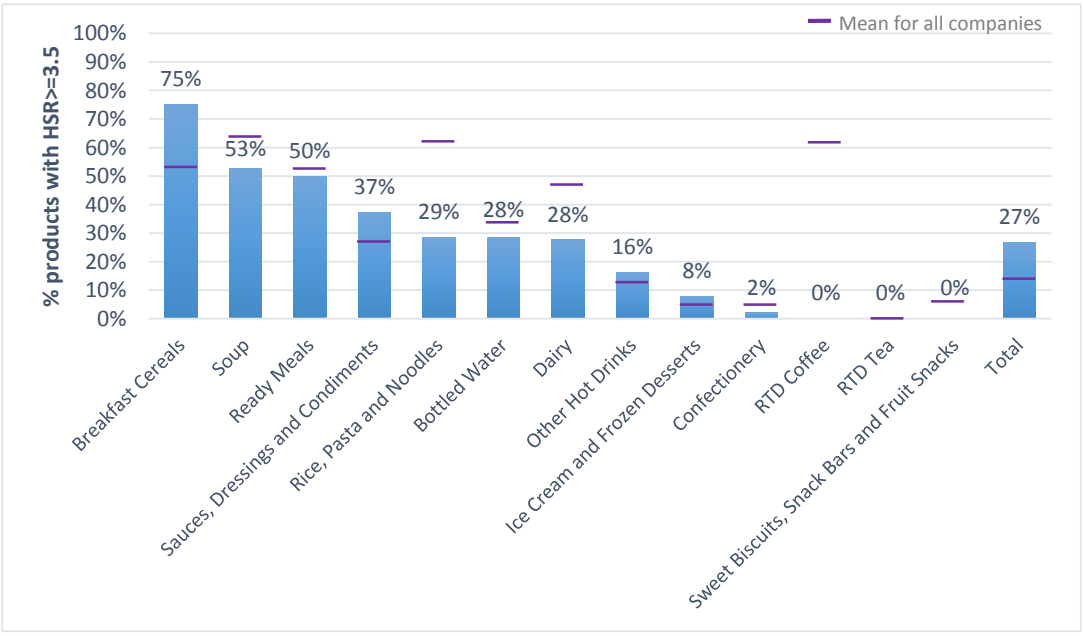


Figure 16.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Nestlé products*



Overall, Nestlé had a relatively low proportion of sales in all nine countries with an HSR of 3.5 or greater (27%), which decreased to 19% when results were weighted by sales (Figure 16.3) again illustrating that products of lower nutritional quality contributed more to annual 2016 sales than products of higher nutritional quality. Australia, the USA and New Zealand ranked highest in terms of the proportion of products receiving an HSR of >=3.5 (38%, 29% and 27% respectively) with China having zero products receiving an HSR>=3.5. However, when results were weighted by sales, Hong Kong ranked highest in terms of the country with the highest proportion of products considered 'healthy', with 32%. Similar trends were observed in the category analysis as were observed in the overall mean HSR analysis, with 'Breakfast Cereals' having the highest proportion of products with >=3.5 HSR, and 'Sweet Biscuits, Snack Bars and Fruit Snacks' the lowest. However, 'RTD Tea' and 'RTD Coffee' also had zero products with an HSR of >=3.5.

ANALYSIS 5 and 6: *Country and category rankings based upon proportion of Nestlé products meeting WHO Euro criteria*

Figure 16.5 *Proportions of Nestlé products meeting WHO Euro criteria for marketing to children – by Country*

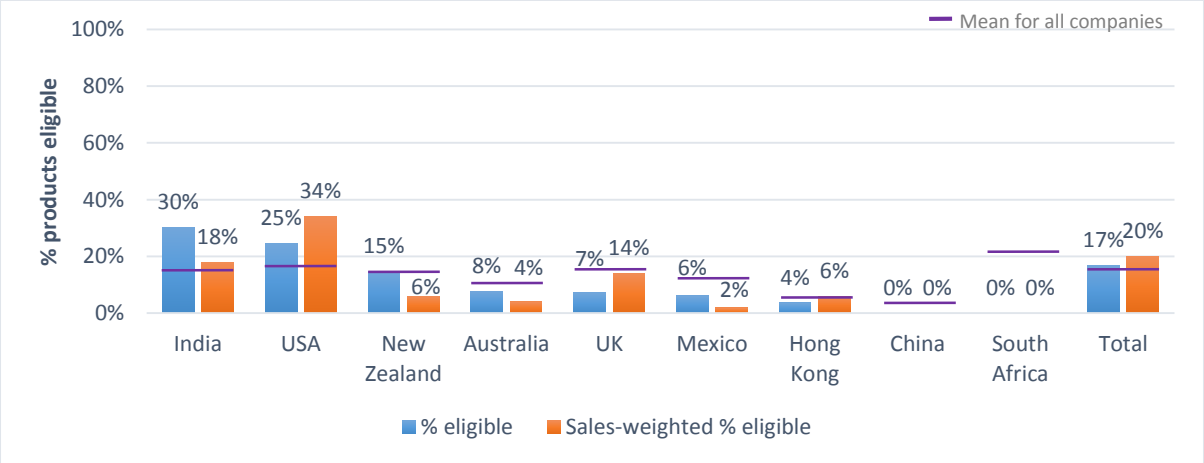
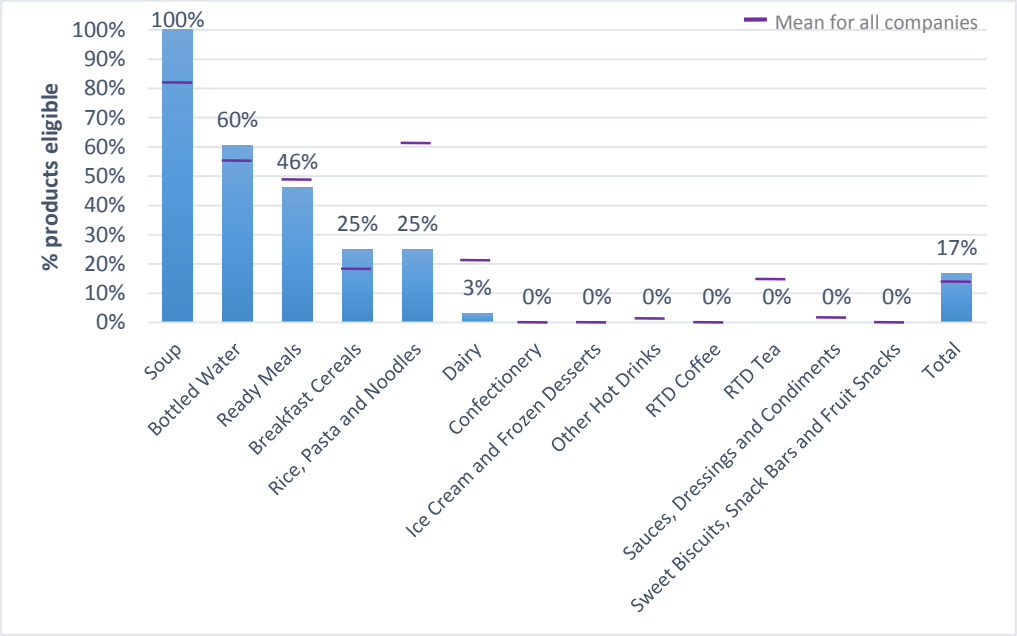


Figure 16.6 *Proportions of Nestlé products meeting WHO Euro criteria for marketing to children – by Category*



Overall a low proportion of Nestlé products (17%) were eligible for marketing to children under the WHO Euro criteria (Figure 16.5), increasing slightly to 19% when results were weighted by sales. India had the highest proportion of products eligible for marketing to children (30%) but was overtaken by the USA with 34% when results were weighted by sales. China and South Africa both had zero products eligible for marketing to children. The USA's high result can be explained by the fact that Nestlé's product range in the USA was made up of predominantly 'Ready Meals' which ranked highly in the category analysis (Figure 16.6). A large number of categories (7/13) did not have any products eligible for marketing to children in Nestlé's portfolio.

More specific results broken down by company and country for Nestlé can be seen in Appendix B.

COMPANY 17: PEPSICO

Products included

There were 1,882 identified products manufactured by PepsiCo in nine countries. There was sufficient nutrient information for 1,813 products to generate a Health Star Rating and for 1,839 to generate results for the WHO Euro analysis. There were 43 products (2%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 17.1 shows the breakdown of products in each category by country.

***Table 17.1** Number of PepsiCo products by country in Euromonitor categories*

	Bottled Water	Breakfast Cereals	Carbonates	Concentrates	Juices	Sauces, Dressings and Spreads	Savoury Snacks	Sports and Energy Drinks	Sweet Biscuits, Snack Bars and Fruit Snacks	**Total**	**% sales***
Australia	-	-	13	2	-	48	154	16	-	**233**	**100%**
China	-	14	24	-	6	-	89	6	-	**139**	**97%**
Hong Kong	-	33	9	-	7	-	30	4	-	**83**	**100%**
India	1	9	10	-	25	-	68	-	-	**113**	**99%**
Mexico	7	-	13	-	-	-	88	11	95	**214**	**96%**
New Zealand	-	-	19	1	-	-	102	8	37	**167**	**100%**
South Africa	-	-	9	-	-	-	61	-	-	**70**	**100%**
UK	-	63	19	-	69	-	83	7	-	**241**	**98%**
USA	21		104	-	161	-	252	84	-	**622**	**92%**
Total	**29**	**119**	**220**	**3**	**268**	**48**	**927**	**136**	**132**	**1,882**	**94%**

* Note that this value indicates % sales from included categories for each country

The nine countries used in this analysis represented 62% of PepsiCo total global food and beverage sales in 2016. Of these nine countries, the USA represented the highest revenue by far, with >$35 billion, and Hong Kong the lowest revenue with less than $100 million. Within each country, the included categories represented between 92% and 100% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the seven product categories included in analysis, 'Savoury Snacks' represented the largest amount of products and the highest sales value by far.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of PepsiCo products and sales-weighted mean nutrient profile of PepsiCo products*

***Figure 17.1** Mean Health Star Rating and sales-weighted mean Health Star Rating by country for PepsiCo products*

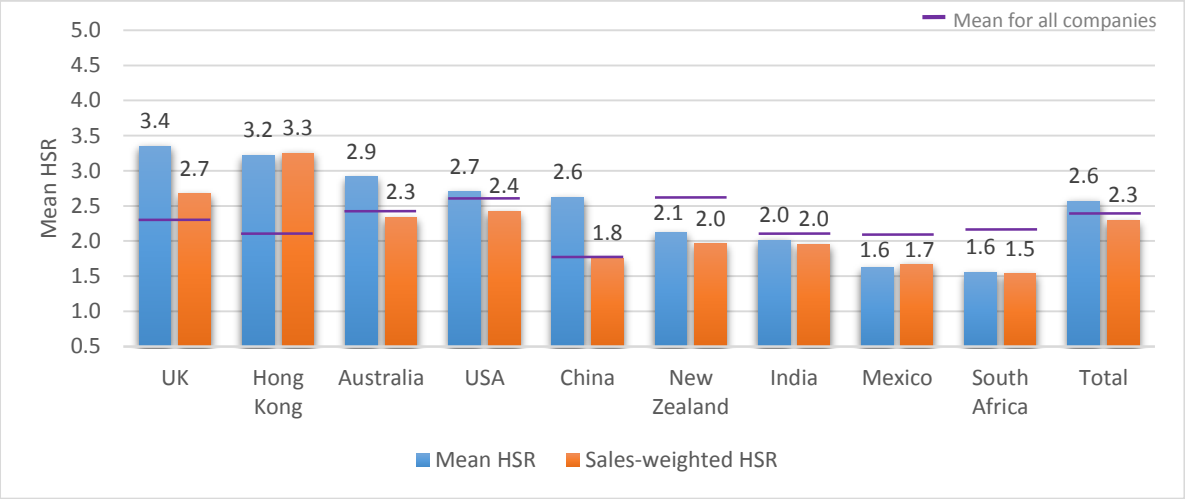
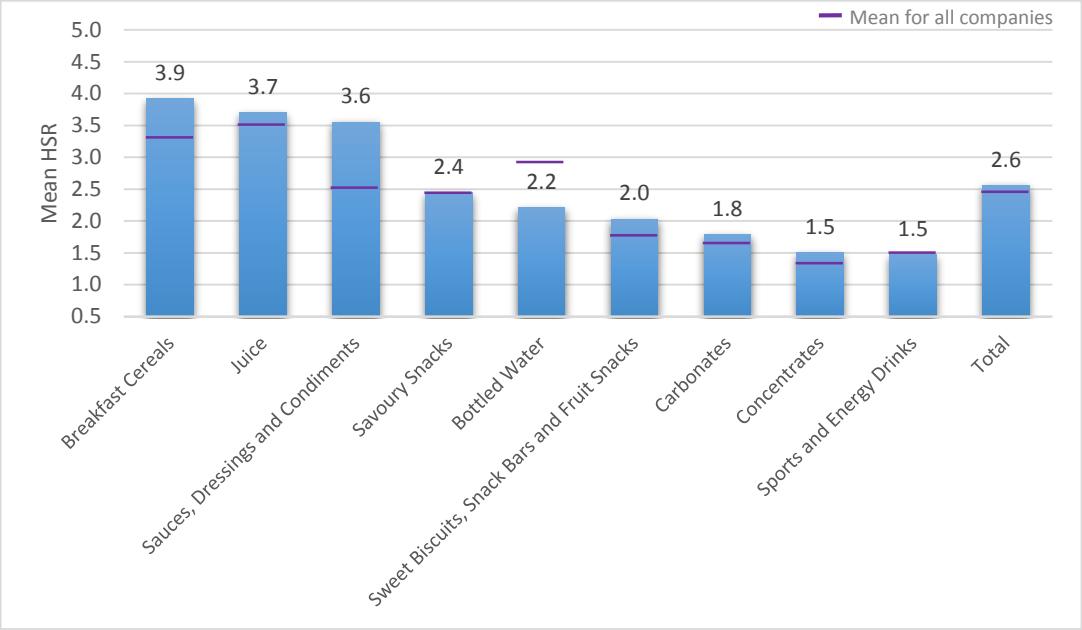


Figure 17.2 *Mean Health Star Rating by category for PepsiCo products*



PepsiCo had an overall mean HSR of 2.6 which decreased slightly to 2.3 when results were weighted by sales (Figure 17.1). Out of the nine countries included in PepsiCo's analysis, the UK had the highest mean HSR (3.4), followed by Hong Kong with a mean HSR of 3.2, with South Africa and Mexico having the lowest mean HSR of 1.6. However, when results were weighted by product sales, the rankings changed, with Hong Kong ranked first with a sales-weighted mean HSR of 3.3, followed by the UK with 2.7. South Africa remained in last place following sales-weighting. When results were examined by category (Figure 17.2), the highest mean HSR was seen in the 'Breakfast Cereal' category (3.9), followed by 'Juice' (3.7), with 'Concentrates' and 'Sports and Energy Drinks' having the lowest mean HSR of all PepsiCo product categories (1.5). Hong Kong and the UK's high rankings can be partly explained by the fact that they sold a larger number of breakfast cereal products than other countries. The decrease in mean HSR once sales-weighting was applied is explained in part due to the three highest ranked categories representing less than one quarter of the sales (<$5 billion) than the bottom-ranked three countries representing in 2016 (>$20 billion).

