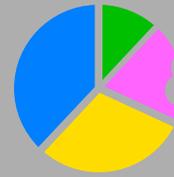


July 2021



ACCESS TO  
**NUTRITION**  
INITIATIVE

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

Report 4: The time for change  
July 2021





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## Abbreviations

<b>ATNI</b>	Access to Nutrition Initiative	<b>IOM</b>	International Organization for Migration
<b>BMS</b>	breast-milk substitutes	<b>LMICs</b>	low-and middle-income countries
<b>CDC</b>	Centers for Disease Control and Prevention	<b>MIF</b>	Mondēlez International Foundation
<b>CGF</b>	The Consumer Goods Forum	<b>NCD</b>	non-communicable disease
<b>CIK</b>	contributions in kind	<b>NGO</b>	non-governmental organization
<b>CSR</b>	corporate social responsibility	<b>OECD</b>	Organisation for Economic Co-operation and Development
<b>The Code</b>	International Code of Marketing of Breast-milk Substitutes	<b>PPE</b>	personal protective equipment
<b>F&amp;B</b>	food and beverage	<b>SBN</b>	SUN Business Network
<b>FAO</b>	Food and Agriculture Organization	<b>SDGs</b>	Sustainable Development Goals
<b>FCDO</b>	Foreign, Commonwealth and Development Office (UK)	<b>SMEs</b>	small and medium-sized enterprises SOFI
<b>FIA</b>	Food Industry Asia	<b>SOFI</b>	<i>2021 The State of Food Security and Nutrition in the World Report</i>
<b>GAIN</b>	Global Alliance for Improved Nutrition	<b>UN</b>	United Nations
<b>HUL</b>	Hindustan Unilever Limited	<b>UNICEF</b>	United Nations Children's Fund
<b>IFAD</b>	International Fund for Agricultural Development	<b>WFP</b>	World Food Programme
<b>IFPRI</b>	International Food Policy Research Institute	<b>WHO</b>	World Health Organization
<b>ILO</b>	International Labour Organization		



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# 1. Summary

As the 2021 *The State of Food Security and Nutrition in the World* report notes, the world was already off track to reach the Sustainable Development Goals, which include ending malnutrition in all its forms by 2030, and COVID-19 has set things significantly further back: in 2020, almost one in three people in the world did not have access to adequate food, an increase of almost 320 million in a single year. The Access to Nutrition Initiative (ATNI) is committed to supporting the contribution of the food industry to addressing the world's nutrition challenges. The need to ensure access to nutritious food has never been more urgent or more evident than during this pandemic.

This report is the last in a series of four that have charted the impact of COVID-19 and, specifically, the ways in which food and beverage manufacturers have pivoted their operations to tackle the threats to the food system and to food security worldwide.

The first report set out ATNI's new COVID-19 research Framework, developed to identify and categorize actions by food and beverage manufacturers in response to the global crisis.

The second report summarized the results of an assessment of the actions taken by 39 of the world's major food manufacturers in the first six months of the pandemic.

The third report took a deeper dive into three middle-income countries: Mexico, India and Nigeria. It combined research on the governments' response to COVID-19's health and nutrition impacts with information on the responses of the countries' largest food manufacturers.

This fourth report returns to the 39 food and beverage companies to see the development of their response beyond the immediate crisis of the first few months, and highlights new trends such as increasing concerns around inequity in the food system and issues such as vaccination priority. Recommendations for manufacturers are threaded throughout, drawing on learnings from all four reports and from consultation with expert stakeholders.

After more than one year since the start of the pandemic, it is clear that COVID-19 and the responses to it by companies and consumer reactions have presented risks and challenges for nutrition, including issues around increased consumption and marketing of unhealthy foods, donations that may not be of healthy products and concerns around inappropriate labeling of products as being immunity boosting. However, there are clear opportunities for companies to play a more positive role, with examples emerging – whether this is responding to consumer demand for healthier products, renewing a focus on equity and priority populations, or leveraging their ability to support supply chains.

This report begins with an overview of COVID-19's impacts on health and on all forms of malnutrition, a full year after the publication of the first report, and includes a timeline of key moments and reports that have been published since the start of the crisis. The effects of COVID-19 fall on the most vulnerable, with this inequity coming very strongly to the fore in recent months, including around vaccination access: nutrition inequities are discussed in section 3.2. New consumer trends, which changed so dramatically during the first lockdowns, have continued to be evident (section 3.3).

The report then turns to an overview of recent action by food companies across all the Categories of the Framework.

**Governance and leadership:** COVID-19 continues to impact the bottom line of companies but 2020 annual reports suggest that companies have largely pivoted successfully around the challenges posed by the pandemic, including a shift towards online purchasing. However, there is little evidence of strategic and sustainable changes that place nutrition at the heart of the response. In particular, reporting across all categories is often inadequate and outdated (where it is dated at all), and is



often focused primarily on home markets, rendering it challenging for stakeholders to understand the development of companies' COVID-19 responses over time and across different geographies and populations, particularly those most at risk of malnutrition in all its forms. Developing a strategy and plan that includes creating a healthier food environment and that supports the whole value chain in all key markets will both hasten a healthy recovery and improve pandemic preparedness and resilience into the future.

**Healthier products, labeling and claims:** There was a rapid increase in interest among consumers for comfort food and also for products that claim to maintain a healthy immune system and this has continued, with many new products coming to markets. Companies should ensure that all health claims are firmly evidence-based and do not appear on unhealthy foods. Fortification to address malnutrition is as important as ever, but there is little evidence of companies committing to scaling up resources for fortification to ensure that the most vulnerable receive good nutrition during the pandemic, and this would be welcomed.

**Affordability and accessibility:** Few commitments were found by companies to ensuring widescale affordability or accessibility of healthy food during the crisis, other than through donations. In-kind and financial donations were evident from the earliest days of the pandemic and continue to the time of writing, with a recent shift towards funding for vaccinations. It is not clear which organizations will continue to be supported by donations and in what form – and, in particular, whether donations of food are healthy or not, with some evidence of unhealthy foods being donated. But companies should consider going beyond donations to commit to ongoing affordability and accessibility of healthy products for the whole population.

**Responsible marketing:** It was immediately evident that marketing campaigns were shifting to the new reality of life in lockdown, focusing on online campaigns and with some evidence that advertising leveraged consumer concerns about the pandemic. Responsible marketing should be more, not less, of a priority during a crisis – particularly for vulnerable groups and for children, who spend so much more time online during lockdown.

**Protecting employees and promoting healthy lifestyles:** All the companies reacted swiftly to the many health threats to the workforce. Initially focusing on provision of protective equipment and on basic (but temporary) financial protection, there has in recent months been a greater focus on mental health and on employee vaccination. Action taken by companies should be country-specific, with regular reporting on longer-term efforts made to support health and nutrition in the workplace. This support for health and nutrition should be provided more widely across the value chain, particularly to SMEs that are such a crucial part of the resilience of the supply chain.

**Engagement:** Research found several examples of individual company and industry association lobbying of government on COVID-19-related issues, such as vaccination prioritization for the food sector. Industry associations are also active in sharing best practice (including on the response to COVID-19) and the pandemic has led to some trade associations emphasizing the importance of nutrition and public health. Any lobbying on nutrition and food issues should only be in support of measures that are beneficial for wider public health.

**Infant and young child nutrition:** In the early days of the pandemic, there was initial uncertainty – rapidly quelled – about the safety of breastfeeding, but many companies have not clearly and explicitly restated that breastfeeding remains best for babies in the current context. Additionally, concerns were almost immediately raised by NGOs that the International Code of Marketing of Breast-milk Substitutions was being violated: all the reports in this series note examples of this, including from ATNI's own research in Mexico and the Philippines. All companies should reiterate commitment to The Code and follow this up with action.

Overall, the research found many more examples of company responses taken in home markets, many of which are based in Europe and the United States, rather than in other countries. As a result, there are



more examples from these countries in this report. ATNI calls on companies to provide more detailed reporting in their annual reports, CSR reports and websites on action beyond the home market.

ATNI hopes that NGOs, investors, governments and the food industry itself will use the series of reports to inform their approaches to enabling a response to COVID-19 that maximizes benefits for nutrition. Even before the pandemic, the extent of all forms of malnutrition globally was a clear indication that the food system was not delivering for those with little or no access to affordable healthy food. Already more than halfway through the Decade of Action on Nutrition, the world is long overdue a food-system transformation, building back better and fairer from COVID-19, and the world's major food and beverage companies can and must play a key role in driving this forward. ATNI hopes that this report and its recommendations will help companies to provide and promote good nutrition for all, during the immediate crisis and far into the future.

Together, the recommendations presented throughout this report form a coherent and comprehensive package of measures to ensure an effective nutrition-sensitive response and recovery from the COVID-19 pandemic. Figure 1 summarizes the most urgent recommendations, to be actioned immediately were a similar crisis to arise in the future.

ATNI calls on all the world's major food and beverage companies to step further along this path, taking consistent steps towards a future in which the food system is more resilient to COVID-19 and its economic and nutrition aftershocks, and also to any crises in the future. COVID-19 has been a moment of reckoning and it must be a moment of change.





Figure 1: Immediate nutrition response by the food industry to a (COVID-19 or similar) pandemic crisis

### Category A:

#### Governance and leadership

- ✓ Deliver and regularly report on the nutrition-sensitive, equitable recovery and resilience strategy/ plan across all key markets
- ✓ Fully support and comply with national/international nutrition-sensitive guidance on addressing the crisis
- ✓ Work closely with value-chain partners to ensure resilience of the food system

### Category C:

#### Affordability and accessibility

- ✓ Maintain prices for healthy products for all consumers during the crisis
- ✓ Donate only healthy products and only through authorized channels
- ✓ Ensure continuation of the supply chain to safeguard accessibility of food

### Category E:

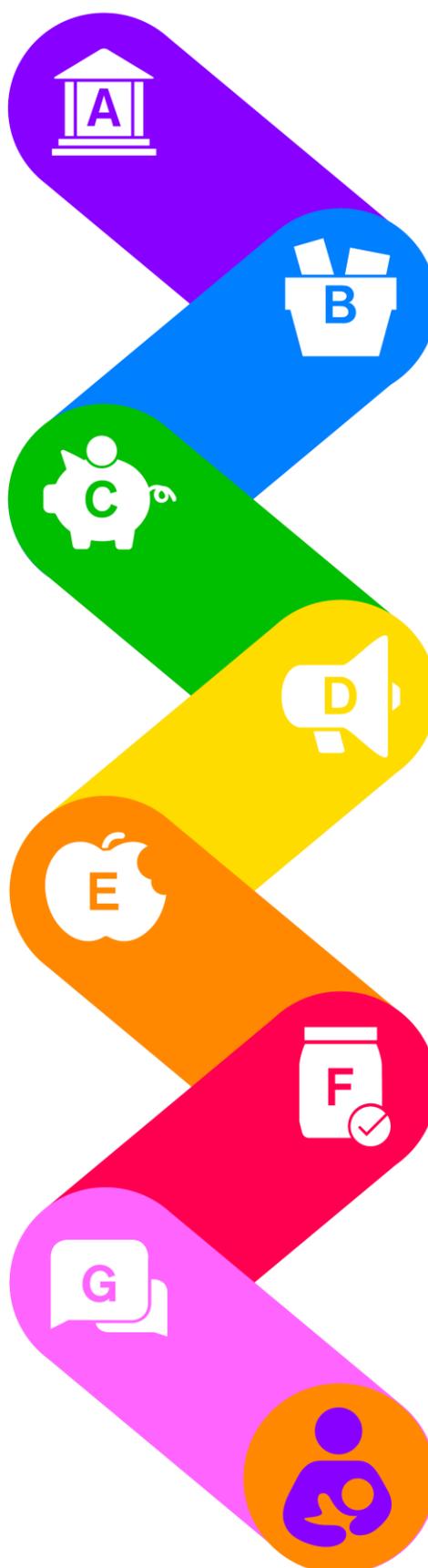
#### Protecting employees and promoting healthy lifestyles

- ✓ Safeguard all employees' health and nutrition and support wellbeing of workers and suppliers throughout the value chain

### Category G:

#### Engagement

- ✓ Intensify work with industry associations to address the nutrition impacts of the crisis collectively



### Category B:

#### Safe and healthier products

- ✓ Ensure continuation of production of healthy (including fortified) foods during crisis

### Category D:

#### Responsible marketing

- ✓ Do not use marketing that leverages consumer concerns about the crisis
- ✓ Do not use marketing that targets vulnerable groups such as children

### Category F:

#### Nutrition labelling and claims

- ✓ Ensure that health claims do not appear on unhealthy food and do not mislead on immunity

### Infant and young child nutrition

- ✓ Emphasize explicitly and prominently that breastfeeding in the context of COVID-19 not only remains safe but that this is best for babies.
- ✓ Explicitly support WHO recommendations on breastfeeding in any health crisis
- ✓ Adhere strictly to the International Code of Marketing of BMS and all subsequent relevant WHA resolutions



## 2. Process

This series of reports was commissioned by the UK's Foreign, Commonwealth and Development Office (then the Department for International Development) in March 2020 in the weeks immediately following the start of the COVID-19 crisis. It became clear that there was a need for ATNI and its stakeholders to improve understanding of the impacts of the pandemic on the food system and, specifically, the action already being taken by the world's largest food and beverage (F&B) manufacturers and the steps that they could take in future to provide better nutrition to consumers and improved resilience to their supply chains as the world comes to terms with the new normal.