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of PepsiCo products considered "healthy" and sales-weighted proportion of PepsiCo products considered "healthy"*

Figure 17.3 *Proportion of products considered "healthy" using the Health Star Rating by country for PepsiCo products*

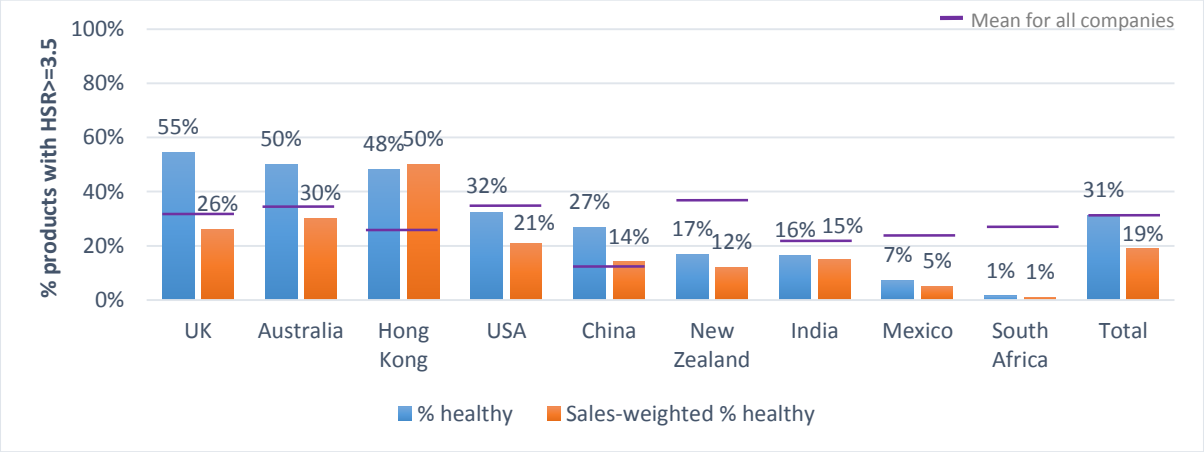
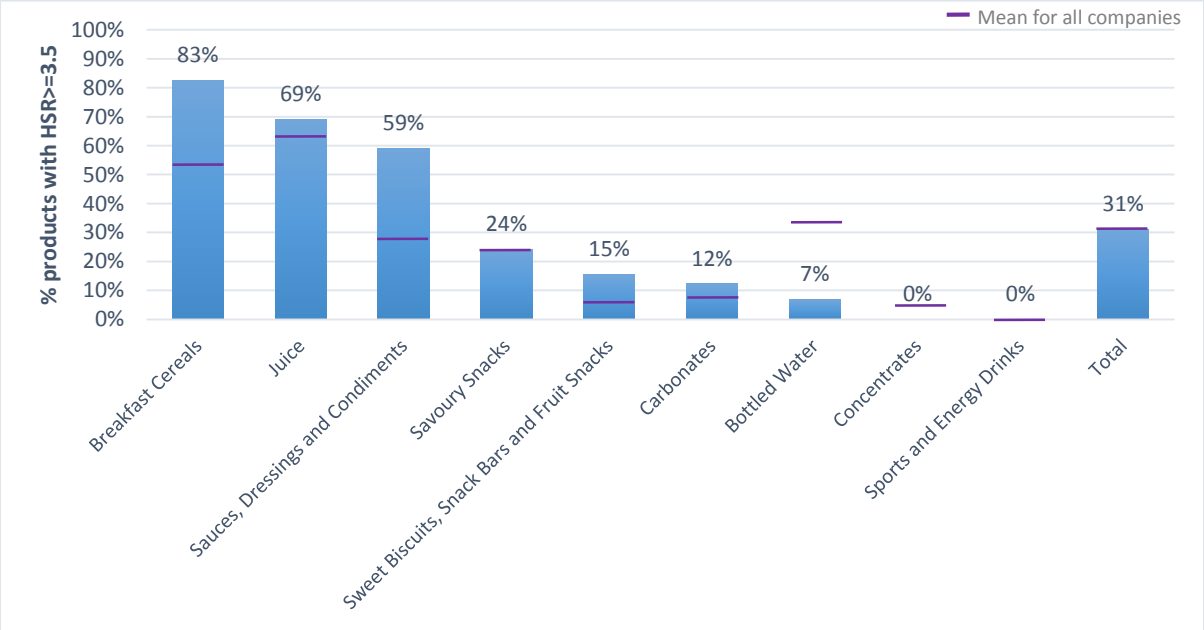


Figure 17.4 *Proportion of products considered "healthy" using the Health Star Rating by category for PepsiCo products*



Overall, PepsiCo had just under a third of products across all nine countries with an HSR of 3.5 or greater (31%), however that proportion dropped substantially to 19% when results were weighted by sales (Figure 17.3) again illustrating that products of lower nutritional quality contributed more to annual 2016 sales than products of higher nutritional quality. Similar results to the overall mean HSR were seen with the proportion of products receiving an HSR of >=3.5 in that prior to sales-weighting being applied, the UK ranked first with 55% of products considered "healthy". Once sales-weighting was applied, Hong Kong ranked first with 50% of products and the UK dropping to 26%. Only 1% of products from South Africa received an HSR of 3.5 or above. Just as with the mean overall HSR analysis, Hong Kong and the UK's high rankings can be partly explained by the fact that they sold a larger number of breakfast cereal products than other countries included in the analysis.

ANALYSIS 5 and 6: *Country and category rankings based upon proportion of PepsiCo products meeting WHO Euro criteria*

Figure 17.5 *Proportions of PepsiCo products meeting WHO Euro criteria for marketing to children – by Country*

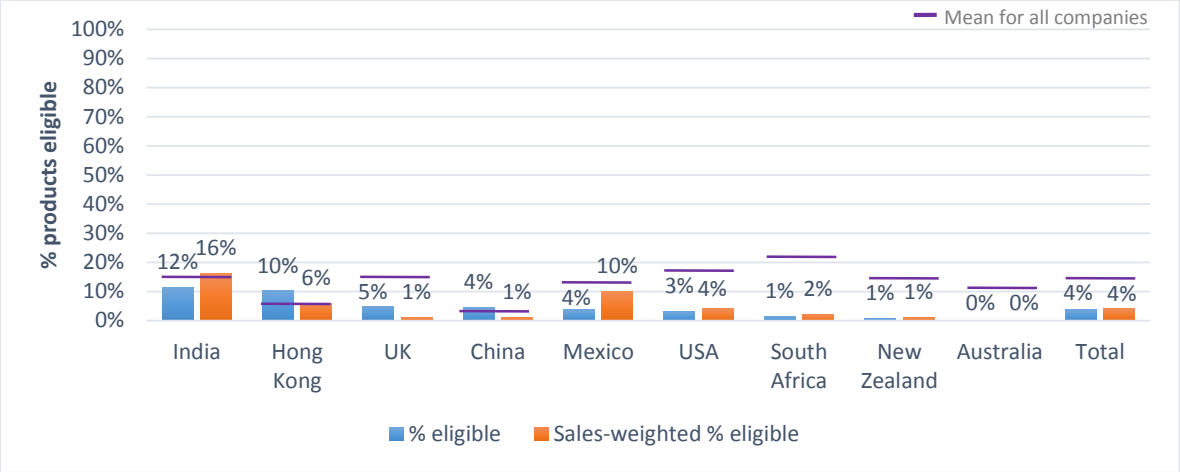
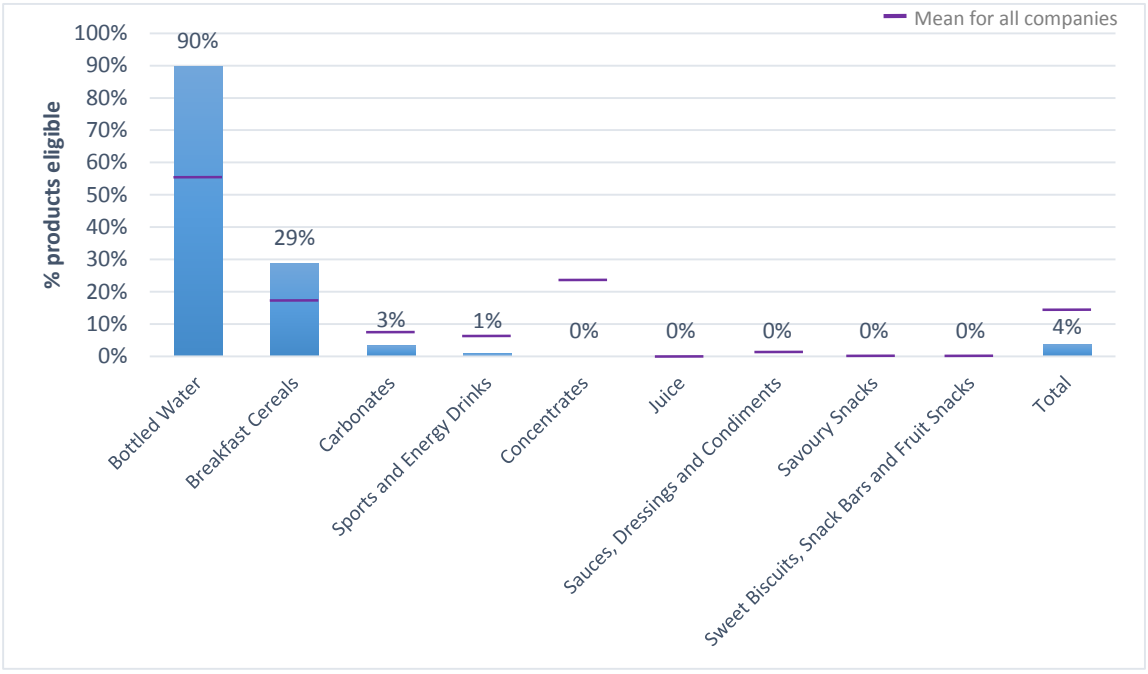


Figure 17.6 *Proportions of PepsiCo products meeting WHO Euro criteria for marketing to children – by Category*



Overall a very low proportion of PepsiCo products (4%) were eligible for marketing to children (Figure 17.5). India had the highest proportion of products eligible for marketing to children both before and after sales-weighting was applied (12% and 16% respectively), with Australia the only country selling zero products that were eligible for marketing to children. These results paint a different picture to when using the HSR as a marker for healthiness, mainly due to the fact that the WHO Euro criteria exclude whole categories whereas the HSR is based on nutrient cut-offs. 'Bottled Water' was the only category to have a high proportion of products eligible for marketing to children (90%).

More specific results broken down by company and country for PepsiCo can be seen in Appendix B.

COMPANY 18: FRIESLANDCAMPINA

Products included

There were 24 identified products manufactured by FrieslandCampina in two countries. There was sufficient nutrient information for 24 products to generate a Health Star Rating and for 24 to generate results for the WHO Euro analysis. Table 18.1 shows the breakdown of products in each category by country.

Table 18.1 *Number of FrieslandCampina products by country in Euromonitor categories*

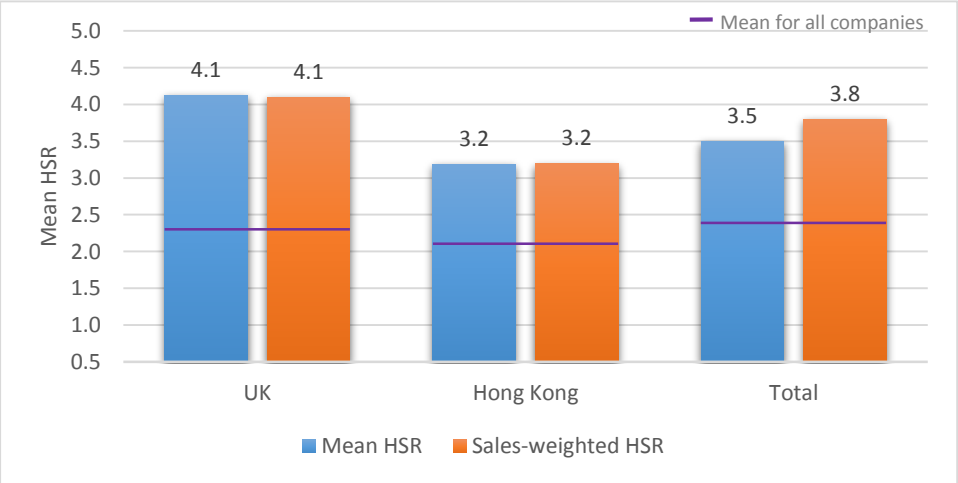
	Dairy	Total	% sales*
Hong Kong	16	**16**	**100%**
UK	8	**8**	**100%**
Total	**24**	**24**	**100%**

* Note that this value indicates % sales from included categories for each country

The two countries used in this analysis represented only 2% of FrieslandCampina's total global food and beverage sales in 2016. FrieslandCampina's main markets (in Europe) were not able to be included in the current analysis. Within each country, the included category represented 100% of product sales, however it is unknown whether we have captured every product for sale in every country.

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

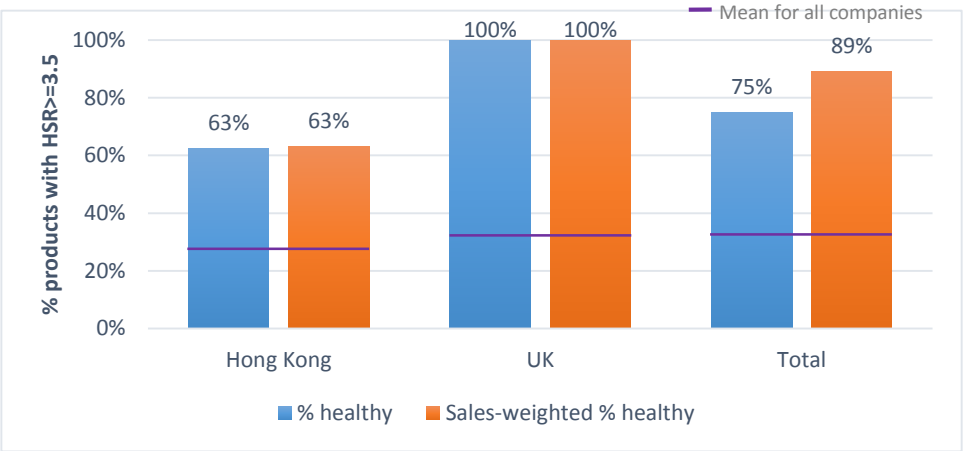
Figure 18.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for FrieslandCampina products*



FrieslandCampina had a relatively high overall mean HSR of 3.5 which increased slightly to 3.8 when results were weighted by sales (Figure 18.1) illustrating that its products with slightly higher HSRs account for a relatively larger proportion of sales than those with lower HSRs. Out of the two countries included in FrieslandCampina's analysis, the UK had a higher mean HSR both before and after results were weighted by sales (4.1), than Hong Kong with an HSR of 3.2. FrieslandCampina sold products in only one Euromonitor category ('Dairy') and so results are not shown by category.

ANALYSIS 3 and 4: *Country rankings based upon proportion of FrieslandCampina products considered "healthy" and sales-weighted proportion of products considered "healthy"*

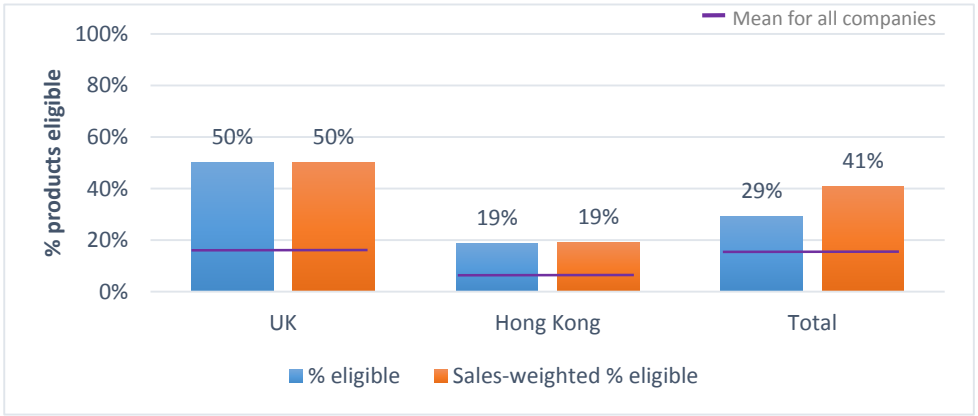
Figure 18.2 *Proportion of products considered "healthy" using the Health Star Rating by country for FrieslandCampina products*



Overall, FrieslandCampina had a relatively high proportion of products across the two countries with an HSR of 3.5 or greater (75%), which increased substantially to 89% when results were weighted by sales (Figure 18.2) showing that products of higher nutritional quality contributed more to annual 2016 sales than products of lower nutritional quality. 100% of UK products received an HSR of >=3.5 and Hong Kong 63%.

ANALYSIS 5 and 6: *Country rankings based upon proportion of FrieslandCampina products meeting WHO Euro criteria*

Figure 18.3 *Proportions of FrieslandCampina products meeting WHO Euro criteria for marketing to children – by Country*



Results for FrieslandCampina did not look as favourable when using the WHO Euro criteria compared to the HSR criteria, with only 29% of products eligible for marketing to children. However, once sales-weighting was applied this proportion increased substantially to 41%. The UK had 50% of products eligible and Hong Kong had 19%.

More specific results broken down by company and country for FrieslandCampina can be seen in Appendix B.

COMPANY 19: SUNTORY

Products included

There were 523 identified products manufactured by Suntory in six countries. There was sufficient nutrient information for 503 products to generate a Health Star Rating and for 514 to generate results for the WHO Euro analysis. There were five products (<1%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 19.1 shows the breakdown of products in each category by country.

Table 19.1 *Number of Suntory products by country in Euromonitor categories*

	Australia	China	Hong Kong	New Zealand	South Africa	UK	**Total**
Bottled Water	9	-	-	15	-	-	**24**
Carbonates	-	-	4	-	-	5	**9**
Concentrates	7	-	4	16	-	11	**38**
Dairy	9	-	-	-	-	-	**9**
Ice Cream and Frozen Desserts	-	-	-	-	-	2	**2**
Juice	-	2	5	139	-	25	**171**
RTD Coffee	-	2	-	-	-	-	**2**
RTD Tea	-	3	-	-	-	-	**3**
Sauces, Dressings and Condiments	93	-	-	57	-	-	**150**
Sports and Energy Drinks	27	-	9	29	12	38	**115**
Total	**145**	**7**	**22**	**256**	**12**	**81**	**523**
% sales*	**94%**	**92%**	**100%**	**82%**	**100%**	**100%**	**96%**

* Note that this value indicates % sales from included categories for each country

The six countries used in this analysis represented 15% of Suntory total global food and beverage sales in 2016. Of these six countries, the UK represented the highest revenue, with >$1 billion, and South Africa the lowest revenue with less than $20 million. Within each country, the included categories represented between 82% and 100% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the 10 product categories included in analysis, 'Sports and Energy Drinks' represented the highest sales value.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Suntory products and sales-weighted mean nutrient profile of Suntory products*

Figure 19.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Suntory products*

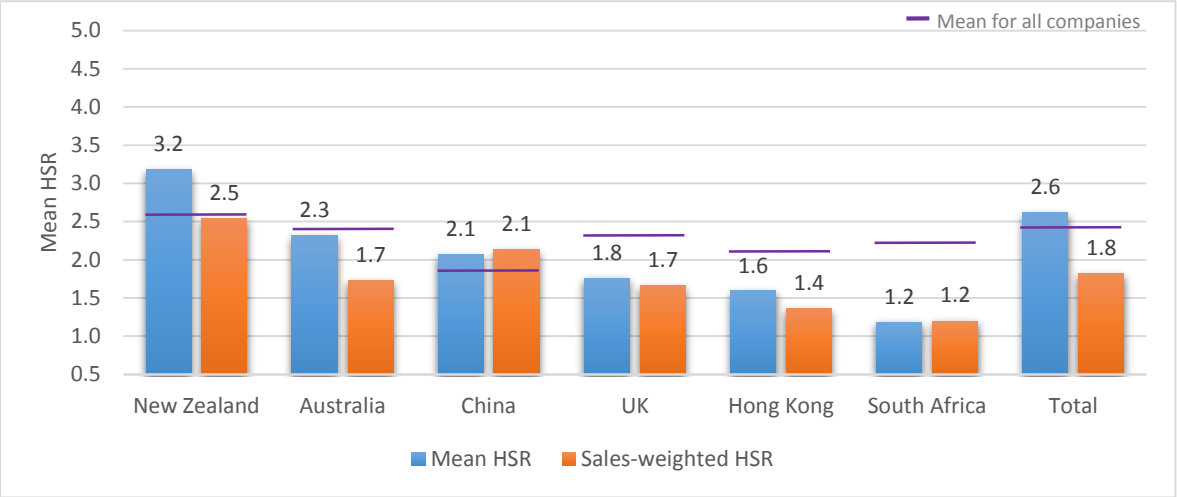
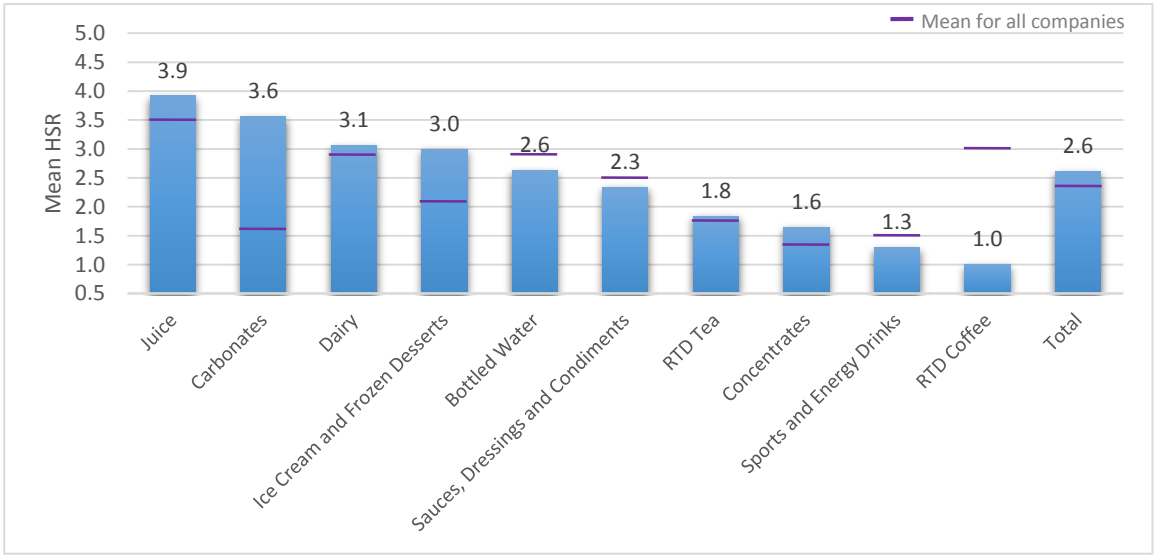


Figure 19.2 *Mean Health Star Rating by category for Suntory products*



Suntory had an overall mean HSR of 2.6 which decreased substantially to 1.8 when results were weighted by sales (Figure 19.1) illustrating that its products with lower HSRs accounted for a relatively larger proportion of sales than those with higher HSRs. Out of the six countries included in Suntory's analysis, New Zealand had the highest mean HSR both before and after results were weighted by sales (3.2 and 2.5 respectively), with South Africa having the lowest mean HSR of 1.2. Interestingly, Australia ranked second before sales-weighting was applied but dropped to equal third following sales-weighting. When results were examined by category (Figure 19.2), the highest mean HSR was seen in the 'Juice' category (3.9), followed by 'Carbonates' (3.6), with 'RTD Coffee' having the lowest mean HSR (1.0). Note that the 'Carbonates' category includes sparkling juices, which are responsible for the higher ranking of this product category due to the fruit content of sparkling juice products. New Zealand also had the highest number of juice products included in analysis, which explains its number one ranking out of all the countries included.

The decrease in mean HSR overall once sales-weighting was applied is explained in part by the fact that the three highest-ranked categories represented <$400 million in sales in 2016 across the six countries, whereas the bottom-ranked three represented more than $1 billion.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Suntory products considered "healthy" and sales-weighted proportion of Suntory products considered "healthy"*

Figure 19.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Suntory products*

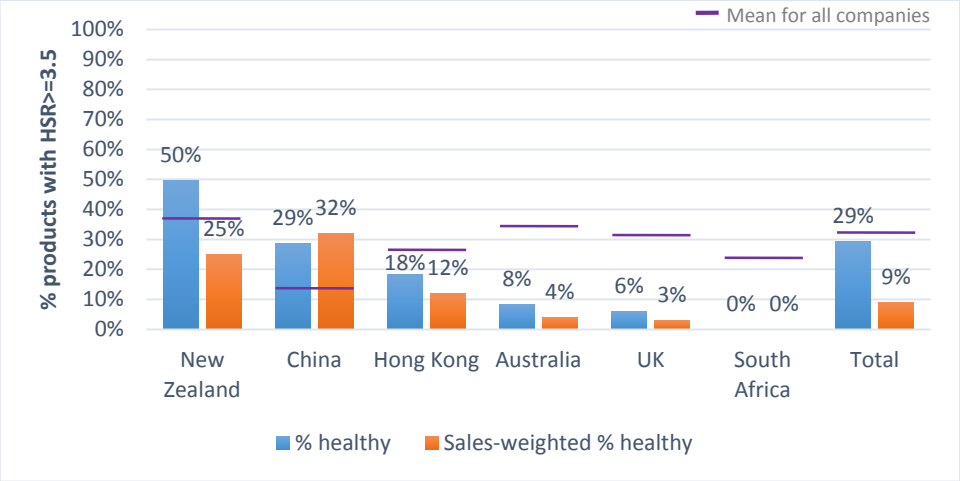
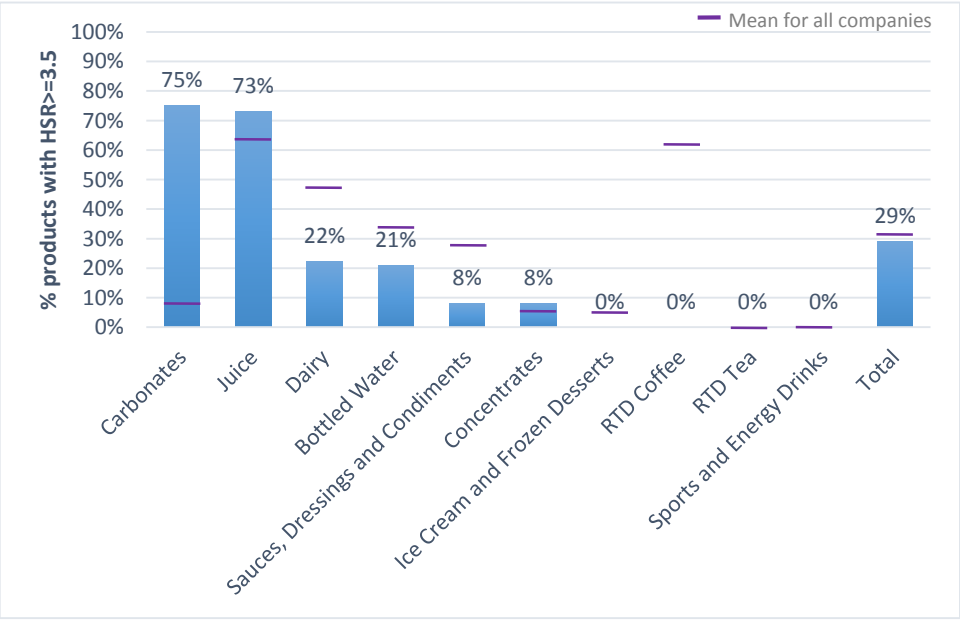


Figure 19.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Suntory products*



Overall, just under a third (29%) of Suntory products had an HSR of 3.5 or greater, which decreased substantially to 9% when results were weighted by sales (Figure 19.3) again illustrating that products of lower nutritional quality contributed more to annual 2016 sales than products of higher nutritional quality.

Before sales-weighting was applied, New Zealand had the largest proportion of products with an HSR of >=3.5 (50%), followed by China with 29%. However, these rankings were reversed following sales weighting, with China having 7% higher sales from "healthy" products compared to New Zealand. Once again 'Carbonates' and 'Juice' were at the top of the rankings, with 'Sports and Energy Drinks' at the bottom.

ANALYSIS 5 and 6: *Country and category rankings based upon proportion of Suntory products meeting WHO Euro criteria*

Figure 19.5 *Proportions of Suntory products meeting WHO Euro criteria for marketing to children – by Country*

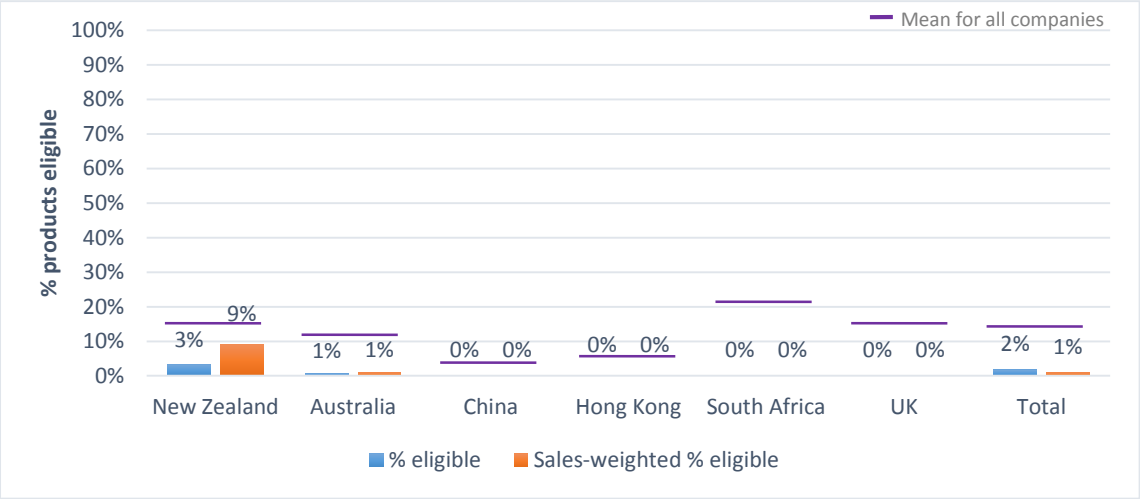
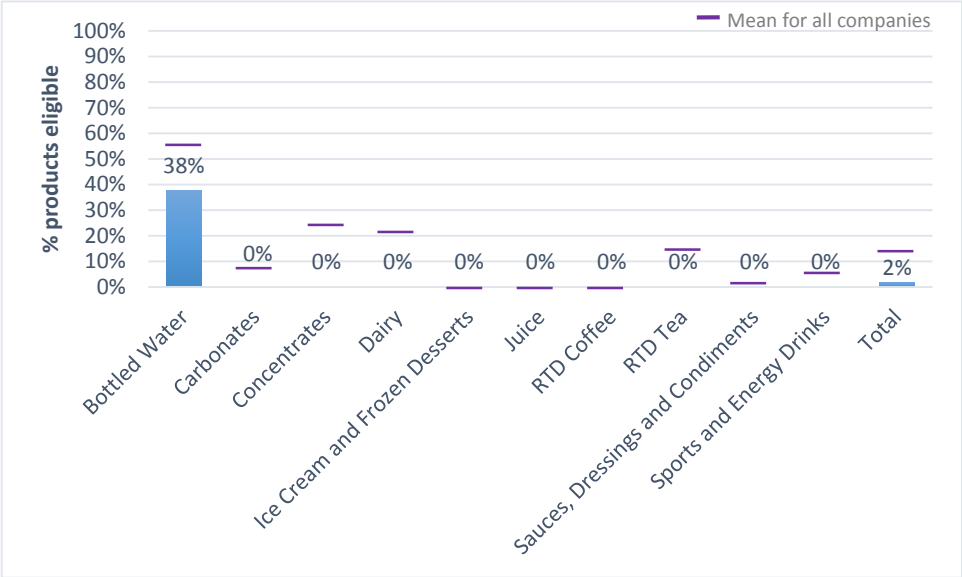


Figure 19.6 *Proportions of Suntory products meeting WHO Euro criteria for marketing to children – by Category*



Overall a very low proportion of Suntory products (2%) were eligible for marketing to children (Figure 19.5), decreasing to 1% when results were weighted by sales. New Zealand and Australia were the only countries with products eligible for marketing to children, with New Zealand having more products than

Australia. These results were driven purely by the 'Bottled Water' category as this was the only category to have products eligible for marketing to children.