ATNI was commissioned to research these impacts and actions in depth. In consultation with external experts, ATNI developed a Framework to direct its ongoing research, designed with the intention of being flexible and adaptable over time. The structure of the Framework reflects the eight Categories used in ATNI's Global and Spotlight Indexes – and this has proved to be a robust decision, providing clear guidance and leading to the identification of the main areas of action (and inaction) by the companies.

Weekly data-gathering has been undertaken by ATNI, systematically sourcing materials from third parties and supplementing this with Google searches where an issue of interest had been identified. This has enabled ATNI to track the latest responses of food manufacturers, the wider food industry, consumers, NGOs and government to COVID-19 and its impact on nutrition, from March 2020 until June 2021.

A series of four reports – of which this current report is the last – have been developed, each of which has had a distinct aim:

[Report 1: Framework](#) (July 2020) introduced the project: to identify action by major F&B manufacturers to what was, at the time, an acute crisis. It set out the Framework and its development, and the aims and audience for the report series and reported on some initial steps that had been taken.<sup>1</sup>

[Report 2: An Acute Response](#) (October 2020) summarized the results of a 'deep-dive' assessment into 39 of the world's major food manufacturers' responses to the pandemic.<sup>2</sup> These 39 companies (listed in Annex 2) are the world's 25 largest F&B manufacturers, plus the largest manufacturers in the United States and India, and the nine baby food manufacturers that are included in ATNI's Global Index 2021.<sup>3</sup>

[Report 3: A Country-level Response – India, Mexico and Nigeria](#) (February 2021) looked in more detail at three middle-income countries. It presented information on the health and nutrition impact of COVID-19 on each country and the governments' responses, combining this with desk research on the largest food manufacturers by 2019 retail sales value in each of the three countries.<sup>4</sup>

[Report 4: A Time for Change](#) (July 2021) is timed to coincide with the pre-summit of the UN Food Systems Summit. It looks at the impact of the first 18 months of the COVID-19 pandemic on global nutrition and updates the second report, using the eight Categories of the Framework to structure the findings, and provides a set of recommendations which, taken together, form a coherent and comprehensive package of measures to ensure an effective nutrition-sensitive response and recovery from COVID-19.

In contrast to the research undertaken in summer 2020, this fourth report is not a deep dive into the 39 companies. Instead, ATNI researchers undertook a rapid scan of the companies' main websites in early June 2021, focusing particularly on recently published annual reports and CSR reports. This research was supplemented with extra investigation into specific issues, where needed. It sets out what has



changed in the past year and generally has not repeated examples that have already been included in the October 2020 report.<sup>5</sup>

Equity and vaccination are two areas that have come out very strongly in the first half of 2021; these are captured by the Framework Categories of 'Governance and leadership' and 'Protecting employees and promoting healthy lifestyles'. The longer time period between the publication of reports 3 and 4 enabled ATNI researchers to capture more detail from the F&B manufacturers' 2020 annual and CSR reports, many of which appeared in the public domain in the second quarter of 2021.

The recommendations threaded throughout section 4 draw on learning gathered across all the reports, including the insights gained from the third, country-specific report. Input into the draft recommendations was obtained through a consultation process with external experts (see Annex 1).

Finally, each report has ended with an Annex of key reports that have been recently published by third parties (such as NGOs and the World Health Organization), enabling readers to access some of the most important reporting. A timeline of some select publications also appears in this report as figure 2.

### **Box 1: Research limitations**

ATNI's COVID-19 research is based only on resources found through desk research rather than through interaction with companies, in contrast with ATNI's Index report research. All sources used are fully referenced and appear as endnotes.

A further limitation is that a preponderance of the information (particularly reporting in English) has been available on developed markets only (such as in Europe and the United States), rather than in emerging markets. The reports from high-income countries, however, can help to illustrate general trends and offer some lessons for other geographies.

Because the research is based almost entirely on information in the public domain (and was subject to language constraints, relying primarily on English-language sources, supplemented with some material in Spanish), a lack of information about a company does not necessarily mean that a company is not taking action to address the COVID-19 crisis.

In its June 2021 research, ATNI research analysts primarily focused on information reported by parent companies as opposed to subsidiaries, specific brands or overseas markets. Annual reports and sustainability reporting for 2020 were checked where these had published, which cover the entire operation worldwide but still tend to have greatest detail on the home market.



## 3. COVID-19 and nutrition: one year on

### 3.1 The global situation ebbs and flows

#### 3.1.1. The direct health repercussions

The COVID-19 pandemic continues to shake the world, moving through countries and communities and wreaking havoc on lives and livelihoods. At the time of writing (mid-July 2021), the total number of confirmed cases worldwide has reached 190 million and over 4 million deaths.<sup>6</sup> Vaccinations are rising but with devastating differences in distribution between and within countries: just 1.1% of people living in low-income countries have received at least one dose by mid-July, compared with a global average of 26.5%.<sup>7</sup>

For those with nutrition-related conditions, the evidence is growing that the direct impacts of COVID-19 are particularly severe. A modeling study published in February 2021 suggests that ‘the majority of adult COVID-19 hospitalizations nationwide [in the United States] are attributable to at least one of four pre-existing conditions: obesity, hypertension, diabetes, and heart failure, in that order’: combining the four conditions, 64% of COVID-19 hospitalizations might have been prevented.<sup>8</sup> In the UK, studies have found that an estimated 36% of COVID-19 hospitalizations have been attributed to lack of physical activity and excess body weight,<sup>9</sup> and that there is a linear increase in the risk of severe COVID-19 outcomes as BMI increases (particularly in people under 40 and of Black ethnicity), with even a small increase in BMI over 23 having an impact.<sup>10</sup> In Mexico, a national observational study found that obesity alone tripled the risk of death from COVID-19, and that this increased when combined with other underlying conditions.<sup>11</sup> This has very significant implications not only for the health of individuals and families, but for economies: World Obesity has estimated that up to a third of the costs of the global downturn due to COVID-19 might be attributable to these predisposing risks.<sup>12</sup>

#### **Box 2: Nutrition and vaccination**

The latest development in the COVID-19 trajectory, which has come to the fore since the third report in this series was published, is vaccination and vaccine inequity. Good nutrition (including addressing micronutrient deficiency) is thought to play a role in vaccine efficacy, notably among frail and malnourished older populations.<sup>13</sup> There have been calls for people with obesity to be prioritized for vaccines, because of the significantly worse COVID-19 outcomes experienced by this population – for example, the European Association for the Study of Obesity’s call to action released in April 2021.<sup>14</sup>

For more on vaccination, see sections 3.2.2 (inequity) and 4.6.3 (the F&B manufacturers’ response).



### 3.1.2. COVID-19's impacts on all forms of malnutrition

“The COVID-19 pandemic was a powerful wake-up call that exposed the fleeting nature of our progress on food security and nutrition”

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The 2021 SOFI report<sup>15</sup>

#### **Undernutrition**

The 2021 *State of Food Security and Nutrition in the World* (the SOFI report) has clearly highlighted the impact of COVID-19, estimating that, after remaining stable for five years, prevalence of undernutrition increased by 1.5% in 2020, with an additional 720–811 million people in the world facing hunger in the course of the year.<sup>16</sup> Data also suggest that over the next two years, there will be an additional 168,000 child deaths globally, with 9.3 million children suffering from wasting and 2.6 million from stunting. This has terrible repercussions for individuals and families and additionally ‘the costs of future productivity loss due to increases in child stunting and mortality from the effects of COVID-19 on child nutrition is estimated to be USD29.7 billion’.<sup>17</sup>

According to a report from the UNICEF Office of Research – Innocenti and the World Food Programme (WFP), school closures have meant that more than 39 billion in-school meals have been missed globally, with over 370 million children worldwide having missed about 40% of the school meals on which they depend.<sup>18</sup>

“The biggest hidden consequence of the [coronavirus] pandemic has been the hunger pandemic it has spawned”

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Mark Lowcock, UN Humanitarian Affairs Emergency and Relief Coordinator<sup>19</sup>

#### **Micronutrient deficiency**

COVID-19 has potential impacts for micronutrient intake, for both adults and children, through restricting dietary diversity and limiting access to programs to address undernutrition. COVID-19 is estimated to lead to an additional 2.1 million cases of maternal anemia.<sup>20</sup> There is also some evidence that micronutrients may be linked to COVID-19 outcomes: an analysis of 33 studies looking at vitamin D and iron found that ‘the absence of micronutrient deficiency significantly reduced COVID-19 incidence and clinical deterioration in hospitalized patients’,<sup>21</sup> and there are many pilot studies looking at (for example) the impact of omega-3<sup>22</sup> and gut microbiota<sup>23</sup> (which can be improved through nutrition) on the severity of COVID-19 outcomes, but further research is needed.

Programs to address undernutrition and micronutrient deficiency have been disrupted by COVID-19. The World Health Organization (WHO) has documented ongoing disruption to nutrition services worldwide, with a survey undertaken in January–March 2021 (updating a survey in the early months of COVID-19) suggesting that there has been some reinstatement of services after the initial very substantial drop-off, but that considerable disruption remains: 42% of responding countries were still reporting disruptions to services for the management of malnutrition (an improvement on 53% in 2020).<sup>24</sup>

Where dietary diversity is being restricted, national food fortification efforts become even more important – but GAIN noted in May 2021 that lockdowns in India, Pakistan and Bangladesh were acting as a barrier to quality assurance checks, with inspectors unable to visit production facilities during lockdown or collect samples.<sup>25</sup>



## Overweight and obesity

The impacts of lockdown have had significant effects on everyday life, restricting access to school meals, making it harder to take physical activity (and increasing screen time), impacting on availability of fresh food (with a shift to longer shelf-life, processed products) and an increase in snacking.<sup>26</sup> Data on the repercussions for weight status are beginning to emerge, with a study of over 2,000 people in the UK finding that almost half had put on weight during lockdown and another in the United States suggesting that 42% of adults had 'gained more weight than they intended ... of those, they gained an average of 29 pounds (the median amount gained was 15 pounds) and 10% said they gained more than 50 pounds'.<sup>27</sup> There is relatively little reliable data so far on the impact on childhood obesity,<sup>28</sup> but small studies from Italy<sup>29</sup> and South Korea<sup>30</sup> suggest that the BMI of children in the studies rose by 0.52kg/m<sup>2</sup> and 1kg/m<sup>2</sup> respectively, after lockdown.

### Box 3: COVID-19 and mental health in the food supply chain

Ensuring good mental health during the pandemic is a challenge for everyone, but particularly so for those on low incomes, in informal employment or without access to free healthcare – as is often the case in the food sector.

A poll in late 2020 of US farm workers found that two-thirds felt that COVID-19 had impacted on their mental health and that the proportion of farmers who said isolation affected their mental health either 'some' or 'a lot' rose from 46% in 2019 to 68% in 2020.<sup>31</sup>

A survey of the UK hospitality sector in October 2020 found that more than 60% felt worried, stressed, demotivated or frustrated about the future, with 36% considering leaving the industry over the following year.<sup>32</sup>

### 3.1.3 The ongoing crisis

Lockdown is the most proximate cause of the COVID-19-related increase in all forms of malnutrition, 'taking a wrecking ball to supply chains and destroying demand', as Lawrence Haddad, Director of GAIN, has put it.<sup>33</sup> However, it is the repercussions of the economic downturn that will have even more long-lasting effects: the IMF has calculated that COVID-19 will cause a total of at least \$10 trillion losses in global output in 2020–1, reaching a total of \$22 trillion by 2025.<sup>34</sup> This will ensure that the crisis will continue, even when (or if) the waves of COVID-19 subside. Economic disruption is both local (affecting local job and product markets, sparking unemployment and increased food prices)<sup>35</sup> and national/global, as shrinking government budgets put national COVID-19 social protection measures and international aid under increasing strain. The 2021 SOFI report states that, 'for the first time in more than 20 years, poverty and income inequality at the global level increased in 2020 as a result of COVID-19 pandemic and the measures put in place to contain it', with the number of people who became 'poor' in 2020 as a result of the pandemic estimated as between 119 and 124 million.<sup>36</sup>

**"We are facing a greater threat this year, as economies have shrunk ... Countries are in a very distressed situation, and it is not getting easier – it is getting more difficult. Some countries have hung on, but for how long?"**

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Agnes Kalibata, UN Secretary-General's Special Envoy to the 2021 Food Systems Summit<sup>37</sup>



The **ongoing impact of COVID-19 on food insecurity is stark**, exacerbating what was already a crisis, with a sharp rise in domestic food prices,<sup>38</sup> particularly in low-income countries.<sup>39</sup> The latest *Global Report on Food Crises 2021* estimates that, in 2020, at least 155 million people experienced acute food insecurity at 'crisis or worse' levels across 55 countries/territories (an increase of 20 million from 2019), with COVID-19 economic shocks being one of the primary drivers for this.<sup>40</sup> The SOFI report has also recently noted that 12% of the world's population was severely food insecure in 2020, but this average disguises significant and growing gender inequity: the prevalence of moderate or severe food insecurity was 10% higher for women than men in 2020 (compared with 6% in 2019).<sup>41</sup>