More specific results broken down by company and country for Suntory can be seen in Appendix B.

COMPANY 20: TINGYI

Products included

There were 158 identified products manufactured by Tingyi in one country. There was sufficient nutrient information for 137 products to generate a Health Star Rating and for 137 to generate results for the WHO Euro analysis. There were 21 products (13%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 20.1 shows the breakdown of products in each category by country.

Table 20.1 *Number of Tingyi products by country in Euromonitor categories*

	Bottled Water	Dairy	Juice	RTD Tea	Rice, Pasta and Noodles	**Total**	**% sales***
China	3	18	37	28	72	**158**	**98%**
Total	**3**	**18**	**37**	**28**	**72**	**158**	**98%**

* Note that this value indicates % sales from included categories for each country

The one country (China) used in this analysis represented 98% of Tingyi total global food and beverage sales in 2016. The included categories represented 98% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the five product categories included in analysis, 'Rice, Pasta and Noodles represented the highest sales value.

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

Figure 20.1 *Mean Health Star Rating by country for Tingyi products*

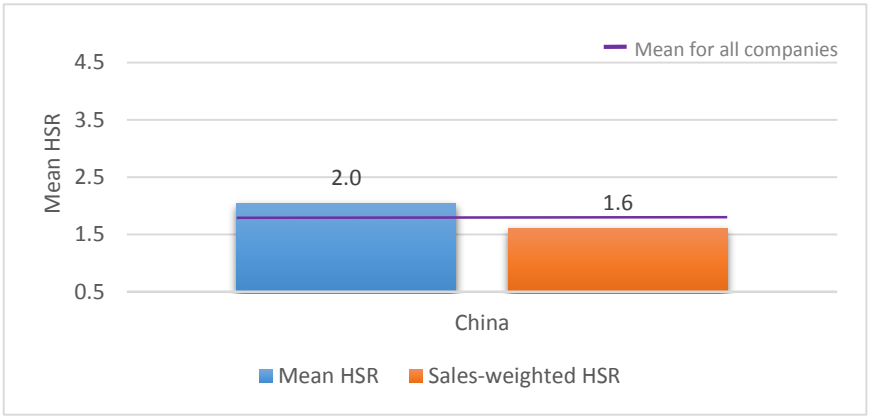
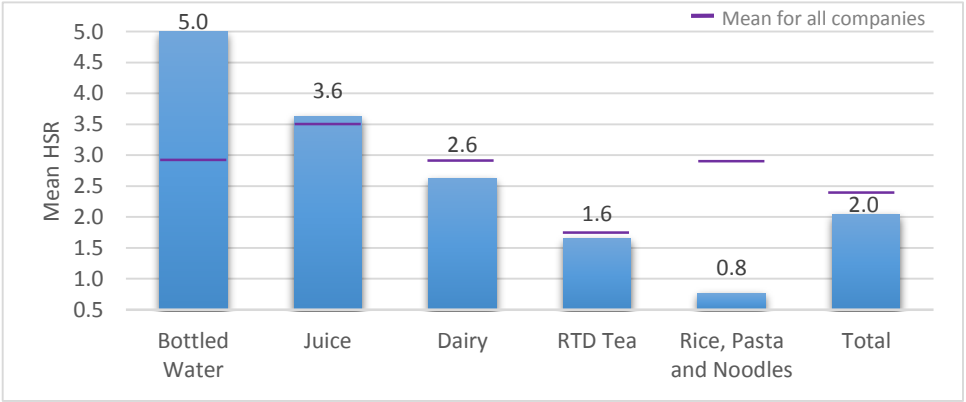


Figure 20.2 *Mean Health Star Rating by category for Tingyi products*



Tingyi had an overall mean HSR of 2.0 which decreased to 1.6 when results were weighted by sales (Figure 20.1) illustrating that its products with lower HSRs accounted for a relatively larger proportion of sales than those with higher HSRs. China was the only country included in Tingyi's analysis. When examining results by category, 'Bottled Water' had the highest mean HSR of 5.0, followed by 'Juice' with 3.6 and 'Dairy' with 2.6 (Figure 20.2). The decrease in Tingyi's overall mean HSR when sales-weighting was applied is explained in part by the fact that the top three ranked categories represented less than half the 2016 sales that the lowest ranked category alone represented.

ANALYSIS 3 and 4: *Category rankings based upon proportion of Tingyi products considered "healthy" and sales-weighted proportion of Tingyi products considered "healthy"*

Figure 20.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Tingyi products*

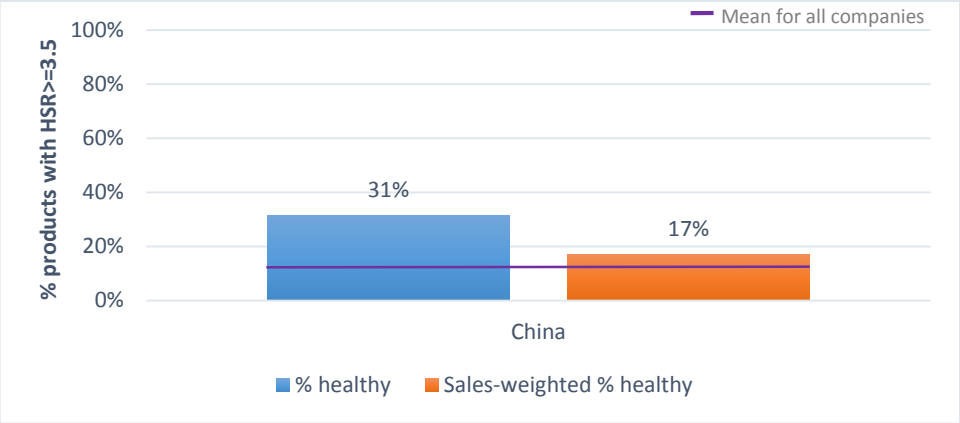
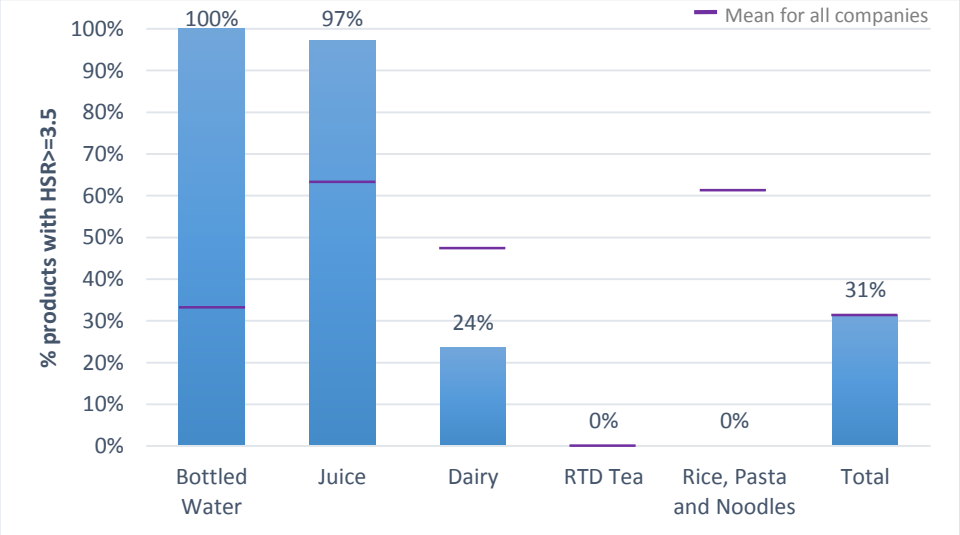


Figure 20.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Tingyi products*



Just under a third of Tingyi products were considered "healthy" with an HSR of >=3.5 (Figure 20.3), however this proportion dropped by almost half to 17% when sales-weighting was applied. Once again, 'Bottled Water' and 'Juice' products had the highest proportion of products with an HSR of >=3.5 (Figure 20.4).

ANALYSIS 5 and 6: *Category rankings based upon proportion of Tingyi products meeting WHO Euro criteria*

Figure 20.5 *Proportions of Tingyi products meeting WHO Euro criteria for marketing to children – by Country*

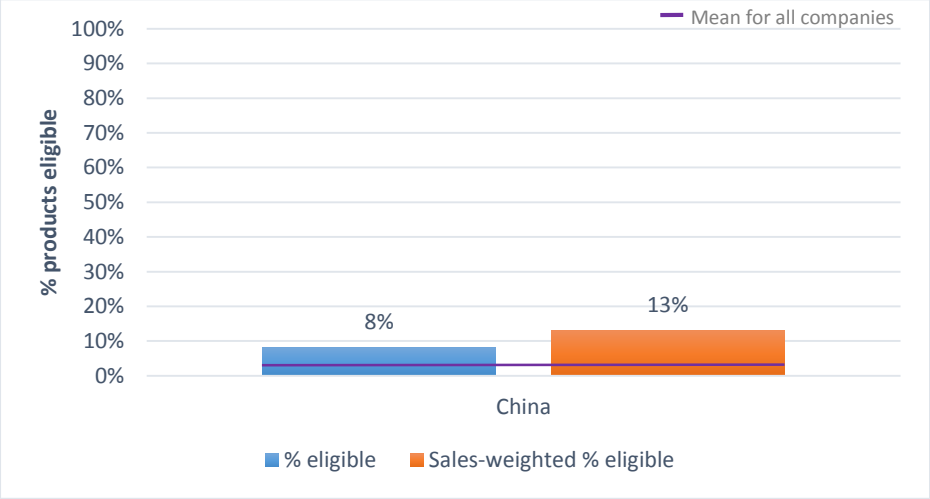
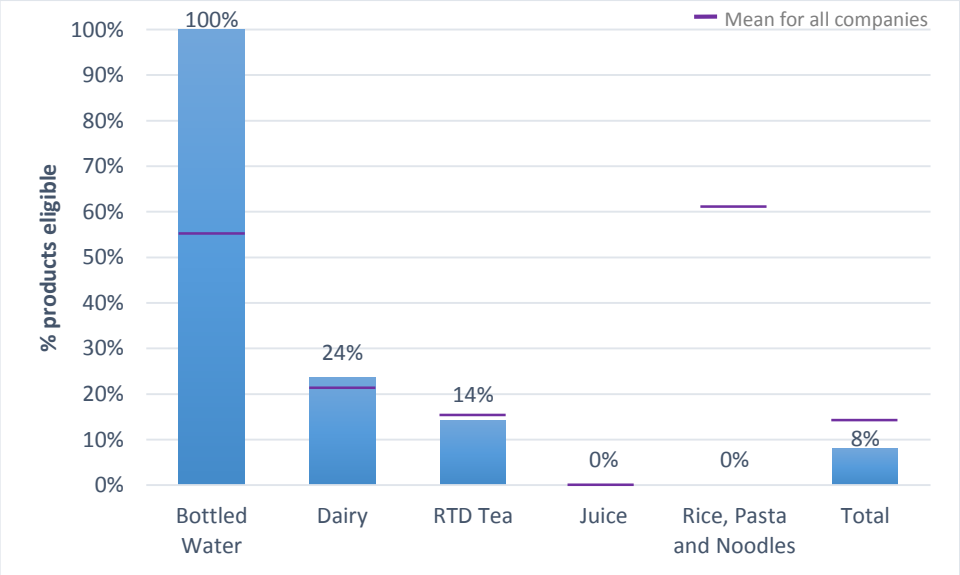


Figure 20.6 *Proportions of Tingyi products meeting WHO Euro criteria for marketing to children – by Category*



The opposite trend was seen when assessing products using the WHO Euro criteria versus the HSR in that the proportion of products eligible for marketing to children actually increased following sales weighting of results from 8-13% (Figure 20.5). 100% of 'Bottled Water' products were eligible for marketing to children followed by 24% of 'Dairy' products. 'Juice' products are ineligible for marketing to children under the WHO Euro criteria.

More specific results broken down by company and country for Tingyi can be seen in Appendix B.

COMPANY 21: UNILEVER

Products included

There were 1,680 identified products manufactured by Unilever in nine countries. There was sufficient nutrient information for 1,653 products to generate a Health Star Rating and for 1,673 to generate results for the WHO Euro analysis. There were seven products (<1%) with insufficient nutrient information to calculate either a HSR or a WHO Euro result. Table 21.1 shows the breakdown of products in each category by country.

Table 21.1 *Number of Unilever products by country in Euromonitor categories*

	Australia	China	Hong Kong	India	Mexico	NZ	South Africa	UK	USA	**Total**
Concentrates	-	-	-	7	-	-	-	-	-	**7**
Dairy	18	-	3	-	12	18	29	24	28	**132**
Ice Cream and Frozen Desserts	84	62	-	56	15	100	51	111	318	**797**
Processed Meat and Seafood	-	-	-	-	-	-	8	-	-	**8**
RTD Tea	16	12	-	-	5	-	-	-	42	**75**
Ready Meals	-	-	9	-	-	-	-	-	49	**58**
Rice, Pasta and Noodles	-	-	-	-	-	-	-	20	-	**20**
Sauces, Dressings and Condiments	37	10	20	15	4	38	47	114	58	**343**
Soup	54	16	-	22	20	54	64	-	-	**230**
Spreads	-	-	-	7	-	-	-	3	-	**10**
Total	**209**	**100**	**32**	**107**	**56**	**210**	**199**	**272**	**495**	**1,680**
% sales*	**87%**	**89%**	**72%**	**30%**	**94%**	**83%**	**71%**	**84%**	**91%**	**85%**

* Note that this value indicates % sales from included categories for each country

The nine countries used in this analysis represented only 35% of Unilever total global food and beverage sales in 2016, with many European countries that represent a large share of the market not included in our analysis. Of the nine countries included, the USA represented the highest revenue, with >$7 billion, and Hong Kong the lowest revenue with less than $60 million. Within each country, the included categories represented between 30% and 94% of product sales, however it is unknown whether we have captured every product for sale in every country. Of the 10 product categories included in analysis, 'Ice Cream and Frozen Desserts represented the highest sales value and the largest number of products.