In the Asia-Pacific region, 1.9 billion people were unable to afford a healthy diet even before COVID-19, and higher prices for fruits, vegetables and dairy products have made it nearly impossible for poor people to achieve healthy diets.<sup>42</sup> In the United States, in March 2021, 8.8% of adults said their household had struggled to get enough to eat in the previous week – this is a fall on the percentage at the height of the lockdown in spring 2020, but still far above the 3.4% in 2019 (and this masks significant racial inequalities, as section 3.2.1 notes).<sup>43</sup> In Brazil, where initial emergency relief in 2020 ('coronavouchers') was stopped and then reinstated at less than half the level and for fewer people, food insecurity has risen during the second wave.<sup>44</sup>

## [“The truth is, there’s a whole lot more pandemic-related pain to come in 2021”](#)

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David Beasley, WFP executive director (launch event for the *Global Report on Food Crises*)<sup>45</sup>

**Areas in humanitarian crisis** are at particular risk. For example, 13 million people in northern Nigeria are anticipated to face high acute food insecurity in June–August 2021 (up from 9.2 million in November 2020) without urgent action.<sup>46</sup> In the Central African Republic, where there has been ongoing conflict for a decade, 47% live in high food insecurity, which has been exacerbated by COVID-19.<sup>47</sup> In Libya, there is an International Organization for Migration (IOM)/WFP initiative has been specifically established to improve food security for vulnerable communities (internally displaced people, returnees and host communities) who have lost livelihoods due to COVID-19.<sup>48</sup>

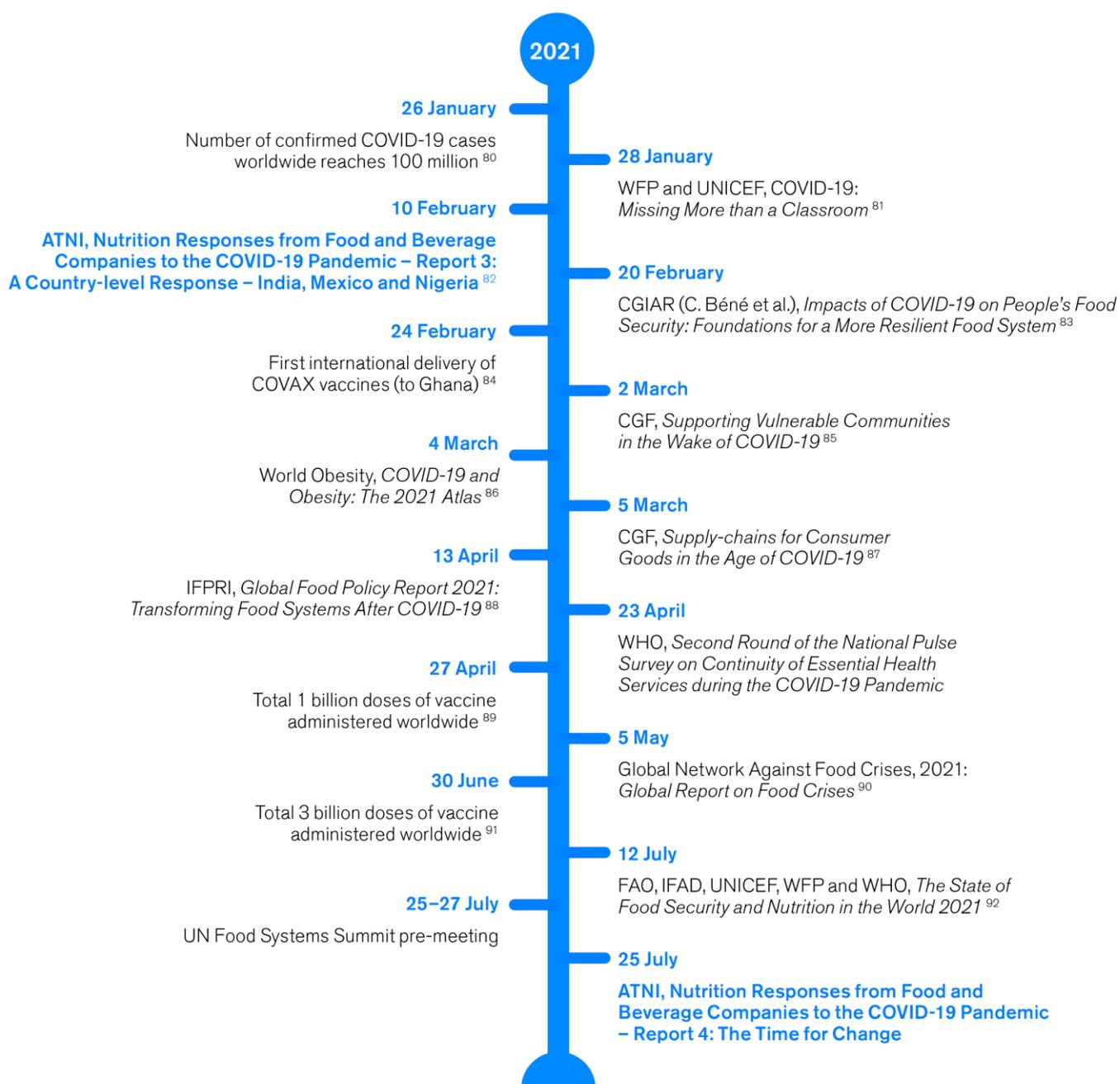
There is some good news, in that **food supply chains** have proved 'more resilient than expected'<sup>49</sup> – albeit with significant variation. Regional trade in South Asia, for example, meant that global trade restrictions could, to some extent, be circumvented by rerouting agricultural products through China.<sup>50</sup> The most resilient systems have been traditional food systems such as subsistence farming, with very short supply chains and relying on family labor) and modern systems (that are strongly vertically integrated and have the capacity to innovate and make better use of digital tools). However, systems in between – i.e. those in the process of moving away from a traditional model – found themselves under more stress and less able to adapt.<sup>51</sup>

**Small and medium-sized enterprises** (SMEs) dominate this in-between model and are particularly affected by restrictions on movement of labor (relying on hired labor) and transport of produce, and restrictions on produce markets<sup>52</sup> The impact on small farmers varies depending on the season in which restrictions come into force (i.e. whether the planting, harvesting or sale of produce is most affected). A study by TechnoServe that interviewed 1,000 people in July 2020 in Africa, Latin America, and India found that 59% of farmers surveyed, 40% of food processors and 38% of small business entrepreneurs were having challenges with finance.<sup>53</sup> Initiatives have been established in response, such as GAIN's Keeping Food Markets Working initiative, which supplies rapid support to food-system workers, to SMEs that supply nutritious foods and to fresh food markets across seven countries in Sub-Saharan Africa and Asia.<sup>54</sup>



Figure 2: Covid-19 and nutrition: key moments and publications timeline







## 3.2 Inequity: a lasting legacy?

### 3.2.1 Nutrition inequity and COVID-19

From the very start of the pandemic in early 2020, the many impacts of COVID-19 have fallen hardest on populations that were already the most vulnerable. It is continuing to widen disparities,<sup>93</sup> making a mockery of early suggestions that it could be a 'great leveler', and with Oxfam describing it as 'the inequality virus'.<sup>94</sup> The worst effects of the disease have clustered among vulnerable populations, exacerbated by lack of appropriate care and by working and living conditions that make it impossible to socially distance.

“COVID-19 has not been an equal opportunity: it goes after people in poor health and those whose daily lives expose them to greater contact with others. And this means it goes disproportionately after the poor”

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Joseph Stiglitz (Nobel Laureate in Economics)<sup>95</sup>

**COVID-19 has restricted access to good nutrition and increased food insecurity**, rapidly exposing inequities in food systems.<sup>96</sup> Lockdowns affect supply of food to markets and shops – leading to rising prices and, in many countries, to increased reliance on e-commerce (food delivery), which is not available to those on the other side of the digital divide. COVID-19 has impacted on access to nutrition programs (including child-feeding programs and school-meal provision). The rises in unemployment and falls in income due to the economic downturn are likely to continue for many years to come.<sup>97</sup> As the WFP points out, the proportion of daily income that is spent on a plate of food varies enormously and, where the proportion is already high, increases in prices (as has been seen in many parts of the world) or a fall in income can be catastrophic.<sup>98</sup>

“If we do not act now, we run the risk of reversing years of progress and letting inequalities increase. We would lose a whole generation, as the damage of undernutrition cannot be undone”

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Lawrence Haddad (GAIN) and Saskia Osendarp (Micronutrient Forum)<sup>99</sup>

The importance of inequality is highlighted in WFP's update to the *2020 Global Report on Food Crises*,<sup>100</sup> subtitled *In Times of COVID-19*.<sup>101</sup> This report makes clear that although 'we still lack systematic information from direct observation to come to fully quantify the impacts' of the pandemic, there are 'five channels through which the COVID-19 pandemic and containment measures are affecting food security and nutrition: loss of income; constrained government finances; **deep[en]ing inequalities**; food systems; increased malnutrition levels; and humanitarian assistance challenges'.

The **impacts of COVID-19 on nutrition inequity** fall particularly hard on specific, vulnerable populations:

One of the largest vulnerable groups are **those on the lowest incomes**, who were the least likely to be able to afford healthy food even prior to the pandemic. Lockdown and subsequent economic shocks are making this situation much worse, as the SOFI report notes (see section 3.1.3 below).

Governments have taken steps to ensure that food reaches those most in need, as noted in the third series in this report. Additionally, food prices are rising globally, including in low-income countries.<sup>102</sup> The FAO's Food Price Index indicates that prices in international markets have risen by 40% from



May 2020 to 2021<sup>103</sup> and the Agricultural Commodity Price Index was approximately 30% higher in mid-July 2021 than in January 2020, with maize and wheat prices 43% and 12% above their January 2020 levels, respectively.<sup>104</sup> This inevitably impacts on the poorest, and this inequality should be a priority for government and for businesses alike.

The differential effects of COVID-19 on the health and economic wellbeing of **people of color** are well documented, particularly in the United States,<sup>105</sup> stemming from longstanding inequity and structural racism:<sup>106</sup> COVID-19 has coincided with (and may have helped to catalyze) the worldwide Black Lives Matter movement.<sup>107</sup> Obesity rates are higher among these populations, which is linked to worse COVID-19 health outcomes (see section 3.1.1), with indications of a higher increase in childhood obesity during the pandemic among children of color.<sup>108</sup> There are also racial disparities in food insecurity: in late March 2021, 16% of US Black and Latino adults reported that their household did not get enough to eat over the last week, compared to 6% of White adults.<sup>109</sup>

**Gender inequity** in nutrition and the food sector is particularly evident under COVID-19. Many COVID-related social-protection measures have failed to take the opportunity to address inequity by using a gender lens, despite the impacts falling hardest on women, with repercussions for families' food security.<sup>110</sup> IFPRI notes that women make up 39% of the global food sector workforce but have suffered an estimated 54% of job losses during the pandemic.<sup>111</sup> Women are more likely to be in informal work, which is common in the food sector – and violence against women in poorly managed, informal workplaces is documented as having risen.<sup>112</sup> Women often have fewer productive assets, and this, too, has been worsened by COVID-19:<sup>113</sup> in northeast Nigeria, women lost access to the cash-for-work programs that allowed them to buy seeds and grow crops.<sup>114</sup> A TechnoServe survey of over 1,000 people from commercial agriculture (farmers), food processing and small businesses (entrepreneurs) identifies improving women's resilience to economic shocks as identified as one of the four main areas for future prioritization in the food supply chain.<sup>115</sup>

**Immigrant, migrant and refugee populations** are at particular risk. Immigrant communities, including migrant farmworkers and service workers in the food/hospitality sector, are reported as having been at high risk of food insecurity.<sup>116</sup> Migrant workers' exclusion from support in India for example – with bureaucracy and the need for documentation forming a barrier to access – has left them open to rising malnutrition.<sup>117</sup> The COVID-19 response has also failed adequately to prioritize refugees and internally displaced people.<sup>118</sup>

**Age-related inequity** is, of course, evident in COVID-19's direct impact, as older people are at well-documented high risk of severe COVID-19 health outcomes. But children are at significant risk of the indirect consequences, including on nutrition. Poor nutrition, particularly in the first 1,000 days of life, can have lifelong and intergenerational negative consequences, and COVID-19 has seen disruption to young child feeding programs and school meals. Young people are also most at risk of job losses and consequent income loss during the economic downturn: the International Labour Organization (ILO) estimates that one in six young workers who had been in employment before the pandemic had lost their jobs.<sup>119</sup>

There is an equity issue with **breastfeeding**, as there can be a socioeconomic gradient and racial difference in rates. A US study in September 2020 found that 'expecting Black and Hispanic mothers are 57% more likely to report that COVID-19 has or would make it harder to breastfeed compared to White mothers' and that '70% of moms covered by Medicaid say that COVID-19 will affect their ability to breastfeed, compared to 43% of moms covered by private insurance'.<sup>120</sup>

There are differences in the way COVID-19 impacts people living in **rural and urban areas** – IFPRI notes that rural areas may have limited access to safe water, fewer healthcare facilities (including critical care) and households tend to have more older members.<sup>121</sup> The economic repercussions of COVID-19 also fall differently:<sup>122</sup> those in urban areas are more likely to be in the food service and industry sectors (which have been worst affected by restrictions and recession), with those in rural areas more focused on agriculture (which has been generally more resilient). There may be



difficulties in using e-commerce in rural areas, limiting potential access to healthy food through this channel.