ANALYSIS 1 and 2: *Country and category rankings based upon mean nutrient profile of Unilever products and sales-weighted mean nutrient profile of Unilever products*

Figure 21.1 *Mean Health Star Rating and sales-weighted mean Health Star Rating by country for Unilever products*

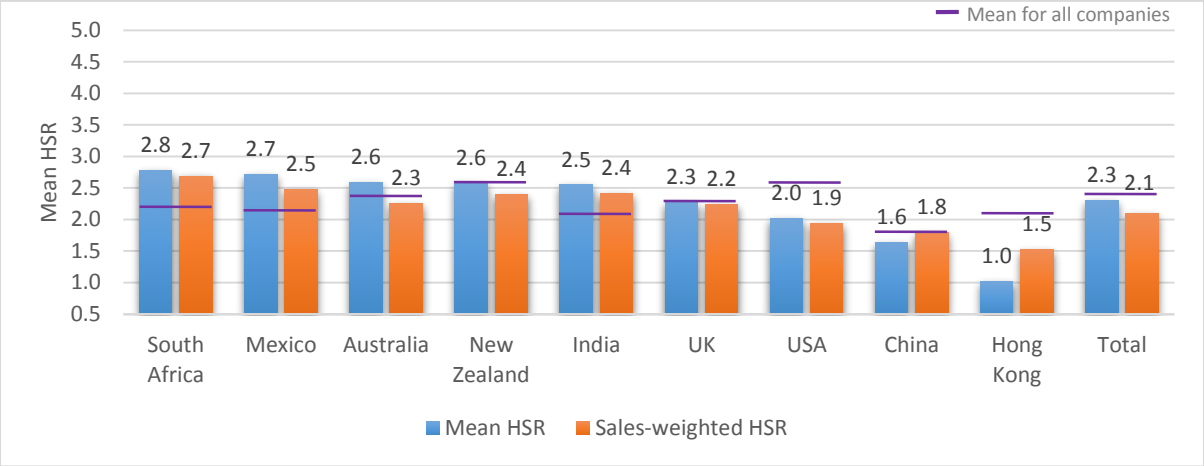
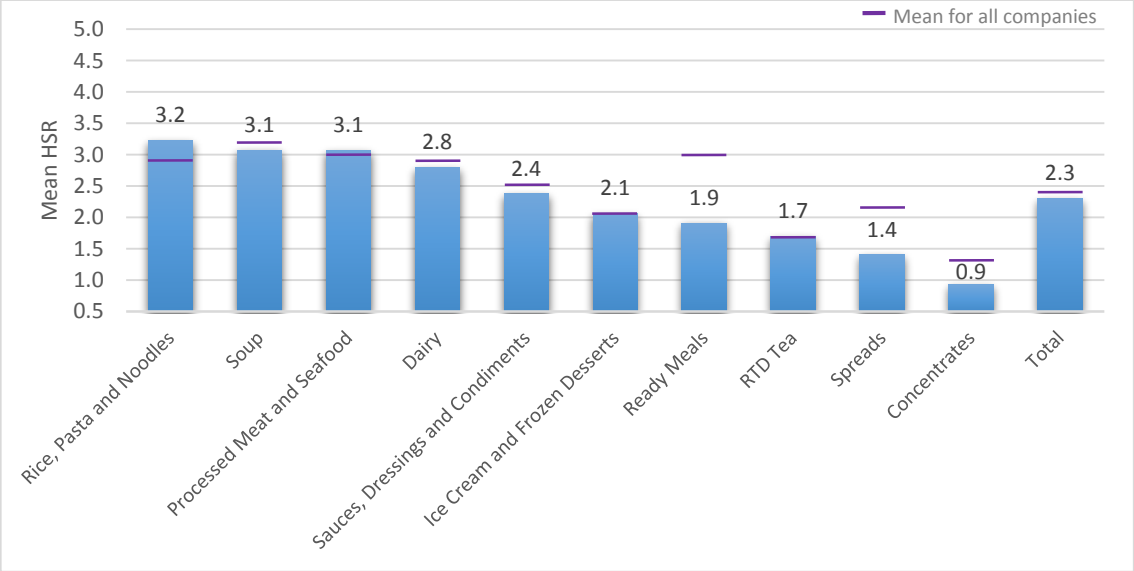


Figure 21.2 *Mean Health Star Rating by category for Unilever products*



Unilever had an overall mean HSR of 2.3 which decreased slightly to 2.1 when results were weighted by sales (Figure 21.1) indicating that its products with slightly lower HSRs account for a relatively larger proportion of sales than those with slightly higher HSRs. Out of the nine countries included in Unilever's analysis, South Africa had the highest mean HSR both before and after results were weighted by sales (2.8 and 2.7 respectively), followed by Mexico (2.7 and 2.5 respectively), with China and Hong Kong having the lowest HSRs. South Africa's high ranking can be explained in part by the types of products evaluated, as seen in Figure 21.2. South Africa had a larger number of products in product categories such as 'Soup' and 'Processed Meat and Seafood' compared to other countries, and these categories ranked well in terms of overall mean HSR. 'Concentrates' had the lowest mean HSR of all product categories. The decrease in Unilever's overall mean HSR when sales-weighting was applied is explained in part by the fact that the top three ranked categories represented <$500 million of 2016 sales across the nine countries whereas the lowest-ranked three categories represented more than $2 billion combined.

ANALYSIS 3 and 4: *Country and category rankings based upon proportion of Unilever products considered "healthy" and sales-weighted proportion of Unilever products considered "healthy"*

Figure 21.3 *Proportion of products considered "healthy" using the Health Star Rating by country for Unilever products*

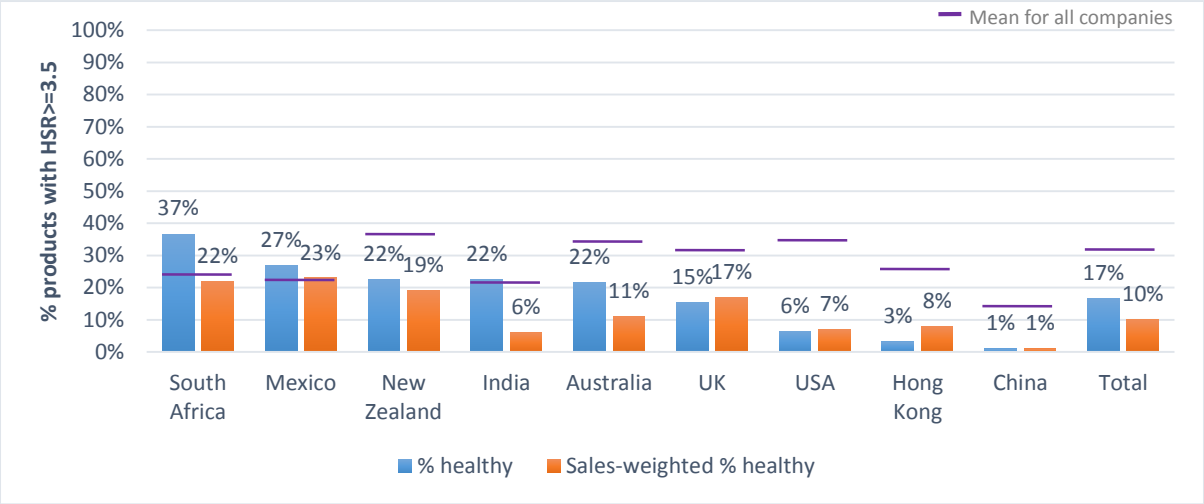
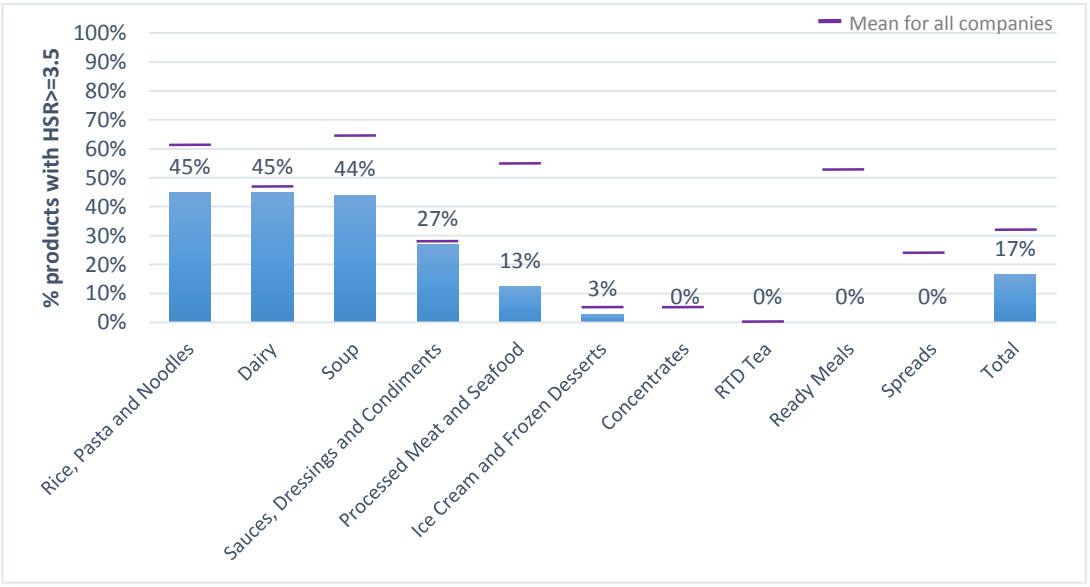


Figure 21.4 *Proportion of products considered "healthy" using the Health Star Rating by category for Unilever products*



Overall, Unilever had a relatively low proportion of products across all nine countries with an HSR of 3.5 or greater (17%), which decreased to only 10% when results were weighted by sales (Figure 21.3) again illustrating that products of lower nutritional quality contributed more to annual 2016 sales than products of higher nutritional quality. Similar country rankings were observed to the overall mean HSR analysis, with South Africa and Mexico ranked first and second respectively. Only 1% of products in China received an HSR of 3.5 or above. When examining results by category, 'Rice, Pasta and Noodles' and 'Dairy' both had

45% of products receiving an HSR of >=3.5, followed closely by 'Soup' with 44%. Zero products in the 'Concentrates', 'RTD Tea', 'Ready Meals' and 'Spreads' categories received an HSR of 3.5 or greater.

ANALYSIS 5 and 6: *Country and category rankings based upon proportion of Unilever products meeting WHO Euro criteria*

Figure 21.5 *Proportions of Unilever products meeting WHO Euro criteria for marketing to children – by Country*

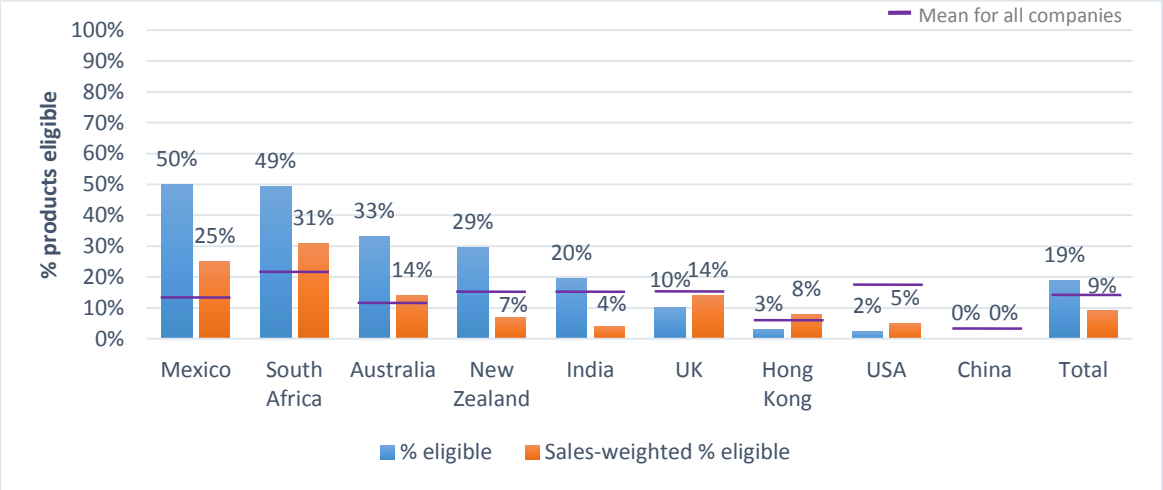
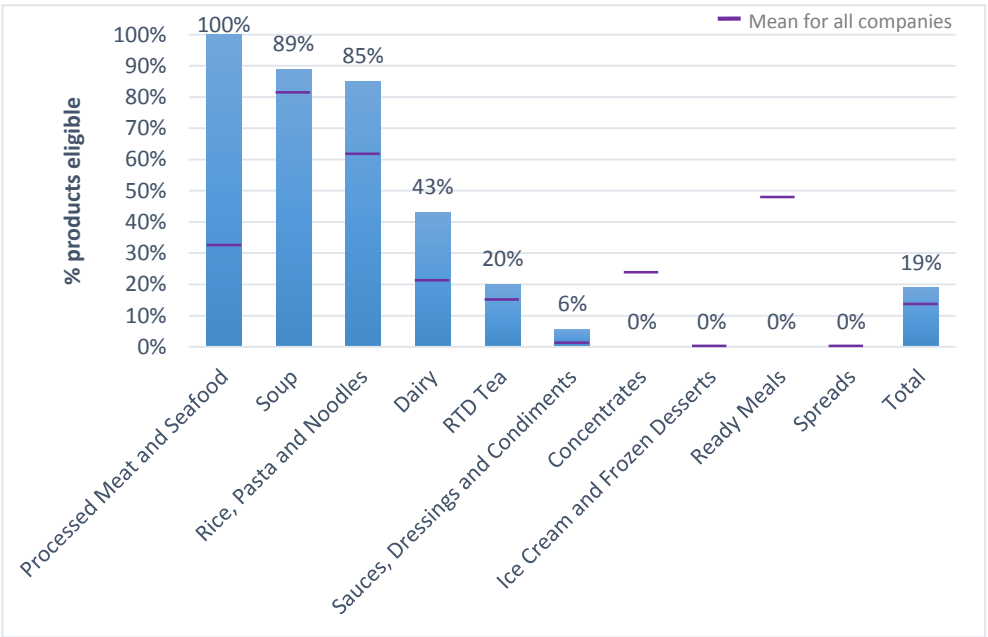


Figure 21.6 *Proportions of Unilever products meeting WHO Euro criteria for marketing to children – by Category*



Overall a relatively low proportion of Unilever products (19%) were eligible for marketing to children (Figure 21.5), decreasing substantially to 9% when results were weighted by sales. Just as seen in the HSR analyses, Mexico and South Africa ranked highest in terms of the proportion of products eligible for marketing to children, with China selling zero products that were eligible for marketing to children. These results are explained in part by looking at Figure 21.6, with countries selling products in categories such

as ‘Processed Meat and Seafood’, ‘Soup’ and ‘Rice, Pasta and Noodles’ generally ranked higher than other countries.

More specific results broken down by company and country for Unilever can be seen in Appendix B.

CONCLUSIONS AND INTERPRETATION

Key findings

Mean healthiness of products

1. The overall mean healthiness of the nine companies' products included in this analysis was low and the mean healthiness of product portfolios varied substantially between the 21 companies. Differences in mean healthiness between companies reflect primarily differences in product mix but also to a lesser extent differences in the healthiness of products within the same categories.
2. Companies with portfolios dominated by dairy products ranked higher when evaluating healthiness using the Health Star Rating, whereas companies selling predominantly confectionery items generally ranked lowest. For example, companies such as FrieslandCampina, Danone and Lactalis ranked highest in terms of mean HSR whereas companies such as Ferrero, Meiji and Mondelez ranked lowest.
3. Overall, developed countries such as the UK and Australia had higher mean HSRs than developing countries such as India and China.
4. Estimates of the comparative healthiness of product portfolios weighted by sales changed some rankings and generally increased the disparities between companies. Some companies derived quite different proportions of their sales from healthy versus unhealthy products. Robust sales-weighted estimates on single-product level will provide the best idea of the impact of a company's products on consumer health. The third-party derived sales data used in the current assessment does not provide sufficient granularity to do this. Obtaining these data directly from companies would be the only method to do this.
5. When results were weighted by sales, seven out of the 21 companies showed an increase in mean HSR, illustrating that proportionately more sales are from healthy products (e.g. General Mills, Grupo Bimbo). However, 12 out of the 21 companies showed a decrease in mean HSR when results were weighted by sales, illustrating that proportionately more sales are from less healthy products (e.g. PepsiCo, Mars). These companies with portfolios dominated by less healthy products should put more emphasis on marketing and driving sales of their healthier options.
6. When examining results by Euromonitor subset, categories such as 'Processed Fruit and Vegetables', 'Edible oils' and 'Juice' had the highest mean HSRs. Not surprisingly, categories such as 'Confectionery', 'Concentrates' and 'Other Hot Drinks' which generally contained products high in sugar had the lowest mean overall HSRs.

Proportions of products defined as healthy (HSR >= 3.5) or eligible for marketing to children

7. The overall proportion of companies' products defined as healthy was low (31%). The proportion of products defined as healthy varied between companies but not as much as the variation observed in mean healthiness using the mean HSR.
8. The proportion of companies' products defined as eligible for marketing to children under the WHO Euro criteria was very low (14%) with some companies having no products eligible for marketing to children (e.g. Ferrero and Meiji). This metric highlights the poor nutritional quality of most of the foods included but is less able to discriminate between the relative performances of companies than the HSR.
9. The proportion of sales eligible for marketing to children under the WHO Euro criteria was also very low, and often lower than the proportion of sales defined as 'healthy' using the HSR cut point of >=3.5. This reflects the more stringent criteria applied for eligibility to market to children under WHO. A useful example is seen in the 'Juice' category, with 100% fruit/vegetable juices scoring highly using the HSR nutrient profile model yet being ineligible for marketing to children under the WHO Euro model. Similarly, all products in the 'Savoury Snacks' category are considered ineligible for marketing to children under the WHO Euro criteria however can score highly in the HSR algorithm if they contain a substantial proportion of fibre or vegetable content.
10. Just as with the overall mean HSR findings, developed countries such as the UK and Australia generally had a higher proportion of products with an HSR>=3.5 compared to developing countries such as India and China. However this was not necessarily the case when examining the proportion of products eligible for marketing to children under the WHO criteria, with India improving in its rankings under this scheme.

11. In some Euromonitor subsets there was a wide range in the proportion of products eligible by country (e.g. breakfast cereals ranging from 7-43%), which likely illustrates that the product range within each category can vary significantly between countries and perhaps the nutritional content of similar products could also vary greatly, highlighting areas in greater need of reformulation.

Methodological limitations

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

The limited nutrition data available. The problem was addressed by using proxy data to enable nutrient profiling unless a large proportion of data was missing. In the latter circumstance products were excluded from analysis. Of note, no alternative nutrient profiling model has been identified that would make better use of the limited data available. The most likely impact of using proxy nutrient values was underestimation of the real differences between products (because proxy values were imputed at the sub-category level), and correspondingly, therefore, underestimation of the real differences between companies.

The absence of a complete list of all marketed products. Listings of all products sold by each company in each country were sought from the companies but most did not provide them. The solution was to compile listings based upon data extracted from The George Institute's global Food*Switch* database and in Mexico's case INSP's branded food database and to have each company check these data. Just over half of all companies provided nutrient data directly or checked The George Institute and INSP data prior to analysis, however this left just under half of all company data unchecked directly. Results should be interpreted with caution as a result.

Restriction of the analysis to the top five categories from the 21 largest global food and beverage companies. The assessment of the top five categories from 21 of the largest food and beverage manufacturers was a pragmatic compromise designed to ensure feasibility and meaningful comparisons based upon the average nutritional composition of the majority of products made by each company. For the majority of companies restricting to the top five categories resulted in more than 90% of product sales being included in analysis. This strategy will not have affected the primary conclusions of the project about the relative nutritional quality of the products provided by the included companies but how the included companies compare to other smaller companies, artisanal/street food providers, quick service restaurants or home-cooked meals is unknown.

Global sales coverage. There is a high level of variation in the proportion of a company's global sales derived from the nine countries included the analyses – ranging from 2% (FrieslandCampina) to 98% (Tingyi). The lower this proportion, the less representative the results are of a company's actual global profile. Key reason for this was the selection of the nine countries in the analysis not necessarily being the largest markets for a number of companies. For example, Ajinomoto is a Japanese company, with Japan where its sales dominate. However, Japan was not included as a country in this analysis. This was a result of the countries chosen only where suitable datasets were available. However, this analysis was not designed to undertake a global comparison, but instead to use these nine countries to highlight differences both within and between the healthiness of the product portfolios from the top 21 global food companies. We were also unable to show what percentage of the within-category sales were covered with the products included in analysis, however this was beyond the scope of our analysis and is beyond the depth of the data provided by Euromonitor.

Degree of industry participation. 15 of the 21 companies elected to engage in the research process in some way, with 13 providing nutrition information to use in analysis. Although this is a high level of industry participation for the project, participation from the remaining six companies would have enabled more complete, up-to-date data and more reliable and informative analyses with reduced reliance on imputed values.

Limitations of the nutrient profiling tools. The HSR and WHO Euro models are both still in early stages of implementation and subject to ongoing evaluation and refinement. While both are based upon extensive

research and validation, there is continuing discussion of how each operates for some food categories. Those fruit juices that are '100% fruit juices', for example, are able to receive high HSRs despite being high in free sugars because they receive positive points for fruit content. By contrast, the WHO Euro model deems juice not eligible to be marketed to children given its role as a significant source of free sugars for children regardless of other nutritional value. However, it also recognises that countries may, according to national context, take the decision to permit the marketing of 100% fruit juices (sometimes in small portions) to children. In addition, the HSR model does not score 'non-nutritive' products, such as tea and instant coffee. As a result, these products have not been included in the analysis. This means that the results for companies such as Unilever and Nestlé, for example, are based on the proportion of its sales that are not generated by tea and coffee.

Differences in rankings. The different methods of nutritional assessment of the product portfolio (mean HSR, proportion HSR≥3.5 and proportion eligible for marketing to children) consistently identified FrieslandCampina as a top ranked company and Ferrero as a bottom ranked company based upon the nutritional profiles of the overall product portfolio (Appendix D). For the company rankings in between there was variation in the specific rankings assigned by each assessment method. This varied again with sales-weighting. As such, the various profiling methods proved an effective way to discriminate between companies based upon the healthiness of products but did not give the same findings. This is unsurprising given the different elements that contribute to each method and the similar mean scores of several companies for some measures. This latter observation means that there is the potential for changes in the scores of just a few products to switch around the positions of companies in the rankings.

No consideration of serving size. Overweight and obesity are importantly determined by the quantity of food people choose to consume at one sitting (portion size) and the serving size recommended on packs may influence the quantity of a product eaten. This may particularly be the case for products provided in packages eaten at a single sitting (although not all such products have a serving size that corresponds to the package size). The association between serving size and portion size for products provided in packages that contain multiple servings is also not always strong. It has been argued that nutrient profiling models should include consideration of serving size but the absence of agreed national and international standards has meant that this has not proved possible to date.

Limited granularity of sales data. The Euromonitor 2016 sales data, are provided by category, not by individual product. This limits the capacity to obtain robust sales-weighted estimates of metrics because it is not possible to precisely match a sales figure for a category to an HSR value. Accordingly, for the overall sales-weighted results, the sales of the company within each category were matched to the mean HSR for all company products within that category. Under this strategy it is possible that erroneous results could be obtained because it is unlikely that sales volumes of every item sold by a company within a given category were the same. So, while the process should give a reasonable sales-weighted estimate of the mean healthiness of products it is imperfect. Similarly, the sales-weighted results relating to sales of healthy products and sales of products eligible to be marketed to children are estimates, as it is unlikely that the proportion of sales of healthy products or those eligible to be marketed to children in any category is directly proportional to the total sales of that category. The exclusion of company data for categories in which the company makes up less than 0.1% of market share is, by contrast, likely to have had little impact on the results.

Recommendations for companies

Though obvious, it is worth stating the four key ways companies should be encouraged to improve their impact on public health:

1. **Product mix –** increase the proportion of healthier products within the portfolio.
2. **Marketing investment** – re-direct investment towards the marketing of products with healthier compositions. Companies have a particular opportunity to improve the nutrient composition of products that are important for children's diets and to positively support them.
3. **Product reformulation** – improve the nutrition composition of existing products, particularly established, high sales volume products.
4. **Transparent labelling** – include all Codex-recommended nutrients on product labels – particularly countries like India and China where regulations don't currently require them. Consumers are increasingly seeking transparency, particularly full and clear nutrition information on products.

APPENDIX A – Mandatory nutrition labelling requirements by country

Appendix A, Table 1: *Mandatory nutrition labelling requirements by country*

Nutrient	AU	CN	HK	IN	MX	NZ	ZA	UK	US
Energy (kJ/ kcal)	√	√	√	√	√	√	√	√	√
Protein	√	√	√	√	√	√	√	√	√
Total fat	√	√	√	√	√	√	√	√	√
Saturated fat	√	X	√	X	√	√	√	√	√
Trans fat	X	X	√	X	X	X	X	X	√
Carbohydrate	√	√	√	√	√	√	√	√	√
Total sugar	√	X	√	√	√	√	√	√	√
Added sugar	X	X	X	X	X	X	X	X	X[1]
Fibre	X	X	√	X	√	X	√	X	√
Sodium/salt	√	√	√	√	√	√	√	√	√
Sweetener	X	X	X	X	X	X	X	X	X
FVNL	X[2]	X	X	X	X	X[2]	X	X	X

[1] In 2017 the US introduced legislation to include added sugar content on product labels, however the data for this project were from before this change.

[2] In Australia and New Zealand, the proportion of 'characterising' ingredients must be declared on product labels, and hence for a larger number of products compared to other countries, FVNL content could be determined based on this information.

APPENDIX B – Results by category and country for each company

1. Ajinomoto

Appendix B, Table 1a: *Mean HSR by Euromonitor subset for each country for Ajinomoto*

	China	Hong Kong	South Africa	UK
Ready Meals	-	3.3	-	-
Rice, Pasta and Noodles	-	-	-	3.9
Sauces, Dressings and Condiments	0.5	0.7	3.2	1.7

Appendix B, Table 1b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Ajinomoto*

	China	Hong Kong	South Africa	UK
Ready Meals	-	57%	-	
Rice, Pasta and Noodles	-	-	-	100%
Sauces, Dressings and Condiments	0%	0%	33%	0%

Appendix B, Table 1c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Ajinomoto*

	China	Hong Kong	South Africa	UK
Ready Meals	-	0%	-	-
Rice, Pasta and Noodles	-	-	-	100%
Sauces, Dressings and Condiments	0%	0%	25%	0%

2. Arla

Appendix B, Table 2a: *Mean HSR by Euromonitor subset for each country for Arla*

	Australia	Hong Kong	UK	USA
Dairy	1.2	1.1	3.2	1.9

Appendix B, Table 2b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Arla*

	Australia	Hong Kong	UK	USA
Dairy	0%	0%	52%	6%

Appendix B, Table 2c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Arla*

	Australia	Hong Kong	UK	USA
Dairy	0%	0%	38%	10%

3. Campbell's

Appendix B, Table 3a: *Mean HSR by Euromonitor subset for each country for Campbell's*

	Australia	Hong Kong	Mexico	New Zealand	UK	USA
Baked Goods	-	-	-	-	-	3.2
Juice	4.9	4.5	4.8	-	5.0	3.2
Ready Meals	-	-	-	3.5	-	-
Sauces, Dressings and Condiments	3.0	2.8	3.8	3.3	-	3.1
Savoury Snacks	2.7	-	-	2.6	-	2.1
Soup	3.5	3.3	3.1	3.6	3.4	3.2
Sweet Biscuits, Snack Bars and Fruit Snacks	1.0	-	-	1.1	-	-

Appendix B, Table 3b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Campbell's*

	Australia	Hong Kong	Mexico	New Zealand	UK	USA
Baked Goods	-	-	-	-	-	58%
Juice	100%	100%	100%	-	100%	47%
Ready Meals	-	-	-	100%	-	-
Sauces, Dressings and Condiments	0%	33%	100%	60%	-	50%
Savoury Snacks	21%	-	-	21%	-	0%
Soup	76%	55%	43%	100%	84%	64%
Sweet Biscuits, Snack Bars and Fruit Snacks	0%	-	-	0%	-	58%

Appendix B, Table 3c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Campbell's*

	Australia	Hong Kong	Mexico	New Zealand	UK	USA
Baked Goods	-	-	-	-	-	35%
Juice	0%	0%	0%	-	0%	0%
Ready Meals	-	-	-	100%	-	-
Sauces, Dressings and Condiments	0%	0%	0%	0%	-	1%
Savoury Snacks	0%	-	-	0%	-	0%
Soup	67%	73%	68%	100%	80%	71%
Sweet Biscuits, Snack Bars and Fruit Snacks	0%	-	-	0%	-	-

4. Coca-Cola

Appendix B, Table 4a: *Mean HSR by Euromonitor subset for each country for Coca-Cola*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Bottled Water	2.6	5.0	2.4	5.0	5.0	3.3	2.7	2.8	2.2
Carbonates	1.6	1.1	1.6	1.9	1.5	1.5	1.3	1.8	1.4
Concentrates	-	-	-	-	-	1.6	-	1.9	-
Dairy	-	3.0	3.5	-	3.5	-	-	-	-
Juice	4.5	3.6	1.3	0.8	4.7	3.3	4.9	4.2	2.5
Processed Fruit and Vegetables	3.6	-	-	-	-	-	-	-	-
RTD Tea	-	-	1.3	-	-	-	1.4	-	1.8
Sports and Energy Drinks	1.8	2.0	-	-	1.6	1.5	1.4	1.8	1.6

Appendix B, Table 4b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Coca-Cola*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Bottled Water	21%	100%	14%	100%	100%	43%	32%	27%	9%
Carbonates	7%	0%	8%	18%	0%	4%	0%	9%	0%
Concentrates	-	-	-	-	-	0%	-	0%	-
Dairy	-	0%	100%		71%	-	-	-	-
Juice	90%	100%	0%	0%	100%	61%	100%	75%	36%
Processed Fruit and Vegetables	100%	-	-	-	-	-	-	-	-
RTD Tea	-	-	0%	-	-	-	0%	-	0%
Sports and Energy Drinks	7%	0%	-	-	0%	0%	0%	0%	0%

Appendix B, Table 4c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Coca-Cola*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Bottled Water	21%	100%	14%	100%	100%	53%	32%	27%	67%
Carbonates	5%	4%	8%	35%	10%	9%	24%	7%	10%
Concentrates	-	-	-	-	-	0%	-	0%	-
Dairy	-	0%	50%	-	14%	-	-	-	-
Juice	0%	0%	0%	0%	0%	0%	0%	0%	0%
Processed Fruit and Vegetables	5%	-	-	-	-	-	-	-	-
RTD Tea	-	-	33%	-	-	-	0%		12%
Sports and Energy Drinks	27%	0%	-	-	19%	12%	0%	38%	29%

5. ConAgra

Appendix B, Table 5a: *Mean HSR by Euromonitor subset for each country for ConAgra*

	India	Mexico	New Zealand	South Africa	USA
Breakfast Cereals	-	3.0	-	-	
Dairy	-	-	-	-	2.1
Edible Oils	3.5	4.6	-	-	-
Processed Fruit and Vegetables	-	-	-	-	4.1
Processed Meat and Seafood	-	-	-	-	2.4
Ready Meals	-	-	-	-	3.3
Sauces, Dressings and Condiments	-	2.8	-	-	-
Savoury Snacks	3.5	2.9	2.3	2.4	2.1
Spreads	3.9	-	-	-	-

Appendix B, Table 5b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for ConAgra*

	India	Mexico	New Zealand	South Africa	USA
Breakfast Cereals	-	43%	-	-	-
Dairy	-	-	-	-	13%
Edible Oils	75%	100%	-	-	-
Processed Fruit and Vegetables	-	-	-	-	98%
Processed Meat and Seafood	-	-	-	-	40%
Ready Meals	-	-	-	-	70%
Sauces, Dressings and Condiments	-	23%	-	-	-
Savoury Snacks	72%	17%	17%	0%	28%
Spreads	100%	-	-	-	-

Appendix B, Table 5c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for ConAgra*

	India	Mexico	New Zealand	South Africa	USA
Breakfast Cereals	-	0%	-	-	-
Dairy	-	-	-	-	31%
Edible Oils	100%	100%	-	-	-
Processed Fruit and Vegetables	-	-	-	-	5%
Processed Meat and Seafood	-	-	-	-	38%
Ready Meals	-	-	-	-	69%
Sauces, Dressings and Condiments	-	0%	-	-	-
Savoury Snacks	0%	0%	0%	0%	0%
Spreads	0%	-	-	-	-

6. Danone

Appendix B, Table 6a: *Mean HSR by Euromonitor subset for each country for Danone*