**Workers in food production, manufacture and retail are often particularly vulnerable.** In factories and retail settings, it is harder both to socially distance or to shield: working from home may be impossible and there may also be inherent dangers at work, and those in the informal sector (more than 2 billion people, the majority in LMICs<sup>123</sup>) are unlikely to have any form of insurance or sick pay. For example, as of mid-June 2021, over 1,450 meatpacking and food-processing plants and 400 farms and production facilities in the United States have had confirmed cases of COVID-19, with more than 91,000 workers testing positive for COVID-19 and at least 465 deaths.<sup>124</sup> Outbreaks have also been documented in lower-income countries: for example, in Brazil meat plants were blamed for helping to spread the virus.<sup>125</sup> For many in the insecure and informal economies it may be impossible to self-isolate, or even to take time off because of vaccine side-effects, without losing income and perhaps a job – which may fuel workplace-related spikes in COVID-19 cases.

**Without action to redress it, inequity will continue to lead to worse health and nutrition outcomes (including from COVID-19). These poor outcomes will contribute to a vicious circle, widening inequalities still further. If food systems are going to be healthy, inclusive and sustainable, these inequities must be addressed.**

### 3.2.2 A 2021 priority: vaccination and the food system

In recent months, **access to vaccines for people working in the food system** has emerged as a new priority. This was not an issue anticipated by or included in the original ATNI Framework for research for this series of reports because there was no suggestion at that stage that vaccines could be produced so astonishingly quickly (i.e. within the timeframe of this ATNI COVID-19 project).

A Declaration by international faith, health and humanitarian leaders noted in May 2021 that 'No-one is safe until everyone is safe.'<sup>126</sup> **But despite international efforts such as COVAX (a global initiative for the procurement and equitable distribution of vaccines), differences in vaccine rates between countries are stark: as of 19 July 2021, 48% of the US population had been fully vaccinated, compared to 6.2% in India, 17% in Mexico and 0.6% in Nigeria.**<sup>127</sup>

In-country vaccination inequity is also very evident and, from the middle of 2020 onwards, there has been public discussion about whether people working in the food industry should be among those prioritized for vaccination. In June 2020, US industry associations wrote a letter to President Trump calling for food workers to receive early vaccination,<sup>128</sup> with a further letter in November.<sup>129</sup>

Such calls have, to some extent, been successful. Food workers are now recognized as essential workers for vaccination purposes by many organizations and countries:

In November, the WHO's *SAGE Roadmap for Prioritizing Uses of COVID-19 Vaccines in the Context of Limited Supply* proposed a stepwise approach to roll-out of vaccines in-country, Stage I is for high-risk health workers and older people and is estimated at 10% of the population. Stage II includes those with comorbidities (obesity is not specifically mentioned) and vulnerable groups including those in humanitarian settings, together estimated at 11–20% of the population. Stage III is for 21–50% of the population (when there is moderate vaccine availability), including lower-risk health workers and 'other essential workers outside health and education sectors'. This third stage includes **workers in the food and agriculture sector**, and those who cannot socially distance at work (with specific mention of meat-processing workers).<sup>130</sup>

In December 2020, the US CDC Advisory Panel recommended that people working in grocery stores should be classed as among 30 million 'frontline essential workers' and be next to be vaccinated<sup>131</sup>



and that farm workers also be prioritized by states – although neither group has consistently been prioritized in practice.<sup>132</sup>

The European Commission has provided guidelines to Member States in developing their vaccination strategies, with one of six priority groups being 'essential sectors outside the health sector', which includes agriculture and food sector workers.<sup>133</sup>

In Brazil, calls were made in February 2021 for abattoir workers in the country to be prioritized for vaccination because of their particularly high risk.<sup>134</sup>

However, this is guidance and is not necessarily adhered to, with some food manufacturers now taking action to encourage and ensure vaccination of their workforce themselves, particularly where access to vaccines is limited (see section 4.6.3). In addition, vaccines in LMICs remain in very short supply, and many workers in the food sector are informal workers and LMICs have a large rural population,<sup>135</sup> which makes distribution of the vaccine challenging even were the food/agriculture sector to be prioritized as suggested by the WHO's Roadmap.

### 3.2.3 The need for action on equity

**The need for action on equity is being made very clear to the food companies, including by investors.**<sup>a</sup> In December 2020 the Interfaith Center on Corporate Responsibility (representing US\$2 trillion of assets) sent a letter<sup>136</sup> to 21 brands in the restaurant and food retail and manufacturing sector, including Campbell's, Coca-Cola, Conagra, General Mills, Kellogg, Keurig Dr Pepper, Kraft Heinz, Mondelēz, Nestlé, PepsiCo and Unilever. It highlights that the COVID-19 crisis has exposed racial inequities in the United States and that the 'way food is developed and marketed to communities of color is another example of how racial inequities can be reinforced, deleteriously impacting the health and well-being of already-vulnerable populations'.<sup>137</sup> It calls on companies to 'examine how their business models, operations and value chains may directly or indirectly contribute to these inequities, and how they are working to create a more equitable and resilient system that benefits workers, the company, shareholders, and communities at large', particularly focusing on product development, advertising and public-engagement practices. A summary of the responses received from the companies was published in May 2021, noting that 'Two-thirds of the companies that were originally sent letters responded, and while some provided insights not previously known to investors, most of the responses failed to adequately address the letter's key questions concerning how a company's business model and practices address food insecurity and racial inequity'.<sup>138</sup>

In any case, inclusivity and diversity make good business sense. In 2018, McKinsey research into over 1,000 companies in 12 countries from a range of sectors found that 'gender and ethnic diversity are clearly correlated with profitability'<sup>139</sup> – and the impact of COVID-19 on vulnerable groups such as women can be mitigated through, for example, enabling more flexible working in the long term and reframing hiring practices to recognize skills learnt during COVID-19.<sup>140</sup> **It is no longer an option for businesses – if it ever were – to leave the poor and vulnerable behind.**

**The good news is that (in)equity in the nutrition-sensitive response to COVID-19 is an issue in which the private sector can indeed make a difference.** It can be addressed through support of the workforce (including addressing vaccine access and ensuring that all can afford to self-isolate to keep their communities and co-workers safe) and, for food companies, ensuring that vulnerable populations are prioritized in their nutrition response. Box 6 (section 4.2.1) summarizes the research for this report that found food manufacturers increasingly and explicitly acknowledging and acting on their role in addressing inequity, including through strategic commitments, donations and vaccine efforts.

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<sup>a</sup> For more on investors, the food industry and COVID-19, see box 7 below



### 3.3 Consumer trends during the pandemic

Many of the consumer trends identified in the [second report](#) in this series have continued to be evident, with **consumer concerns about health**, unsurprisingly, continuing to be a major driver of consumer behavior. A health and nutrition survey by Euromonitor International (conducted in January/February 2021) found 'mental wellbeing' to be the most commonly chosen response to the question of what being healthy means (64% of respondents), along with 'having a healthy immune system' (63%) and maintaining a healthy weight (55%).<sup>141</sup> In February 2021, the FMCG Gurus COVID-19 Survey of 18 countries found three-quarters of consumers planning to eat and drink more healthily as a result of the virus – a proportion that had stayed steady over the preceding six months.<sup>142</sup>

As was discussed in the second and third reports in this series, **functional foods or foods that claim to be immunity-boosting** (and, by extension, seen as protective against COVID-19) continue to be popular,<sup>143</sup> and products are also being launched that claim to aid mental wellbeing. Governments continue to regulate claims – for example, if a product meets specified levels of nutrients (vitamins A, B6, B12, C and D, plus iron, zinc, selenium, folate and copper) then it is permitted by the European Food Safety Authority to include a claim on 'the maintenance of functions of the immune system', but 'no claims are permitted for any 'food or food supplement protecting against viral infection or boosting immunity against any virus'.<sup>144</sup> As the third report in this series noted, in India the AYUSH Ministry has been promoting the benefits of Ayurvedic approaches against COVID-19 (such as the use of curcumin, found in turmeric, to boost immunity against the virus). In contrast, the Food Safety and Standards Authority of India takes a fully evidence-based approach and states that 'no single food/supplement, spice or herb can prevent or treat illness' and does not permit formal health claims about Ayurvedic<sup>145</sup> – although companies continue to market products as boosting immunity, as noted below and in the third report in this series.

There is also a noticeable trend towards **plant-based products**, with US sales of plant-based meat up 42% and plant-based milk 27% between 2019 and 2021<sup>146</sup> – although being plant-based is not, in itself, a guarantee that a product is healthy in other respects, such as low in sugar or fat.

**“People will likely return to some pre-pandemic consumption habits – but other aspects will permanently change, particularly given renewed invigoration around health, employee health, food system heroes and people being proud to work for the food industry.”**

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Sharon Bligh, The Consumer Goods Forum

However, there are also strong trends towards less healthy options: **snacking and comfort food**. For example, there was a 12% rise in biscuit sales in 2020 in India,<sup>147</sup> although ITC notes that there was 'moderation in demand' in the second half of the year.<sup>148</sup> Mondelez's *Second Annual State of Snacking 2020* report undertook research with The Harris Poll in October 2020 in 12 markets (including five LMICs: Brazil, Russia, China, India and Indonesia).<sup>149</sup> It found that 88% of adults globally are snacking more (46%) or the same (42%) during the pandemic than before, with 58% expecting snacking to be part of their 'new normal'. It highlights snacks as being a 'source of comfort and community'. In addition, the report notes that 64% 'plan to continue eating small snacks throughout the day, as opposed to fewer large meals', which, coupled with Mondelez's annual report stating that sales of its 'wellbeing snacks' grew more slowly than traditional snacks, suggests that more of the less healthy snacks are being consumed.<sup>150</sup>

While options for out-of-home consumption of food are limited during lockdown, **eating at home** has a forced resurgence. How far the initial enthusiasm for this will continue is unclear, with some reports



from the United States suggesting that 'cooking fatigue' set in by the end of 2020<sup>151</sup> but a survey in the UK, in contrast, finding that 91% of those taking part in the survey wanted to cook 'as much or more' in 2021 and 81% wanted to eat more healthily.<sup>152</sup>

As noted in the previous reports in this series, how food is purchased is changing, with lockdown having been a major catalyst to what was already a trend towards **online buying in the food system**. This has benefited both grocery retailers and the out-of-home food sector (with dramatic increases in brand value of food delivery companies, such as Just Eat and Deliveroo).<sup>153</sup>

In the United States, for example, a survey suggested that online grocery sales in March 2021 reached \$9.3 billion (an increase of 43% over the same period the previous year), with 69 million households making an average of 2.8 online orders in the month.<sup>154</sup> This is not just a trend in high-income countries: **online sales have been increasing worldwide**, as the third report in this series noted for India, Nigeria and Mexico.<sup>155</sup> In Nigeria, Jumia (an online delivery service) noted a fourfold increase in orders for everyday goods<sup>156</sup> and a recent report estimates that the Indian online grocery market will reach US\$18.2 billion by 2024, up from US\$1.9 billion in 2019.<sup>157</sup> What is being bought online is changing too. Mondelez's survey on snacking suggests that almost half of those surveyed bought snacks online more often than in-store or offline during the pandemic, with 69% intending to continue shopping for snacks online post-pandemic.<sup>158</sup>

As online systems and capacity are developed and extended, they lock in much of the change: online ordering and delivery of food products (including 'nearly ready meals' and meal kits<sup>159</sup>) is here to stay across the food system with, for example, over half of UK consumers saying in September 2020 that they will continue to use meal delivery to the same extent after the crisis ends.<sup>160</sup> However, the **meteoric percentage growth in online shopping should be kept in context**: a poll conducted in the United States in April 2021 showed that in-store shopping is still preferred by at least 80% of shoppers across gender, age and income groups: 'in-store grocery trips still reign supreme'.<sup>161</sup> And for the 40% of the world's population without access to the internet, online shopping is not yet a possibility even where it is theoretically available.<sup>162</sup>

Another aspect of e-commerce that has taken steps forward is **enabling consumers to purchase directly from farmers**, which can potentially help to address market-access challenges and strengthen local food systems,<sup>163</sup> as well as giving farmers more control. This is being encouraged through innovations such as a new app, GrownBy, from the Farm Generations Coop in the United States,<sup>164</sup> and is part of a trend towards **locally sourced foods**. In the UK, the Food Standards Agency found a third of consumers were buying more local produce during the pandemic<sup>165</sup> – and initiatives have been developed such as 'Support your locals' in The Netherlands, which 'helps local food producers and encourages short and hyperlocal supply chains'.<sup>166</sup> This trend towards much more local food has also been identified in developing markets; one report suggests an increase in interest in traditional foods where supply has been limited, for example in Latin America: 'I appreciate the renewed focus on local foods. Normally, if you have everything you want to have, you say 'I'll eat my rice and pasta and whatever I have. But this is not possible at the moment, so you explore what is available locally — the foods your grandparents used to cook. So, communities are getting reacquainted with local knowledge.'<sup>167</sup>

**Local retailers** have recognized their importance to their neighborhood during lockdown, as people are unable to travel to many of their usual stores. There is evidence of small retailers, particularly food and grocery outlets, repositioning themselves within the community, adapting to the new interest and retaining custom for the longer term.<sup>168</sup>

Linked to locally sourced food, there is increased interest in the **role of the food system in caring for the environment**, making the link between the health of people and planet, as the interconnectedness of global food supply chains, food systems and the environment has never been more evident. According to Globaldata's COVID-19 tracker survey, almost half of global consumers (particularly



younger consumers) consider the reduction of their environmental footprint to be more important now as a result of the pandemic.<sup>169</sup>

A broad consumer trend that will be of particular concern to food manufacturers is the dramatic **fluctuation in trust in the food industry**. The *2021 Global Edelman Trust Barometer for Food and Beverage* reports that trust had its 'biggest spike in years' (9 points) in 2020 in the early days of the pandemic, but fell back significantly (by 12 points) in the latter part of the year in many parts of the world, driven by issues including the well-documented high rates of COVID-19 in the food industry (particularly in the meat-processing industry<sup>170</sup>) and concerns about inclusivity and equity: 'The industry experienced declines in 16 of the 27 countries researched with the UK, Canada and Mexico reaching an all-time low in Food & Beverage trust',<sup>171</sup> with a smaller fall in grocery trust.