	Australia	China	Hong Kong	Mexico	South Africa	UK	USA
Bottled Water	5.0	2.4	5.0	2.1	5.0	3.5	5.0
Dairy	2.0	2.4	-	2.8	3.1	3.1	3.8
Ice Cream and Frozen Desserts	-	-	-	-	3.0	-	3.0
Juice	-	-	-	-	-	1.9	-

Appendix B, Table 6b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Danone*

	Australia	China	Hong Kong	Mexico	South Africa	UK	USA
Bottled Water	100%	14%	100%	5%	100%	48%	100%
Dairy	13%	0%	-	33%	52%	44%	69%
Ice Cream and Frozen Desserts	-	-	-	-	-	-	57%
Juice	-	-	-	-	-	0%	-

Appendix B, Table 6c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Danone*

	Australia	China	Hong Kong	Mexico	South Africa	UK	USA
Bottled Water	100%	14%	100%	5%	100%	45%	100%
Dairy	13%	0%	-	9%	16%	15%	30%
Ice Cream and Frozen Desserts	-	-	-	-	-	-	0%
Juice	-	-	-	-	-	0%	-

7. Ferrero

Appendix B, Table 7a: *Mean HSR by Euromonitor subset for each country for Ferrero*

	Australia	China	Hong Kong	India	Mexico	Zealand	South Africa	UK	USA
Baked Goods	-	-	-	-	-	-	-	1.1	-
Confectionery	0.9	0.5	0.9	0.5	0.5	1.0	0.8	0.6	1.0
Spreads	0.5	-	0.5	0.5	0.5	0.5	0.5	0.5	0.5

Appendix B, Table 7b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Ferrero*

	Australia	China	Hong Kong	India	Mexico	Zealand	South Africa	UK	USA
Baked Goods	-	-	-	-	-	-	-	0%	-
Confectionery	0%	0%	0%	0%	0%	0%	0%	0%	0%
Spreads	0%	-	0%	0%	0%	0%	0%	0%	0%

Appendix B, Table 7c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Ferrero*

	Australia	China	Hong Kong	India	Mexico	Zealand	South Africa	UK	USA
Baked Goods	-	-	-	-	-	-	-	0%	-
Confectionery	0%	0%	0%	0%	0%	0%	0%	0%	0%
Spreads	0%	-	0%	0%	0%	0%	0%	0%	0%

8. General Mills

Appendix B, Table 8a: *Mean HSR by Euromonitor subset for each country for General Mills*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Baked Goods	2.0	-	-	2.0	1.2	1.9	-	1.8	1.4
Breakfast Cereals	-	-	-	-	-	-	-	-	2.7
Dairy	-	-	-	-	2.4	-	-	3.6	3.4
Ice Cream and Frozen Desserts	-	2.5	1.6		1.7	-	-	1.8	
Processed Meat and Seafood	-	-	3.0	-	-	-	-	-	-
Ready Meals	3.5	-	-	-	-	2.0	3.1	2.5	2.4
Rice, Pasta and Noodles	3.7	-	-	-	-	-	-	-	-
Sauces, Dressings and Condiments	3.7	-	-	-	-	3.8	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	2.5	-	2.6		2.2	2.5	2.5	2.5	2.2

Appendix B, Table 8b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for General Mills*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Baked Goods	17%	-	-	10%	4%	11%	-	14%	2%
Breakfast Cereals	-	-	-	-	-	-	-	-	23%
Dairy	-	-	-	-	15%	-	-	69%	60%
Ice Cream and Frozen Desserts	-	5%	0%	-	0%	-	-	0%	
Processed Meat and Seafood	-	-	17%	-	-	-	-	-	-
Ready Meals	78%	-	-	-	-	0%	50%	20%	18%
Rice, Pasta and Noodles	95%	-	-	-	-	-	-	-	-
Sauces, Dressings and Condiments	82%	-	-	-	-	100%	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	0%	-	14%	-	12%	0%	0%	0%	8%

Appendix B, Table 8c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for General Mills*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Baked Goods	6%	-	-	10%	4%	7%	-	8%	1%
Breakfast Cereals	-	-	-	-	-	-	-		8%
Dairy	-	-	-	-	3%	-	-	32%	24%
Ice Cream and Frozen Desserts	-	0%	0%	-	0%	-	-	0%	-
Processed Meat and Seafood	-	-	33%	-	-	-	-	-	-
Ready Meals	78%	-	-	-	-	0%	0%	0%	3%
Rice, Pasta and Noodles	95%	-	-	-	-	-	-	-	-
Sauces, Dressings and Condiments	0%	-	-	-	-	0%	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	0%	-	0%	-	0%	0%	0%	0%	0%

9. Grupo Bimbo

Appendix B, Table 9a: *Mean HSR by Euromonitor subset for each country for Grupo Bimbo*

	China	Mexico	UK	USA
Baked Goods	2.1	3.2	3.5	2.9
Confectionery	-	1.1	-	-
Savoury Snacks	-	2.2	-	1.9
Spreads	-	1.4	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	-	1.4	-	-

Appendix B, Table 9b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Grupo Bimbo*

	China	Mexico	UK	USA
Baked Goods	15%	51%	75%	48%
Confectionery	-	0%	-	-
Savoury Snacks	-	30%	-	8%
Spreads	-	0%	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	-	2%	-	-

Appendix B, Table 9c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Grupo Bimbo*

	China	Mexico	UK	USA
Baked Goods	30%	64%	69%	48%
Confectionery	-	0%	-	-
Savoury Snacks	-	0%	-	0%
Spreads	-	0%	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	-	0%	-	-

10.Kellogg's

Appendix B, Table 10a: *Mean HSR by Euromonitor subset for each country for Kellogg's*

	Australia	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Baked Goods	-	-	-	-	-	-	-	2.2
Breakfast Cereals	3.7	2.8	3.0	2.6	3.7	3.4	3.2	3.3
Processed Meat and Seafood	-	-	-	-	-	-	-	3.9
Savoury Snacks	1.3	2.4	-	-	1.3	2.1	2.0	2.0
Sweet Biscuits, Snack Bars and Fruit Snacks	2.4	-	-	2.1	2.4	2.5	2.2	1.8

Appendix B, Table 10b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Kellogg's*

	Australia	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Baked Goods	-	-	-	-	-	-	-	9%
Breakfast Cereals	71%	31%	39%	24%	71%	40%	50%	48%
Processed Meat and Seafood	-	-	-	-	-	-	-	95%
Savoury Snacks	0%	0%	-	-	0%	25%	0%	8%
Sweet Biscuits, Snack Bars and Fruit Snacks	27%	-	-	6%	27%	0%	10%	4%

Appendix B, Table 10c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Kellogg's*

	Australia	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Baked Goods	-	-	-	-	-	-	-	1%
Breakfast Cereals	23%	3%	31%	3%	23%	33%	20%	11%
Dairy	-	-	-	0%	-	-	-	-
Processed Meat and Seafood	-	-	-	-	-	-	-	90%
Savoury Snacks	0%	0%	-	0%	0%	0%	0%	0%

Sweet Biscuits, Snack Bars and Fruit Snacks	0%	-	-	0%	0%	0%	0%	0%

11.Kraft Heinz

Appendix B, Table 11a: *Mean HSR by Euromonitor subset for each country for Kraft Heinz*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Baked Goods	-	-	-	-	3.0	-	2.2	-	-
Dairy	2.6	-	1.8	-	2.4	-	-	-	2.4
Juice	3.1	-	-	-	-	-	-	-	-
Processed Fruit and Vegetables	4.1	-	4.0	4.0	-	4.2	-	4.3	-
Processed Meat and Seafood	-	-	-	-	1.9	-	2.0	-	3.9
Ready Meals	-	-	-	-	1.7	3.4	3.0	3.5	2.1
Sauces, Dressings and Condiments	1.8	1.1	2.0	2.0	1.7	2.5	2.7	2.4	2.4
Savoury Snacks	-	-	-	-	-	-	-	-	4.0
Soup	-	-	3.5	-	-	3.5	3.5	3.5	-
Spreads	2.7	-	3.2	-	-	2.3	-	2.0	-

Appendix B, Table 11b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Kraft Heinz*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Baked Goods	-	-	-	-	0%	-	8%	-	-
Dairy	38%	-	17%	-	50%	-	-	-	41%
Juice	49%	-	-	-	-	-	-	-	-
Processed Fruit and Vegetables	99%	-	100%	100%	-	99%	-	100%	-
Processed Meat and Seafood	-	-	-	-	22%	-	0%		88%
Ready Meals	-	-	-	-	0%	26%	0%	84%	12%
Sauces, Dressings and Condiments	3%	6%	9%	0%	0%	19%	20%	11%	20%
Savoury Snacks	-	-	-	-	-	-	-	-	88%
Soup	-	-	75%	-	-	92%	100%	91%	-
Spreads	0%	-	0%	-	-	25%	-	0%	-

Appendix B, Table 11c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Kraft Heinz*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Baked Goods	-	-	-	-	100%	-	33%	-	-
Dairy	6%	-	0%		0%	-	-	-	20%
Juice	0%	-	-	-	-	-	-	-	-
Processed Fruit and Vegetables	19%		0%	0%	-	19%	-	0%	-
Processed Meat and Seafood	-	-	-	-	11%		64%	-	14%
Ready Meals	-	-	-	-	0%	89%	0%	98%	9%
Sauces, Dressings and Condiments	0%	0%	0%	0%	0%	0%	0%	0%	2%
Savoury Snacks	-	-	-	-	-	-	-	-	0%
Soup	-	-	75%	-	-	99%	100%	100%	-
Spreads	0%	-	0%	-	-	0%	-	0%	-

12.Lactalis

Appendix B, Table 12a: *Mean HSR by Euromonitor subset for each country for Lactalis*

	Australia	Hong Kong	Mexico	New Zealand	South Africa	UK	USA
Dairy	3.4	2.8	3.6	-	2.8	3.0	3.0
Juice	-	-	-	-	4.4	-	-
RTD Coffee	4.2	-	-	4.0	-	-	-

Appendix B, Table 12b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Lactalis*

	Australia	Hong Kong	Mexico	New Zealand	South Africa	UK	USA
Dairy	61%	54%	80%	-	32%	39%	52%
Juice	-	-	-	-	73%	-	-
RTD Coffee	100%	-	-	100%	-	-	-

Appendix B, Table 12c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Lactalis*

	Australia	Hong Kong	Mexico	New Zealand	South Africa	UK	USA
Dairy	24%	6%	9%	-	31%	10%	46%
Juice	-	-	-	-	0%	-	-
RTD Coffee	0%	-	-	0%	-	-	-

13.Mars

Appendix B, Table 13a: *Mean HSR by Euromonitor subset for each country for Mars*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Confectionery	1.6	0.8	2.2	2.0	1.2	1.9	2.0	0.9	0.7
Ice Cream and Frozen Desserts	1.3	-	-	-	-	-	-	1.7	1.5
Ready Meals	-	-	-	-	-	-	1.0	-	-
Rice, Pasta and Noodles	3.8	-	-	-	-	3.7		3.6	3.0
Sauces, Dressings and Condiments	2.7	-	4.0	-	-	2.6	2.3	3.4	-
Savoury Snacks	-	-	-	-	-	-	-	-	0.5
Soup	-	-	-	-	-	-	2.0	-	-
Spreads	0.5	-	-	-	-	-	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	-	-	-	-	-	-	-	1.4	-

Appendix B, Table 13b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Mars*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Confectionery	17%	6%	39%	23%	14%	25%	50%	9%	0%
Ice Cream and Frozen Desserts	0%	-	-	-	-	-	-	0%	0%
Ready Meals	-	-	-	-	-	-	0%	-	-
Rice, Pasta and Noodles	100%	-	-	-	-	96%	-	96%	53%
Sauces, Dressings and Condiments	35%	-	100%	-	-	40%	7%	57%	-
Savoury Snacks	-	-	-	-	-	-	-	-	0%
Soup	-	-	-	-	-	-	17%	-	-
Spreads	0%	-	-	-	-	-	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	-	-	-	-	-	-	-	0%	-

Appendix B, Table 13c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Mars*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Confectionery	0%	0%	1%	0%	0%	0%	0%	0%	0%
Ice Cream and Frozen Desserts	0%	-	-	-	-	-	-	0%	0%
Ready Meals	-	-	-	-	-	-	0%	-	-
Rice, Pasta and Noodles	100%	-	-	-	-	85%	-	99%	45%
Sauces, Dressings and Condiments	0%	-	0%	-	-	0%	3%	0%	-
Savoury Snacks	-	-	-	-	-	-	-	-	0%
Soup	-	-	-	-	-	-	36%	-	-
Spreads	0%	-	-	-	-	-	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	-	-	-	-	-	-	-	0%	-

14.Meiji

Appendix B, Table 14a: *Mean HSR by Euromonitor subset for each country for Meiji*

	Australia	China	Hong Kong
Confectionery	-	1.5	1.0
Ice Cream and Frozen Desserts	-	2.1	2.4
Sweet Biscuits, Snack Bars and Fruit Snacks	0.6	-	0.8

Appendix B, Table 14b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Meiji*

	Australia	China	Hong Kong
Confectionery	-	0%	4%
Ice Cream and Frozen Desserts	-	0%	0%
Sweet Biscuits, Snack Bars and Fruit Snacks	0%	-	0%

Appendix B, Table 14c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Meiji*

	Australia	China	Hong Kong
Confectionery	-	0%	0%
Ice Cream and Frozen Desserts	-	0%	0%
Sweet Biscuits, Snack Bars and Fruit Snacks	0%	-	0%

15.Mondelez

Appendix B, Table 15a: *Mean HSR by Euromonitor subset for each country for Mondelez*

	Australia	China	India	Mexico	New Zealand	South Africa	UK	USA
Baked Goods	-	-	-	-	-	-	1.0	-
Concentrates	-	0.5	0.5	1.2	-	-	-	-
Confectionery	1.0	1.8	0.6	1.5	1.1	1.4	0.8	0.6
Dairy	-	-	-	1.2	-	1.0	3.1	0.5
Other Hot Drinks	1.1	-	0.9	-	0.5	2.8	0.5	-
Savoury Snacks	-	1.9	-	1.3	0.9	1.0		2.5
Sweet Biscuits, Snack Bars and Fruit Snacks	1.3	0.7	0.9	0.9	1.1	1.0	1.4	1.5

Appendix B, Table 15b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Mondelez*

	Australia	China	India	Mexico	New Zealand	South Africa	UK	USA
Baked Goods	-	-	-	-	-	-	0%	-
Concentrates		0%	0%	10%	-	-	-	-
Confectionery	0%	0%	0%	25%	0%	18%	2%	0%
Dairy	-	-	-	0%	-	0%	30%	0%
Other Hot Drinks	13%	-	9%	-	0%	50%	0%	-
Savoury Snacks	-	0%	-	0%	0%	0%	-	25%
Sweet Biscuits, Snack Bars and Fruit Snacks	5%	0%	0%	0%	0%	0%	9%	4%

Appendix B, Table 15c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Mondelez*

	Australia	China	India	Mexico	New Zealand	South Africa	UK	USA
Baked Goods	-	-	-	-	-	-	0%	-
Concentrates	-	0%	0%	85%	-	-	-	-
Confectionery	0%	0%	0%	0%	0%	0%	0%	0%
Dairy	-	-	-	0%	-	0%	35%	0%
Other Hot Drinks	0%	-	0%	-	0%	0%	5%	
Savoury Snacks	-	0%	-	0%	0%	0%	-	0%
Sweet Biscuits, Snack Bars and Fruit Snacks	0%	0%	0%	0%	0%	0%	0%	0%