**Figure 3: Consumer trends during the pandemic**



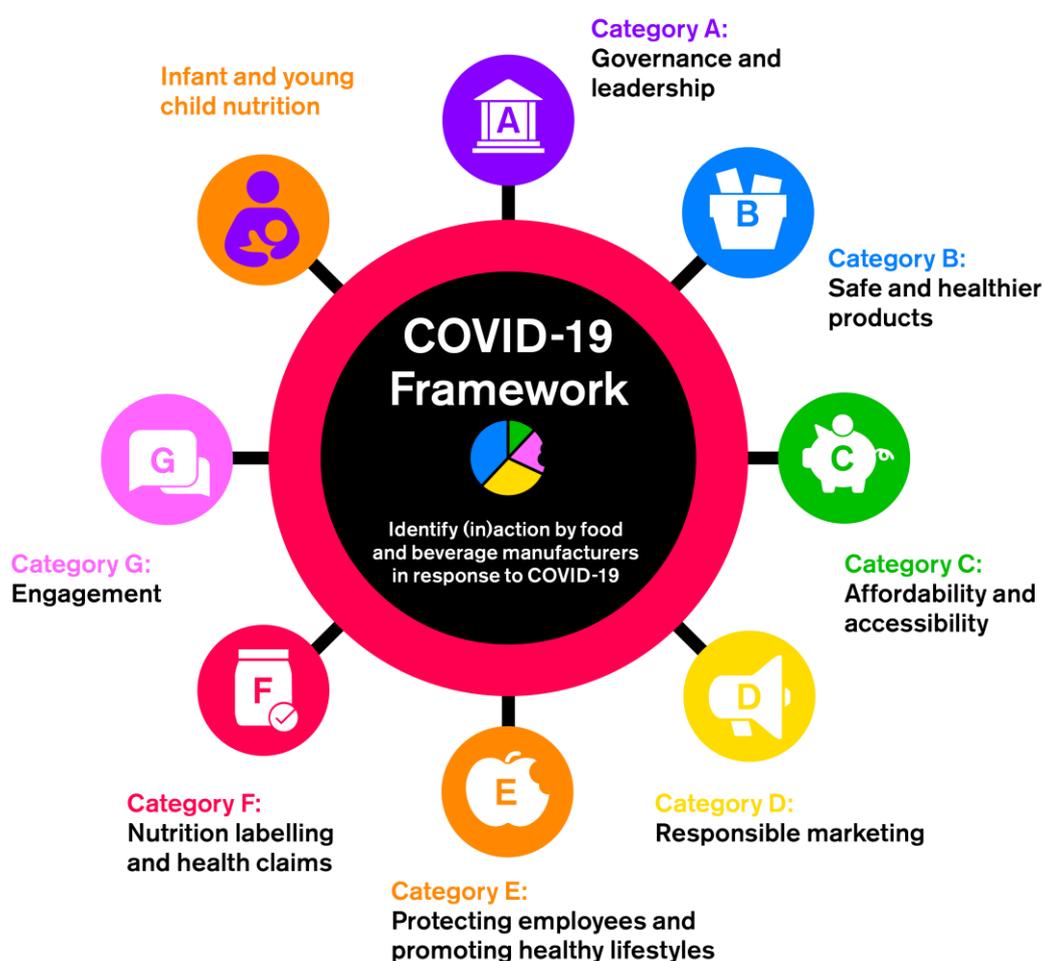


## 4. Overview of company action in the first 18 months of the pandemic

### 4.1 Introduction

The information provided in this section is structured according to the Categories in the Framework developed by ATNI in mid-2020 to facilitate ongoing research into the world's major food manufacturers' response to the pandemic. There are eight Categories, as shown in Figure 4.

Figure 4: The ATNI COVID-19 Framework



Much of what was found in the annual reports and CSR/sustainability reports (the main source of information for ATNI's research for this report) reiterated what has already been found in the second and third reports in this series, which include:

few specifically nutrition-sensitive strategy changes to the COVID-19 pandemic;

a strong focus on safety of the workforce, with measures taken in the workplace to prevent infection and support for employees who are affected by the virus;

a focus on donations (including of food), without a clear focus on nutritional quality or how need is assessed (other than through partnering with NGOs).



In many cases, the lack of updated reporting on company websites makes it challenging to assess the current state of play. It is sometimes, therefore, unclear whether changes announced in the first days of the pandemic (such as early action on financial protection for employees) will be temporary or permanent.

Some new issues have come to the fore in the first six months of 2021, since the second report in this series, as identified by ATNI's third-party monitoring, all of which are addressed below:

Equity – or lack of it – is being actively reported on and addressed by some of the companies, particularly those in the United States, where the Black Lives Matter movement is having an influence.

The impact of the second wave in India has been evident to companies with operations there: more protection for employees has been implemented, with a focus on provision of vaccination.

Food sector workers are often highlighted in guidance as being key workers for vaccination purposes, and some of the manufacturers are taking action to facilitate vaccination of their workforce, families and supply chain.

There is an increased emphasis on ensuring the mental health of employees, as so many struggle with the impacts of the pandemic on everyday life.

All companies have been impacted by COVID-19. Annex 3 provides further information on the impact on their bottom line. Some companies have specifically reported on the total expense of what Nestlé describes as 'COVID-related incremental costs', such as new safety protocols, donations and bonuses for frontline staff. For Nestlé this accounted for CHF 420 million (approx. US\$450 million) in 2020<sup>172</sup> and Danone reports that there were €150 million in incremental costs (sanitary, industrial, and logistic extra-costs) in 2020 'directly related to Covid-19 incurred during the year to keep employees safe and ensure business continuity'.<sup>173</sup>

## 4.2 Governance and leadership

**This Category is intended to address the development, implementation and scope of a 'nutrition-sensitive strategy', the management systems governing it, and the reporting against it.**

[“The companies that have shown themselves to be most resilient are often the ones with the most developed long-term crisis planning in place”](#)

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Sharon Bligh, The Consumer Goods Forum

**Findings from earlier reports:** The impacts of COVID-19 on both company strategy and the bottom line were rapidly evident and reported on in the October 2020 report in this series. Almost three-quarters of the companies assessed for that report made public statements about their responses to COVID-19, including some that specifically noted the need to reach vulnerable communities. However, at this stage the statements and reporting focused on temporary, emergency actions (particularly in employee health and donations), rather than on a preventive and longer-term nutrition-sensitive strategy.

Ensuring the resilience of all aspects of what is often a long and complex supply chain (from farmers to retailers) is essential if high-quality foods in sufficient quantity is to continue to reach all families, including vulnerable populations. It was evident early on in the pandemic that large food manufacturers



can play a key role in supporting companies in their supply chain, as without these links in the chain – most of which are SMEs – the system cannot continue to function.<sup>b</sup> ATNI's second COVID-19 report found some examples of support for vulnerable SMEs in the value chain,<sup>174</sup> including PPE provision, COVID-19 health insurance, making it easier for suppliers to interact remotely, and assistance with credit relief and cash flow, particularly in lockdown.

In these early months, reporting was largely limited to reporting on investor web pages, a single page of COVID-19 reporting or ad hoc press releases.

#### **Box 4: Why a nutrition-sensitive strategy?**

A nutrition-sensitive strategy can provide the rationale for action on accessibility and affordability (including donations) of specifically healthy foods, a focus on the nutrition of the workforce, an increased urgency around reformulation and responsible marketing (including of breastmilk substitutes), and renewed commitment to a strongly evidence-based approach to labeling and health claims.

#### **4.2.1 A nutrition-sensitive response?**

In some ways, not much has changed since the second report of the series. Annex 3 shows that COVID-19 continues to impact the bottom line. The easing of lockdown in many countries has meant that the out-of-home sector has rebounded – but e-commerce has continued to flourish (see box 5).

Much of the information provided on the COVID-19 response has continued to be piecemeal. Many of the companies' pages on their websites with information about their initial response to the pandemic have seemingly not been updated since April/May 2020 and others have never included a date. This makes it challenging to work out what (if any) more recent steps have been taken, and whether the measures taken in the early days of the pandemic (such as paid self-isolation) have continued after those first few months. The second ATNI report welcomed, for example, that PepsiCo had established a scientific steering committee to direct its pandemic response, but no further information has been found on the impact of this committee or whether it continues to provide advice. Kellogg noted that as part of its 'global Crisis Management Process', its Executive Committee 'worked closely with medical, regulatory and other experts' to deliver on objectives during the pandemic.<sup>175</sup> ATNI would welcome more public information from all companies on how this kind of consultation is feeding into long-term strategy, and how strategy is being positioned to be explicitly nutrition-sensitive.

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<sup>b</sup> Note that examples of F&B manufacturers' donations that support the value chain are separately dealt with in this report, as has been the case in the other reports in this series (see section 4.4).



### **Box 5: The continuing growth in e-commerce – opportunities and risks**

As is set out in section 3.3 above, it was clear from the earliest days of lockdown that e-commerce would boom, particularly **online food delivery** across different geographies and **improved integration of supply chains** (e-commerce doubled in middle-income countries, according to IFPRI).<sup>176</sup> These trends were highlighted in the very first report in this series and are likely to be here to stay, with repercussions and opportunities for manufacturers' nutrition-sensitive actions into the future. Coca-Cola Argentina, for example, created the Wabi app, which allows small retailers to serve customers safely using online ordering without having physically to open the shop. The app has been rolled out in major cities across Latin America, as well as Kenya, Vietnam and Malaysia.<sup>177</sup>

**Online purchase** of food products rose dramatically over the course of 2020 for many of the companies: online sales in Nestlé grew by almost 50% (reaching 12.8% of total sales),<sup>178</sup> by over 60% in Unilever (9% of total sales),<sup>179</sup> and Kraft Heinz is 5–7 years ahead of its pre-pandemic e-commerce projections.<sup>180</sup> Grupo Bimbo noted that it restructured during the year to move away from channels such as food service that saw decreases in demand and towards e-commerce,<sup>181</sup> doubling the levels of e-commerce over the year.<sup>182</sup>

The trend first noted in the second report of a rise in **new digital platforms has continued, both business-to-business and direct-to-consumer**. This has benefits for supply chains as it can more easily facilitate financial transactions. It also enables consumers within reach of such services to have food delivered more easily – however, the offerings are only available to those with internet access and are often not healthy, with a focus on snack products. These platforms also enable companies to acquire consumer data, providing not only a new channel for sales but also insights into behavior and future product innovation.<sup>183</sup>

The long-term impact of this rise in e-commerce is acknowledged in some companies' risk sections of their recent annual reports. PepsiCo, for example, notes that 'we continue to see a rapid increase in demand in the e-commerce and online-to-offline channels and any failure to capitalize on this demand could adversely affect our ability to maintain and grow sales or category share and erode our competitive position.'<sup>184</sup>

During the consultation for this report, it was noted that headquarters of multinationals have generally let the in-country company decide how policies around COVID-19 are rolled out at country level, with few systems in place to monitor what was happening in-country (Sharon Bligh, CGF). This chimes with ATNI's research throughout this series: the multinationals' websites have a significant focus on where they are headquartered, often with much less information (either on the global or country-level websites) on action in other markets, which was a challenge for the [ATNI report that focused on India, Mexico and Nigeria](#).