16.Nestlé

Appendix B, Table 16a: *Mean HSR by Euromonitor subset for each country for Nestlé*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Bottled Water	-	-	-	-	2.3	-	-	2.0	3.0
Breakfast Cereals	4.2	-	-	-	3.0	-	-	3.4	-
Confectionery	1.1	1.2	1.3	0.5	1.4	1.2	0.5	0.7	1.0
Dairy	2.1	0.6	3.6	3.5	1.4	-	1.4	2.8	1.2
Ice Cream and Frozen Desserts	-	-	2.4	-	2.3	-	-	-	2.3
Other Hot Drinks	2.1	-	-	-	-	1.6	0.8	2.2	-
RTD Coffee	-	-	1.1	-	-	-	-	-	-
RTD Tea	-	-	1.5	-	-	-	-	-	-
Ready Meals	-	-	-	3.5	-	-	-	-	3.1
Rice, Pasta and Noodles	3.1	-	-	2.4	-	2.5	1.5	-	-
Sauces, Dressings and Condiments	-	-	-	1.9	-	2.9	2.1	-	-
Soup	-	-	-	-	-	3.3	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	-	0.5	-	-	-	-	-	-	-

Appendix B, Table 16b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Nestlé*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Bottled Water	-	-	-	-	27%	-	-	0%	39%
Breakfast Cereals	100%	-	-	-	32%	-	-	57%	-
Confectionery	1%	0%	0%	0%	29%	2%	0%	2%	1%
Dairy	26%	0%	80%	50%	13%	-	27%	39%	17%
Ice Cream and Frozen Desserts	-	-	3%	-	0%	-	-	-	9%
Other Hot Drinks	19%	-	-	-	-	16%	7%	18%	-
RTD Coffee	-	-	0%	-	-	-	-	-	-
RTD Tea	-	-	0%	-	-	-	-	-	-
Ready Meals	-	-	-	100%	-	-	-	-	50%
Rice, Pasta and Noodles	65%	-	-	9%	-	22%	0%		
Sauces, Dressings and Condiments	-	-	-	0%	-	45%	0%	-	-
Soup	-	-	-	-	-	53%	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	-	0%	-	-	-	-	-	-	-

Appendix B, Table 16c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Nestlé*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Bottled Water	-	-	-	-	13%	-	-	100%	71%
Breakfast Cereals	28%	-	-	-	14%	-	-	27%	
Confectionery	0%	0%	0%	0%	0%	0%	0%	0%	0%
Dairy	0%	0%	15%	10%	3%	-	0%	1%	3%
Ice Cream and Frozen Desserts	-	-	0%	-	0%	-	-	-	0%
Other Hot Drinks	0%	-	-	-	-	0%	0%	0%	-
RTD Coffee	-	0%	0%	-	-	-	-	-	-
RTD Tea	-	-	0%	-	-	-	-	-	-
Ready Meals	-	-	-	100%	-	-	-	-	46%
Rice, Pasta and Noodles	0%	-	-	73%	-	33%	0%	-	-
Sauces, Dressings and Condiments	-	0%	-	0%	-	0%	0%	-	-
Soup	-	-	-	-	-	100%	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	-	0%	-	-	-	-	-	-	-

17.PepsiCo

Appendix B, Table 17a: *Mean HSR by Euromonitor subset for each country for PepsiCo*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Bottled Water	-	-	-	5.0	2.0	-	-	-	2.1
Breakfast Cereals	-	4.0	3.7	4.4	-	-	-	4.0	-
Carbonates	1.6	1.0	1.3	1.9	1.6	1.2	1.2	1.6	2.2
Concentrates	1.5	-	-	-	-	1.5	-	-	-
Juice	-	3.5	4.7	0.8	-	-	-	4.6	3.8
Sauces, Dressings and Condiments	3.6	-	-	-	-	-	-	-	-
Savoury Snacks	3.0	2.9	3.0	2.1	1.7	1.9	1.6	2.4	2.7
Sports and Energy Drinks	1.4	1.4	1.5	-	1.5	1.4	-	1.0	1.5
Sweet Biscuits, Snack Bars and Fruit Snacks	-	-	-	-	1.6	3.3	-	-	-

Appendix B, Table 17b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for PepsiCo*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Bottled Water	-	-	-	100%	0%	-	-	-	5%
Breakfast Cereals	-	79%	61%	100%	-	-	-	93%	-
Carbonates	0%	0%	0%	20%	0%	0%	0%	0%	23%
Concentrates	0%	-	-	-	-	0%	-	-	-
Juice	-	100%	100%	0%	-	-	-	91%	69%
Sauces, Dressings and Condiments	59%	-	-	-	-	-	-	-	-
Savoury Snacks	58%	23%	38%	8%	14%	9%	2%	9%	26%
Sports and Energy Drinks	0%	0%	0%	-	0%	0%	-	0%	0%
Sweet Biscuits, Snack Bars and Fruit Snacks	-	-	-	-	3%	47%	-	-	-

Appendix B, Table 17c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for PepsiCo*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Bottled Water	-	-	-	100%	100%	-	-	-	86%
Breakfast Cereals	-	43%	24%	89%	-	-	-	19%	-
Carbonates	0%	0%	0%	40%	0%	5%	11%	0%	1%
Concentrates	0%	-	-	-	-	0%	-	-	-
Juice		0%	0%	0%	-	-	-	0%	0%
Sauces, Dressings and Condiments	0%	-	-	-	-	-	-	-	-
Savoury Snacks	0%	0%	0%	0%	0%	0%	0%	0%	0%
Sports and Energy Drinks	0%	0%	0%	-	9%	0%	-	0%	0%
Sweet Biscuits, Snack Bars and Fruit Snacks	-	-	-	-	0%	0%	-	-	-

18.FrieslandCampina

Appendix B, Table 18a: *Mean HSR by Euromonitor subset for each country for FrieslandCampina*

	Hong Kong	UK
Dairy	3.2	4.1

Appendix B, Table 18b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for FrieslandCampina*

	Hong Kong	UK
Dairy	63%	100%

Appendix B, Table 18c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for FrieslandCampina*

	Hong Kong	UK
Dairy	19%	50%

19.Suntory

Appendix B, Table 19a: *Mean HSR by Euromonitor subset for each country for Suntory*

	Australia	China	Hong Kong	New Zealand	South Africa	UK
Bottled Water	2.3	-	-	2.8	-	-
Carbonates	-	-	4.6	-	-	2.5
Concentrates	2.4	-	0.5	1.5	-	1.8
Dairy	3.1	-	-	-	-	-
Ice Cream and Frozen Desserts	-	-	-	-	-	3.0
Juice	-	3.5	0.9	4.4	-	1.8
RTD Coffee	-	1.0	-	-	-	-
RTD Tea	-	1.8	-	-	-	-
Sauces, Dressings and Condiments	2.6	-	-	1.9	-	-
Sports and Energy Drinks	1.1	-	1.1	1.2	-	1.5

Appendix B, Table 19b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Suntory*

	Australia	China	Hong Kong	New Zealand	South Africa	UK
Bottled Water	11%	-	-	27%	-	-
Carbonates	-	-	100%	-	-	50%
Concentrates	43%	-	0%	0%	-	0%
Dairy	22%	-	-	-	-	-
Ice Cream and Frozen Desserts	-	-	-	-	-	0%
Juice	-	100%	0%	82%	-	11%
RTD Coffee	-	0%	-	-	-	-
RTD Tea	-	0%	-	-	-	-
Sauces, Dressings and Condiments	7%	-	-	11%	-	-
Sports and Energy Drinks	0%	-	0%	0%	0%	0%

Appendix B, Table 19c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Suntory*

	Australia	China	Hong Kong	New Zealand	South Africa	UK
Bottled Water	11%	-	-	53%	-	-
Carbonates	-	-	0%	-	-	0%
Concentrates	0%	-	0%	0%	-	0%
Dairy	0%	-	-	-	-	-
Ice Cream and Frozen Desserts	-	-	-	-	-	0%
Juice	-	0%	0%	0%	-	0%
RTD Coffee	-	0%	-	-	-	-
RTD Tea	-	0%	-	-	-	-
Sauces, Dressings and Condiments	0%	-	-	0%	-	-
Sports and Energy Drinks	0%	-	0%	0%	0%	-

20.Tingyi

Appendix B, Table 20a: *Mean HSR by Euromonitor subset for each country for Tingyi*

	China
Bottled Water	5.0
Dairy	2.6
Juice	3.6
RTD Tea	1.6
Rice, Pasta and Noodles	0.8

Appendix B, Table 20b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Tingyi*

	China
Bottled Water	100%
Dairy	24%
Juice	97%
RTD Tea	0%
Rice, Pasta and Noodles	0%

Appendix B, Table 20c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Tingyi*

	China
Bottled Water	100%
Dairy	24%
Juice	0%
RTD Tea	14%
Rice, Pasta and Noodles	0%

21.Unilever

Appendix B, Table 21a: *Mean HSR by Euromonitor subset for each country for Unilever*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Concentrates	-	-	-	0.9	-	-	-	-	-
Dairy	2.9	-	3.0	-	3.4	2.8	2.4	2.9	2.8
Ice Cream and Frozen Desserts	1.9	2.1	-	2.3	2.2	1.9	2.3	1.7	2.2
Processed Meat and Seafood	-	-	-	-	-	-	3.1	-	-
RTD Tea	1.9	1.5	-	-	1.7	-	-	-	1.7
Ready Meals	-	-	1.0	-	-	-	-	-	2.1
Rice, Pasta and Noodles	-	-	-	-	-	-	-	3.2	-
Sauces, Dressings and Condiments	3.5	0.8	0.7	2.8	1.9	3.5	2.7	2.5	0.8
Soup	3.1	0.5	-	3.7	3.1	3.2	3.4	-	-
Spreads	-	-	-	1.7	-	-	-	0.7	-

Appendix B, Table 21b: *Proportion of products with HSR>=3.5 by Euromonitor subset for each country for Unilever*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Concentrates	-	-	-	0%	-	-	-	-	-
Dairy	33%	-	33%	-	83%	28%	38%	54%	48%
Ice Cream and Frozen Desserts	0%	2%		2%	0%	0%	4%	0%	6%
Processed Meat and Seafood	-	-	-	-	-	-	13%	-	-
RTD Tea	0%	0%	-	-	0%	-	-	-	0%
Ready Meals	-	-	0%	-	-	-	-	-	0%
Rice, Pasta and Noodles	-	-	-	-	-	-	-	45%	-
Sauces, Dressings and Condiments	65%	0%	0%	33%	0%	68%	30%	18%	0%
Soup	29%	0%	-	82%	25%	31%	70%	-	-
Spreads	-	-	-	0%	-	-	-	0%	-

Appendix B, Table 21c: *Proportion of products eligible for marketing to children using the WHO Euro criteria by Euromonitor subset for each country for Unilever*

	Australia	China	Hong Kong	India	Mexico	New Zealand	South Africa	UK	USA
Concentrates	-	-	-	0%	-	-	-	-	-
Dairy	67%	-	33%	-	58%	67%	41%	33%	18%
Ice Cream and Frozen Desserts	0%	0%	-	0%	0%	0%	0%	0%	0%
Processed Meat and Seafood	-	-	-	-	-	-	100%	-	-
RTD Tea	44%	0%	-	-	40%	-	-	-	14%
Ready Meals	-	-	0%	-	-	-	-	-	0%
Rice, Pasta and Noodles	-	-	-	-	-	-	-	85%	-
Sauces, Dressings and Condiments	0%	0%	0%	0%	0%	0%	36%	2%	0%
Soup	96%	0%	-	95%	95%	96%	95%	-	-
Spreads	-	-	-	0%	-	-	-	0%	-

APPENDIX C – Euromonitor subsets mapped to HSR Categories

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

Table 1 *Euromonitor subsets mapped to Health Star Rating Categories*

1. Non-dairy beverage	1D. Dairy Beverage	2. Non-dairy foods	2D. Dairy foods	3. Oils and spreads	3D. Cheese
Carbonates	Dairy[a]	Baked goods	Dairy[c]	Dairy[d]	Dairy[e]
Other hot drinks		Breakfast cereals			
Juice		Confectionery			
Concentrates		Sauces, dressings and condiments			
Bottled water		Ice cream and frozen desserts[b]			
RTD tea		Processed fruit and vegetables			
Sports and energy drinks		Processed meat and seafood			
RTD Coffee		Ready meals			
		Rice, pasta and noodles			
		Sweet biscuits, snack bars and fruit snacks			
		Savoury snacks			
		Soup			
		Spreads			

[a] Milk-based beverages and yoghurt drinks only

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

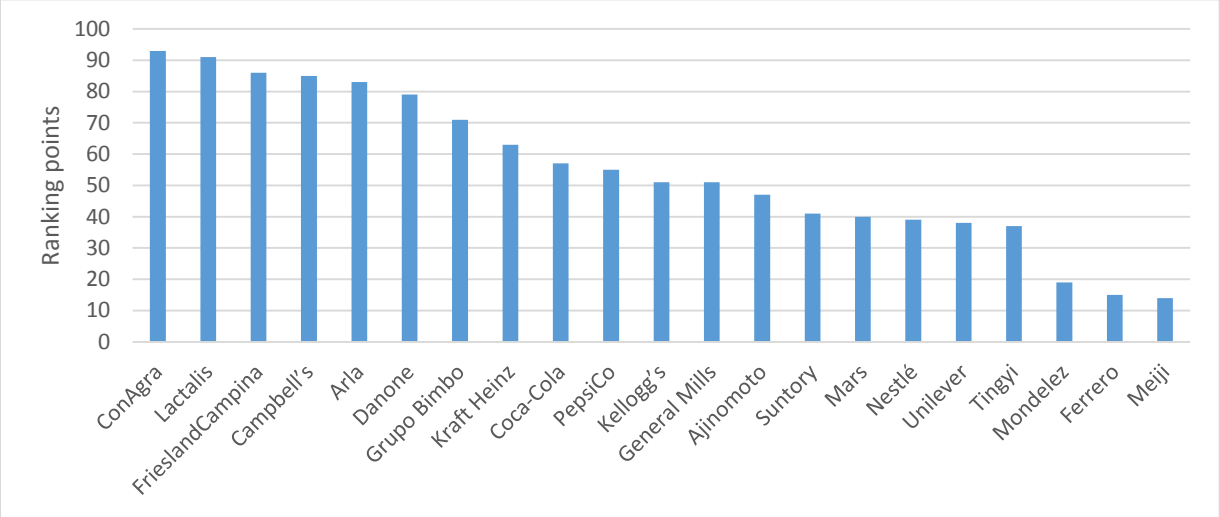
[c] Dairy foods other than those listed in 1D, 3 or 3D

[d] Butter and margarine products only

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

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

Appendix D, Figure 1 *Overall ranking of companies based upon ranking points*



The figure above demonstrates the comparative ranking of companies across the different evaluation methods used. Where a company ranked 1st (of the 21 companies) it received 21 points. Companies manufacturing predominantly dairy products such as ConAgra, FrieslandCampina, Lactalis and Danone ranked highly across all evaluation methods, and companies manufacturing predominantly confectionery such as Mondelez, Meiji and Ferrero ranked lowest. The individual rankings per evaluation method are shown in Appendix D, Table 1.

Appendix D, Table 1 *Ranking of companies based upon overall product portfolio*

Company	Mean HSR	Sales weighted mean HSR	Proportion healthy i.e. products ≥3.5 and above	Sales from healthy products	Meet WHO criteria	Sales from products meeting WHO criteria
Ajinomoto	18	18	18	14	12	11
Arla	7	4	7	3	5	3
Campbell's	5	6	6	8	4	5
Coca-Cola	11	14	13	15	11	9
ConAgra	4	5	2	4	1	4
Danone	2	2	4	5	6	6
Ferrero	21	21	21	21	20	20
General Mills	12	9	16	10	14	14
Grupo Bimbo	13	8	8	7	2	1
Kellogg's	10	10	15	9	15	15
Kraft Heinz	6	7	5	6	9	12
Lactalis	3	3	3	2	7	7
Mars	17	20	11	18	13	18
Meiji	19	17	20	20	21	21
Mondelez	20	19	19	19	18	17
Nestlé	15	13	14	12	10	8
PepsiCo	9	11	10	11	17	16
FrieslandCampina	1	1	1	1	3	2
Suntory	8	15	12	17	19	19
Tingyi	16	16	9	13	16	10
Unilever	14	12	17	16	8	13