Recently published annual reports and CSR reports for 2020 have all included a response to the crisis. Company strategies have clearly successfully pivoted around the challenges posed by the different stages of the COVID-19 pandemic and the attendant consumer trends, riding the initial storm of COVID-19, but without necessarily placing nutrition firmly at the heart of all the changes. These reports make clear that many of the major F&B manufacturers have refreshed their strategies in the light of COVID-19: there are statements about the importance of addressing employee health, growing and streamlining the business, and building resilience to future shocks and climate change. However, the links with nutrition and the impact of COVID-19 are often not explicitly stated or embedded in these new strategic approaches, and there is often a notable gap in information about the impact on



geographies outside the home market or the impact on supply chains. The importance of addressing equity has been acknowledged by several companies – particularly racial diversity and gender balance – but this does not tend to have a specifically nutrition-sensitive slant: how can inequity in nutrition be overcome in the vulnerable communities that the companies serve? (See box 6.)

Companies are acknowledging the new business and materiality risks attendant on COVID-19, but with only limited focus on nutrition-related issues:

PepsiCo Annual Report: 'certain jurisdictions, such as certain states in Mexico, have enacted or are considering enacting new or expanded product labeling or warning requirements or limitations on the marketing or sale of certain of our products as a result of ingredients or substances contained in such products'.<sup>185</sup>

Coca-Cola Hellenic Annual Report: COVID-19 may 'lead to increased corporate taxes and additional discriminatory taxes such as sugar taxes ... as governments look to ... respond to consumer concerns around health and climate change'.<sup>186</sup>

To date (as noted in Report 2 of this series<sup>187</sup>), only one company – Grupo Bimbo – has committed on its website to a price promise to maintain prices across the entire portfolio during the crisis, but as the acute crisis becomes protracted, it is not clear how long this commitment remained in place.<sup>188</sup> An update and report on this ambitious commitment would be welcomed by ATNI.





### **Box 6: Food manufacturers and equity**

As noted in section 3.2 above, (in)equity is a rising concern for consumers, investors and manufacturers alike. Addressing inequities matters for business profitability and there are a range of opportunities for the food industry to act on this. The research for this report found examples of explicit action on this agenda from several companies, which have increased as a focus since the second report in this series and has been evident in annual reporting.

Action to address **equity in the workforce and supply chain** includes a statement by Unilever that it is prioritizing making 'a more equitable and inclusive' society, including 'ensuring that everyone who directly provides goods and services to us earns at least a living wage or income by 2030' and 'spending €2 billion annually with suppliers owned and managed by people from under-represented groups, by 2025'.<sup>189</sup> Mars' Shubh Mint program in northern India works with women and girls 'to reduce vulnerabilities associated with the food, health and nutrition security of women mint farmers and their households, and to strengthen livelihoods practices that will enable a swifter recovery from the COVID-19 crisis', including (with partner NGO CARE) distributing food rations to more than 4,700 households and 'designing infrastructure to deploy soft loans and cash support to most vulnerable households'.<sup>190</sup> There are also examples of companies affirming support for young people seeking employment (through training and apprenticeships), a group that has been particularly badly affected by COVID-19.<sup>191</sup>

There are clear links between **equity and human rights** in the food supply chain, including the right to food, which was already a burgeoning concern for consumers and manufacturers.<sup>192</sup> General Mills' 2021 Global Responsibility Report makes the connection between rights and equity explicit, stating: 'Grounded in our belief that access to food and freedom from hunger are basic human rights, we work to bring about food-secure communities and combat hunger by: Ensuring food access for all – Together with our nonprofit partners, we take aim at inequitable food access and hunger to ensure all members of the community have reliable access to a wide range of affordable foods.'<sup>193</sup>

Several of the companies have made statements and amended risk assessments to reflect the focus on equity, diversity and inclusion, and some manufacturers have come together with other stakeholders on equity issues. For example, Campbell's, Coca-Cola and PepsiCo, with over 100 other US companies from many sectors, signed a joint statement to 'affirm our commitment to promote inclusion, raise awareness, denounce bias and donate' to vulnerable Black and Hispanic communities during the health and economic crisis.<sup>194</sup>

Donations can also have an explicitly equity-orientated rationale, including addressing food insecurity. For example, in the United States, following the death of George Floyd, Kraft Heinz noted that it made 'an immediate \$1 million commitment to support food programs and social justice organizations serving African-American communities most affected in recent months by police brutality and COVID-19'.<sup>195</sup>

Some of the companies are also donating to efforts to achieve vaccination equity, notably to support the global COVAX effort (see section 4.4.2).

Inequity is a global issue and should be addressed across all geographies. Tackling it requires strategic, systemic changes – it is a long-term business imperative, not a short-term corporate social responsibility concern.



#### 4.2.2 Supporting the value chain to ensure healthy food production

The impact of the pandemic on SMEs continues. A survey of mostly small- and micro-sized enterprises undertaken in late 2020 by GAIN found that 98% reported being affected, mainly via decreased sales (75%), difficulty accessing inputs (53%), and difficulty accessing financing (47%).<sup>196</sup> However, impacts for most had decreased, with about a quarter reporting that their business was essentially 'back to normal' when the survey was conducted. This is likely, however, to fluctuate over time as lockdowns (such as in India) are reinstated under successive waves of the pandemic. As IFPRI and others have noted, large manufacturers can play a key role in supporting SMEs in their supply chains through access to credit and other infrastructure to see them through the crisis and taking advantage of the rapid expansion of e-commerce (see box 5).<sup>197</sup>

The annual reports have seen more companies reporting publicly on the process of adapting their finance and other systems to provide support for SMEs. For example, Mengniu's Annual Report notes that the company 'provide[d] support to the partners in the industrial chain who were affected by the Epidemic by providing loans and financial credits, as well as assisting in the arrangement of logistics'.<sup>198</sup> Coca-Cola Philippines partnered with government agencies and micro-finance institutions to set up the Rebuilding Sari-Sarai Stores Through Access to Resources and Trade initiative,<sup>199</sup> supplying loans to 15,000 micro-retailers and distributing PPE, including branded protective panels.<sup>200</sup> During the initial lockdown in Japan, demand for dairy products fell significantly, so Meiji processed more of the raw milk received from suppliers to create storable products (such as dry milk and cheese), to assist dairy farmers and ensure that raw milk did not have to be discarded.<sup>201</sup>

Unilever noted in July 2020 that initial uptake of the €500 million of financial assistance it was offering to SMEs had been low,<sup>202</sup> and there was no update about the level of uptake in the annual reporting. The company does note in its annual report that it 'built a COVID-19 information site for suppliers to share protocols and useful information to keep them running safely' and that support for suppliers included 'three months' salary protection for third-party employees, such as cleaners and security staff'.<sup>203</sup>



## Governance and leadership recommendations

ATNI calls on all the world's major food and beverage companies to take the following actions:

Develop and deliver on a strategy and plan to respond to and recover from COVID-19, including a focus on creating a healthier food environment, particularly for the most vulnerable across all geographies, and assign clear Board-level responsibility for the COVID-19 response and for future pandemic preparedness and operations.

Ensure regular, transparent and comprehensive reporting on the strategic nutrition-sensitive response to COVID-19, to investors and to the public, in annual reports and corporate responsibility reports. This reporting should be both at HQ level and within each of the company's key markets, to enable a better understanding of the translation of the global commitments and practices to specific countries/regions.

Fully support and comply with nutrition-sensitive national and/or international guidance (e.g. from the WHO and UNICEF) during health crises, for employees, consumers and across the value chain.

Consider ways in which the company can play its part to tackle inequity in the food system, including addressing income, racial and gender inequalities, both in the workforce and in the populations reached by the company's products.

Value chain: During crises and as part of the rebuilding of the economy and food system, develop and sustain improved partnerships with (local) supply chains in the long term, to ensure resilience of suppliers. This should specifically include SMEs (e.g. farmers and small-scale grocery vendors), which form such a substantial and essential link in the food system.

### Box 7: Response of investors

Institutional investors have a significant role to play in shaping the global response to the COVID-19 pandemic and to promoting healthy and affordable diets for all, and COVID-19 has been a clear cause of concern to them since the early stages of the pandemic. These investors provide finance to the private sector and are an important stakeholder group to ATNI: ATNI's engagement with investors includes a set of 2020 *Investor Expectations on Nutrition, Diets and Health*.<sup>204</sup> Several initiatives have been launched by investors to address COVID-19.

In March 2020, the Principles for Responsible Investment (PRI), of which several of the signatories<sup>205</sup> to ATNI's *Investor Expectations* are members, outlined seven areas of COVID-19 response action for responsible investors.<sup>206</sup> These range from engaging with companies that are failing to manage the crisis, to publicly supporting economy-wide responses, and are categorized as either short-term crisis management or long-term economic recovery actions.



Also in March 2020, an investor statement was issued, co-authored by two ATNI Investor Signatories (Domini Impact Investments and the Interfaith Centre for Corporate Responsibility) as well as by the Office of the New York City Comptroller. In this statement, 336 investors (among them 30 ATNI Investor Signatories) with \$9.5 trillion in assets recognized that 'the long-term viability of the companies in which we invest is inextricably tied to the welfare of their stakeholders, including their employees, suppliers, customers and the communities in which they operate'. The statement urged the business community to take action in response to the COVID-19 crisis,<sup>207</sup> including providing paid leave, prioritizing health and safety, maintaining employment, maintaining supplier/customer relationships, and ensuring financial prudence.

Following these initial statements, which were addressed to the whole business community, further calls have been issued focusing on more specific topics and at specific sectors (including food and beverage), reflecting some of the specific challenges brought about by COVID-19.

In May 2020, a group of 118 investors with \$2.3 trillion in assets issued a Call for Increased Protections for Meat Processing Workers in response to health and safety concerns for meat processing workers in a number of US facilities.<sup>208</sup> (This continues to be an important safety issue: see section 3.2.1.)

In June 2020, investors sent letters to 11 of the food and beverage manufacturers<sup>209</sup> assessed by ATNI in the second quarterly COVID-19 report and three retailers, asking those companies to take action to promote healthy and resilient supply chains,<sup>210</sup> with many of the recommendations being reflected in the recommendations in this ATNI report. Short-term, crisis-management actions called for include:

- strengthening the **accessibility and affordability** of food products;
- ensuring worker, customer, visitor and vendor **safety** during the crisis; and
- ensuring the quality of **food donations** and incorporating healthy guidelines into company donation policies.

The longer-term, recovery and business strategy actions include:

- developing plans to **strengthen the supply chain** and employing safeguards to anticipate, prevent and mitigate changes in supply and demand during any future pandemic;
- adopting **ethical and socially responsible marketing practices** to ensure that company practices are not fueling **health inequities**;
- establishing and monitoring adequate policies and protocols to **enhance the safety and health and financial well-being of workers**; and
- paying a fair share of taxes to ensure continued investment in the healthcare infrastructure and social safety nets, to prepare for potential future global crises.

A more recent investor call to action was issued in February 2021, focusing on a fair and equitable global response to the pandemic. This was coordinated by the Access to Medicine Foundation and signed by nearly 150 institutional investors with \$14 trillion in assets and outlines the role of institutional investors in ensuring that 'essential COVID-19 tools are developed as rapidly and distributed as widely as possible'.<sup>211</sup>

Note also that a call from the ICCR (and responses from the food companies) on food equity, health and racial justice is discussed in section 3.2.3 of this report.



## 4.3 Healthier products, labeling and claims

This section combines the research on two Categories in the ATNI Framework. ‘Safe and healthier products’ set out to capture the extent to which companies changed their product portfolio, nutrition criteria/nutrient-profiling system or made other changes to prioritize production of healthier products in response to COVID-19.<sup>c</sup> ‘Nutrition labeling and claims’ looked at the extent to which companies work to ensure that nutrition and health claims are safeguarded and that the positioning of new products is not misleading.

**Findings from earlier reports:** It was clear from the early days of the pandemic that consumer concern had risen about the benefits of good nutrition for health, because of the clear links between obesity and poor COVID-19 outcomes and because of the desire to maintain a healthy immune system. By the time ATNI’s research for the second report was conducted in mid-2020, this had translated into increasing numbers of products being developed and marketed as having a positive effect on the immune system or protecting against infection, with this being particularly noticeable in India (Ayurvedic ingredients). COVID-19-precipitated reformulation was focusing on the addition of ingredients said to have a positive effect (such as dairy products, turmeric and added vitamins) but without an accompanying urgency to reformulate to remove fat, sugar or salt. All three reports to date have strongly urged caution about any health claims related to COVID-19, as these can be deceptive.

The third report (on India, Mexico and Nigeria) emphasized the importance of fortification in ensuring that vulnerable groups including children receive all the micronutrients they need for good health, and this was noted as being addressed through government and manufacturer action.

### 4.3.1 The use of labeling and claims in times of crisis

The strong trend, particularly in parts of Asia, towards **products claiming to improve immunity** – such as through the use of Ayurvedic approaches<sup>212</sup> – has been reiterated in recent reporting by many of the companies. New products continue to be developed in India that contain turmeric and other Ayurvedic ingredients, positioned as bolstering immunity. Companies in China are also positioning dairy products as being important for health and immunity, which has bolstered sales – for example, ‘Since the Epidemic, consumers have gained greater awareness of the immunity enhancement properties of yogurt and probiotics drinks, which has stimulated the demand for relevant products. During the period, Mengniu has promptly seized market opportunities.’<sup>213</sup> FrieslandCampina also noted that ‘Due to the coronavirus crisis, the importance of nutritious dairy products has continued to grow in our home markets and in emerging markets. We will continue to innovate and invest in this, independently and – where prudent and relevant – through strategic partnerships.’<sup>214</sup>

The trend towards wellness products is evident worldwide, with many new products being brought to market, including tea with higher-than-usual levels of vitamin C and drinks that claim to have benefits for mental health, such as aiding sleep and providing stress relief.

However, as section 3.1.2 notes, there is still research to be done to build consensus on the benefits of specific nutrients for COVID-19 prevention and treatment and **extreme caution is needed so as not to mislead consumers through marketing that suggests a link to COVID-19 where none has been proven.**

Reports suggest that there are still issues about inappropriate claims. In Italy, over 200 infringements of claims on food supplements were logged during the pandemic to the end of December 2020, all related

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<sup>c</sup> There is currently no evidence that spread of COVID-19 is directly associated with eating or handling food (CDC, ‘Food and coronavirus disease 2019 (COVID-19)’ (31 December 2020) <https://www.cdc.gov/coronavirus/2019-ncov/daily-life-coping/food-and-COVID-19.html> and ATNI’s research did not find any evidence of companies significantly altering their food-safety management systems.



to marketing suggesting that nutrients can prevent or treat COVID-19.<sup>215</sup> In Japan in March 2021, the Consumer Affairs Agency warned companies including food manufacturers against displaying misleading information and claims on products including candy.<sup>216</sup>

#### 4.3.2 Improving the healthiness of products

ATNI's research included looking at whether companies were noting changes to the healthiness of their products in response to COVID-19. Nestlé's recent *2020 Creating Shared Value* report is the only one of the companies that ATNI found to have explicitly acknowledged the impact of the pandemic on efforts to reach targets on **reformulation**: 'We have a gap of 0.5% to meet our commitment to reduce added sugars by 5% by the end of 2020, as our reformulation work slowed down due to COVID-19.'<sup>217</sup> More reporting on this would be particularly welcome from all companies.

**Fortification** of staple foods to address malnutrition (particularly the addition of vitamins, iron and folic acid) continues to be of great nutritional importance as the repercussions of COVID-19 continue to impact on micronutrient availability (see section 3.1.2). More products are being fortified to contain micronutrients – ITC, for example, has launched a new milk fortified with vitamin A.<sup>218</sup> In China, new regulations (introduced in February 2021) now allow for the fortification of a wider range of processed foods – including jelly. This was previously marketed as a confectionary but can now be marketed as healthier because of the fortification.<sup>219</sup> While regulations and standards on food fortification vary by country, ATNI encourages companies to comply, at a minimum, with international guidance on food fortification (Codex and/or WHO),<sup>220</sup> and companies should also comply with national fortification guidelines, which may specify which target groups are the primary focus. In addition, ATNI recommends that companies commit only to fortify products that are healthy and inherently of high quality in addressing undernutrition – companies should avoid placing health claims on fortified products when these do not meet relevant guidance/nutritional criteria.

However, **noticeable by their absence are statements by the companies committing to scaling up resources for fortification** in response to the links between good nutrition, COVID-19 and future risks to public health, including pandemics.



## Healthier products, labeling and claims recommendations

ATNI calls on all the world's major food and beverage companies to take the following actions:

At a time of significant changes in consumer habits, innovate to encourage consumers to make healthier choices and move away from unhealthier choices (for example through development of healthier goods and ensuring that promotional activities including e-commerce focuses on healthier products) and report on how this is achieved.

Further strengthen fortification strategies in line with international and national guidelines to ensure that evidence-based fortified healthy products reach vulnerable populations in need (particularly those most affected by crises) and report on progress, publicly reporting on the extent to which these populations are reached.

Redouble efforts to ensure that health claims (including on fortified food) are evidence-based and do not appear on unhealthy foods. Labeling and claims should follow all appropriate international and national guidance, and do not mislead consumers about the impact of products on immunity, particularly during health emergencies when consumers are most susceptible to inappropriate claims.

## 4.4 Affordability and accessibility

**This Category is intended to address the affordability and accessibility of healthy products, including donations.**

**Findings from earlier reports:** From the start, ATNI has found little indication of companies' commitment to maintaining **affordability**. Grupo Bimbo was the only company to make an early global price promise to keep product prices low, and no equivalents were found during the research into manufacturers in India, Mexico and Nigeria. **Accessibility** (especially in lockdown) has been addressed by many companies through the development of direct-to-consumer online channels – but these do not appear to focus on the provision of healthier products and can exacerbate the digital divide for those unable to use online ordering.

From the very start of the pandemic, the primary route through which companies have taken action to reach vulnerable communities is through **donations, both in-kind and financial**, particularly addressing food insecurity through support for food banks/NGOs or more ad hoc donations of food and essential equipment to key workers in communities local to the companies' operations. Some donations had also been made within the value chain, including support for small retailers and the restaurant sector. However, it was unclear how much had been donated and whether these donations were one-offs or were ongoing, with very limited reporting on the impact on recipient communities.



The research for the second and third reports in this series also found only occasional evidence of companies' commitment to or action on donations of specifically nutritious food. It identified several examples of marketing campaigns in which purchase of products is linked to donations of often unhealthy products to vulnerable groups or health workers.

#### **Box 8: UNICEF's guidance on financial and in-kind contributions from food and beverage companies in emergency response**

UNICEF's guidance on whether to accept donations from food and beverage companies was published in May 2020 in response to the pandemic,<sup>221</sup> and remains just as relevant today. It notes: 'It is important to ensure that any possible financial contributions or CIK [contributions-in-kind] from the food and beverage sector adhere to UNICEF policies, are needs-based rather than donor-driven, guarantee adequate nutritional quality of the diet, and minimize reputational risk to the organizations involved.'

Although the document is written for UNICEF, it includes important recommendations, many of which could be used as guidance by NGOs, governments, and food manufacturers in taking best-practice steps in donations.

'Do not engage in cause-related marketing on foods and beverages.

Foods and beverages high in saturated fats, sugar and/or salt should not be sought or accepted as CIK for distribution.

Other forms of market/consumer facing engagements with food and beverage companies (e.g. high visibility grant contributions, CIK for non-food items or services, joint activities) are highly sensitive and may undermine UNICEF's current programming and credibility in maternal and child nutrition. Any possible engagements such as these should be strictly evaluated on a case-by-case basis, considering potential risks, the company portfolio and sales data.

In line with existing UNICEF policies, companies that manufacture BMS should continue to be excluded from any CIK, funding engagements or co-branded partnerships. Donations of breastmilk substitutes (BMS), complementary foods and feeding equipment, including bottles and teats, should not be sought or accepted for distribution. [For more on BMS donations, see section 4.8.]

UNICEF should continue to advocate for access to nutritious, safe, affordable and sustainable diets during the COVID-19 [sic] and provide guidance to countries.'

#### **4.4.1 Affordability, accessibility – and donations**

The trends seen earlier in the series have broadly continued:

In terms of **affordability**, Grupo Bimbo remains the only company to have made a price promise to keep product prices low – although it is not clear whether this commitment is still in place. Changing the product mix was noted in Tingyi's annual reporting as having been a way to ensure affordability: 'the instant noodle segment resorted to mid-priced noodles to meet the need for cost-effectiveness to accommodate the needs of consumers in lower-tier cities and rural areas'.<sup>222</sup>

**Accessibility** (especially in lockdown) has been addressed by many companies through the development of direct-to-consumer online channels – but these do not appear to focus on the provision of healthier products, and can exacerbate the digital divide for those unable to use online ordering.



**Donations** have continued to focus primarily on donations of food or to nutrition-related organizations, but there are now additional examples of donations of oxygen to health centers and, new to this report, vaccination efforts. The annual reporting of many companies did not provide full transparency on the amounts donated over 2020, but some have set out the total amount, which include some very substantial donations:

Coca-Cola and the Coca-Cola Foundation 'provided more than \$90 million to support COVID-19 relief efforts – benefiting 25 million people in 118 countries'.<sup>223</sup>

General Mills notes that it made more than \$9 million in 'charitable grants' (March–October 2020 only, as reported in the 2021 *Global Responsibility Report*) through the General Mills Foundation.<sup>224</sup>

Grupo Bimbo's annual report notes total donations of 230 million pesos (US\$11.5 million) worldwide, 'benefiting close to 8 million people from the most vulnerable sectors and neighbors from communities close to our 158 work centres'.<sup>225</sup>

Kellogg notes that the company and its 'charitable funds' have donated US\$18 million to COVID-19 specifically to 'hunger relief' efforts globally.<sup>226</sup>

Nestlé notes having made financial and in-kind donations of over CHF 90 million (US\$97 million) across over 80 countries.<sup>227</sup>

PepsiCo's annual report notes that with the PepsiCo Foundation it invested 'more than \$60 million and provide over 145 million meals to hungry families impacted by COVID-19 in 2020, with a special focus on providing nutritious meals for students who usually get meals through school'.<sup>228</sup>

Unilever's in-kind donations of €100 million include food, and also includes products from its hygiene portfolio.<sup>229</sup>

Announcements of commitments for 2021 have begun, including Brazilian food manufacturer BRF, whose commitment of an additional R50 million (US\$10 million) includes more food donations to hospitals and 'initiatives to support vulnerable populations'.<sup>230</sup>

PepsiCo<sup>231</sup> and the Coca-Cola Foundation<sup>232</sup> are the only two companies found in ATNI's research to provide detailed lists of projects specific to COVID-19 that have benefited from donations; PepsiCo's includes links to the recipients but the list is not dated, and the Coca-Cola Foundation's list has not been updated since October 2020.

### **Box 9: Donating to the wider value chain**

Some companies have also donated to organizations that support the wider value chain. PepsiCo, for example, has donated \$2 million to the National Restaurant Association Educational Foundation, which will support the Restaurant Employee Relief Fund and provide job training for women as part of long-term recovery efforts.<sup>233</sup> There are also examples in section 4.6.4 of companies working together to support small retailers, including through donations of PPE.



#### 4.4.2 Financial donations

**The annual reporting of companies has shown a continued trend of financial donations to local, national or international organizations/NGOs.<sup>d</sup>** PepsiCo's list of donations includes contributions to eight societies of the Red Cross: Belgium, China (Hubei), France, Italy, Lebanon, the Netherlands, South Africa and Spain, to support local vulnerable communities.<sup>234</sup> General Mills is among the companies focusing on child hunger with its \$2.5 million in donations including work in Brazil with the Instituto Melhores Dias providing 'nourishing school meals and holistic school-based programs' that reached 47,800 children.<sup>235</sup> Unilever reports donating approximately €50 million to the World Economic Forum's Covid Action Platform, which supports organizations such as UNICEF and the UNHCR.

A new trend since the previous reports in this series is a focus on **financial donations to vaccine development and distribution**, both internationally and at national level.

International donations:

Some of the food manufacturers have announced donations to support COVAX, the program co-led by CEPI (the Coalition for Epidemic Preparedness Innovations), Gavi (the Vaccine Alliance) and the WHO, with delivery partner UNICEF, to ensure equitable, global access to COVID-19 vaccines.<sup>236</sup> The WHO Foundation's acceptance of donations from the food industry has been sharply criticized on social media as being a conflict of interest, but defended by the WHO Foundation CEO on the grounds the donations to the Fund 'do not have strings attached', instead supplying flexible resources to WHO to address the COVID-19 crisis.<sup>237</sup>

The Red Cross Movement, which was the recipient of many companies' national-level donations in the first months of the pandemic, has also received wider support for access to vaccines from Nestlé, which has committed CHF 6 million to the International Federation of the Red Cross and Red Crescent Societies (IFRC).<sup>238</sup>

The Coca-Cola Foundation's Stop the Spread Fund will provide \$2 million for Project Last Mile to support vaccine rollout in eight African countries (Liberia, Sierra Leone, Nigeria, Ghana, Eswatini, Mozambique, South Africa and Tanzania).<sup>239</sup>

National donations:

In Estado de México, a coalition of private sector players, including Grupo Bimbo, is working with government to supporting logistics and infrastructure to vaccinate people aged 60+.<sup>240</sup>

Several of the donations are focused on India, where the latest wave of COVID-19 has been so devastating. For example, the PepsiCo Foundation is partnering with NGO SEEDS (the Sustainable Environment and Ecological Development Society (SEEDS) on a vaccination-awareness program and provision of 100,000 vaccine doses (administered through the local healthcare system).<sup>241</sup>

In Brazil, another country where the impact of the pandemic has been keenly felt in 2021, BRF has donated 'R\$7.6 million to scientific research funds that seek solutions to prevent, diagnose and treat COVID-19.'<sup>242</sup>

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<sup>d</sup> Some donations also go to support value-chain efforts, which are covered in section 4.2.2 rather than in this section, as they focus on financial support for businesses.



### Box 10: Donations to health institutions

Donation of food and essential equipment to **healthcare (and other key) workers and healthcare institutions** remains one of the primary routes for donation. Examples from around the world have been reported in recent annual reports, although, as with other donations, there is often no information as to what extent these donations are of healthy products or whether these initiatives have been extended into 2021.

Examples in China include Mengniu's donations of dairy products to 'more than 10,000 health care institutions and epidemic prevention organizations to provide nutritional support',<sup>243</sup> and Tingyi's annual report notes that it 'developed a coalition of companies that pooled and delivered donations to frontline workers.'<sup>244</sup> In Paraguay, Coca-Cola Paraguay has reaffirmed a commitment to providing 'hydration products' to 12 hospitals in the country for staff and patients (600,000 products have been donated so far)<sup>245</sup> Ajinomoto's Indonesia and Thai affiliates donated products worth around US\$70,000 to 11 hospitals<sup>246</sup> and US\$160,000 to five hospitals respectively.<sup>247</sup> In the UK, Kellogg donated 500,000 servings of food to NHS and key workers.<sup>248</sup>

A specific development in 2021 has been **oxygen donations** in India in response to the well-documented shortage. Mars is providing 404 oxygen concentrators for patients in hospitals<sup>249</sup> and a tweet from ITC noted in May that one of its manufacturing units had supplied 100MT of liquid oxygen to hospitals in Telangana, with more to come.<sup>250</sup> HUL has partnered with Portea Medica and the KVN Foundation in a borrow/use/return model for oxygen concentrators, allowing patients in eight cities to receive oxygen at home.<sup>251</sup>

#### 4.4.3 In-kind donations

The annual reporting has highlighted many more examples of in-kind food contributions around the world throughout 2020. ITC's distribution of 500,000 meals to 'communities in need', in partnership with NGOs,<sup>252</sup> Conagra's donation of over 25 million meals in 2020 to Feeding America<sup>253</sup> and General Mills' support for foodbanks in over 40 countries,<sup>254</sup> PepsiCo's Food for Good partnership, announced in March 2020, is ongoing in 26 US cities, noting that 'our prepacked meals are well balanced and designed to meet USDA's nutrition standards'.<sup>255</sup> ATNI's Global Index recommends that food companies 'develop a policy that excludes brand-level sponsorship of consumer-orientated programs and/or increase transparency to show how the company ensures consumers will receive independent, evidence-based information',<sup>256</sup> which includes branding on donations.

Several of the companies are focusing on donations local to their production facilities. For example, Campbell notes that it has worked with 'small feeding programs in 33 communities where we have operations across North America to donate Campbell product',<sup>257</sup> and Conagra offices in the United States worked with local food organizations to 'rescue' food that was then provided to local food banks.<sup>258</sup> In India, Adani Wilmar notes that it has distributed 'more than 25,000 litres of edible oil and large quantities of food grains' for people living near its factories.<sup>259</sup> However, many of these local donations seem to have been ad hoc and are likely to have taken place through pre-existing relationships between the facilities and the managers of food banks or healthcare centers, with over-production or leftover food being donated. These examples, where reported at all, are often presented as individual 'stories' on company websites, and **no formal, centralized tracking mechanisms were found** during the research. Mars does, however, report on the combined donations from its Mars Food & Multisales sites.<sup>260</sup>



“The COVID-19 pandemic led to increased dependence of populations, particularly the most vulnerable, on food banks and food donations. When non-nutritious foods are donated through these channels, it can put vulnerable populations in a difficult position related to maintaining high diet quality at a time when they have little choice. Tastes for non-nutritious food developed during the pandemic as a result of donated food, particularly for young children, could translate into poor dietary habits even after the consumers are no longer dependent on the donations”

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Stella Nordhagen, GAIN

ATNI acknowledges the importance of emergency food assistance during crises, but also notes that few companies have publicly taken steps to **ensure the affordability of specifically healthy food** during the acute and longer-term economic crisis catalyzed by the pandemic. It is this, not food donations, that will foster systemic change that is required to ensure good nutrition and resilience against future ill-health (including pandemics). In the longer term, what will be of most importance to global health and nutrition is the portfolio of products produced by the manufacturers and the affordability and accessibility of healthy products for all.

See also box 11 on the links between donations and product marketing.

#### 4.4.4 Looking to the future

**It is not clear, from ATNI’s research, how many of these donations will continue, in what form, and how healthy these will be.** For many companies, the initial flurry of donations has slowed (sometimes picking up again in countries such as India where further waves of the virus have been particularly challenging for food security and health). It certainly appears that donations (including through the charitable foundations that many of the manufacturers have) have increased in 2020 in response to the pandemic – but it would be useful to have the figures on COVID-related donations presented in the context of ‘business-as-usual’ annual donations, to see how the amounts donated and where they are distributed have shifted (and will continue to shift) as a result of the pandemic.

The combination of a lack of consistent, public reporting on donations by the company, combined with ad-hoc local donations of food by local factories, continues to make it challenging to quantify donations or understand their impact on the communities they are intended to help.



## Affordability, accessibility and donations recommendations



ATNI calls on all the world's major food and beverage companies to take the following actions:

Commit to a 'price promise' to ensure the ongoing affordability of healthy products for the duration of the crisis.

Develop and deliver on policies for donation of products only if they are of high underlying nutritional quality. Donations should be guided by national/regional guidelines (where these exist) and aligned with UNICEF guidance to governments on private-sector donations. Donations should be delivered where possible through government-authorized channels so as not to establish parallel systems and undermine local markets, and never used as overt, branded marketing opportunities.

Ensure transparency in reporting on in-kind and financial donations (at both HQ and country level) on how: a) decisions are reached (for example, responding to government or NGO requests for assistance, and clear guidance on the healthiness of any donated products), b) where and how donations will be distributed, and c) the expected impact of the donations on expected recipient communities.

Commit to ensuring the continuation of the company's supply chain (including at local level) in order to safeguard accessibility of food.

## 4.5 Responsible marketing

**This Category is intended to capture concerns around general marketing and marketing to children, requiring companies to take particular care to ensure that responsible marketing commitments across all markets are upheld or strengthened during the COVID-19 crisis, especially in relation to children. Note that section 4.8 additionally addresses the marketing of breast-milk substitutes.**

**Findings from earlier reports:** In the first few months of COVID-19, new marketing campaigns were launched worldwide by food manufacturers, reflecting the new realities of pandemic life. The second report in this series noted that lockdown may have accelerated the shift from traditional forms of marketing to online marketing, the impacts of which on children are particularly challenging to understand, trace and regulate. The report also noted a number of examples of inappropriate marketing by some of the 39 companies researched.<sup>261</sup>

Indications are that online marketing increased during lockdown, as people are more confined to their homes: Coca-Cola, for example, noted that 'Lockdowns triggered a digital buying boom in 2020. To support the surge in e-commerce, we ... boosted investment in digital promotions.'<sup>262</sup> **Children are especially vulnerable<sup>263</sup> to any increases in digital marketing because of the impact that it has on purchase and consumption of unhealthy products and because of the data gathered on (often young) consumers.**<sup>264</sup> To date, however, PepsiCo remains the only one of the companies



researched by ATNI that was found to have explicitly reiterated its commitment to responsible marketing during the pandemic.<sup>265</sup>

The very significant **growth in e-sports and online gaming** are also clearly seen as an opportunity by the brands, with viewers for e-sports expected to grow at 9% a year.<sup>266</sup> Nestlé, for example, launched its first campaign on Twitch (for KitKat)<sup>267</sup> in 2020, aimed at gaming audiences over 16. However, 21% of Twitch users are aged 12–17,<sup>268</sup> so real care must be taken with these new platforms if responsible marketing commitments are to be realized.

One of the areas of concern among many NGOs is the association of unhealthy brands with physical activity for children, and there have been examples of this found over the past months, such as Nestlé's Milo brand reportedly 'engag[ing] more children to keep active at home',<sup>269</sup> with a Milo campaign in the Philippines in 2021.<sup>270</sup>

It is not just children who are particularly vulnerable to marketing during the COVID-19: marketing campaigns have also **leveraged adult consumers' fears about the pandemic**, as several reports have noted. For example, a study of social media advertising in New Zealand in February to May 2020 (published in March 2021) found that a quarter of all social media advertising during this period referenced COVID-19, drawing on themes including feelings of community support, highlighting brand-related isolation activities and a message that 'consumption helps with coping'.<sup>271</sup> Reports by both the NCD Alliance<sup>272</sup> (September 2020, with a further iteration due in 2021) and the Global Health Advocacy Incubator (November 2020)<sup>273</sup> reiterate these concerns and give more examples from around the world.

Companies are, however, responding to new realities, with Ajinomoto Indonesia, for example, releasing an advertisement about cooking and sharing meals as a way to connect with loved ones, though with a nutrition slant: 'keep in touch with delicious nutritious meals'.<sup>274</sup> Connecting brands with key workers has also been observed, with Kellogg in the United States launching a commercial to thank those in the food sector for keeping the food system going.<sup>275</sup>

Responsible and evidence-based marketing is also particularly important for health claims at a time when people are most concerned about their health (see also sections 3.3 and 4.3), and companies should use particular caution when advertising their products.

[“\[Responsible marketing is\] important due to consumers' increased focus on health during the pandemic and the lack of clearly authoritative sources and “correct” information on what could be done to prevent COVID amid an ongoing rise in misinformation. In this position, consumers are particularly vulnerable to marketing”](#)

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Stella Nordhagen, GAIN



### **Box 11: Links between donations and marketing**

Since the research for ATNI's 2020 report, more examples of the direct linkage of brand marketing and donations have come to light. Many of these gather data on consumers through these campaigns – for example, requiring information to be entered on websites – which will then be used for targeted marketing in the future.

Examples of this include campaigns in which people who have bought a specific branded product are encouraged to log on to a website and the company will then donate either the same product (such as Danone's Actimel partnership with Irish social enterprise FoodCloud<sup>276</sup>) or provide a small financial donation (such as a Yoplait (General Mills) campaign to donate 10c per product to Feeding America).<sup>277</sup>

Other examples include a campaign in which for every order placed via the Uber Eats app from a participating restaurant, Feeding America received a donation from Coca-Cola to provide meals to vulnerable communities,<sup>278</sup> and Nestlé Malaysia ran a Ramadan campaign in which 10% of the 'proceeds' on the purchase of MILO products on e-commerce site Shopee were donated to seven charities.<sup>279</sup>

## **Responsible marketing recommendations**



ATNI calls on all the world's major food and beverage companies to take the following actions:

Reiterate and establish/reinforce commitments to responsible marketing during the crisis, to avoid marketing unhealthy food and drink to children, caregivers and other vulnerable groups, particularly ensuring that all forms of digital marketing and promotion are covered by the commitments (including educational platforms).

Commit not to use marketing that could be interpreted as leveraging consumer concerns specific to the pandemic, such as unsubstantiated health claims or encouraging comfort eating during lockdown.

Note that marketing of breastmilk substitutes recommendations appear in section 4.8.



## 4.6 Protecting employees and promoting healthy lifestyles

**The Category is intended to capture employee health and wellbeing, value-chain health and wellbeing, and consumer/community (educational) programs.**

“Covid has exposed how essential the people working in the food system are, particularly those who grow, pack and transport our food. How these workers are being protected and compensated has come to the fore in the United States”

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Lucy Sullivan, Feed the Truth

**Findings from earlier reports:** As was evident from the very earliest days of COVID-19, the pandemic catapulted the health, safety and wellbeing of the workforce to the forefront in an unprecedented way, faced with a combination of illness from the virus, self-isolation or quarantine, lockdowns (and attendant caring responsibilities) and mental-health issues. Between them, the 39 companies in the scope of this report employ over 2 million people worldwide and many of the companies were quick to react (as the second and third reports summarize). Many went beyond mandatory safety measures to protect their workforce, with some explicitly prioritizing vulnerable workers. By the third report, mental health seemed to be an increasing focus. However, efforts remained primarily on safety and there were very few examples found of nutrition-specific support for the workforce. Vaccination in the food sector was on the radar (see section 4.6.3). but only as a theoretical future possibility, so was not reported on by individual companies.

Evidence was also found of initiatives being implemented by some major manufacturers in the value chain, including support for SME suppliers and smallholders, with initiatives identified to support farmers, restaurants, street vendors and small retailers.

Promoting healthy lifestyles has taken on new meaning and urgency in a COVID-19 context. The 2020 research found that some manufacturers had implemented education/public-awareness measures, pivoting some existing programs to account for the pandemic and creating new ones such as online materials for use in school closures and promoting healthy eating.

### 4.6.1 Employee health

Ensuring employee health and safety remains the most obvious concern for food manufacturers. There have been well-documented failures in some parts of the food sector to protect employees across the supply chain, most notably in the meat-processing industry, as noted as early as the first report in this series.<sup>280</sup> However, almost all manufacturers include at least some information on their websites and/or their annual reporting about measures being taken to protect their workforce.

A particular and ongoing shortcoming of many companies' reporting, which was very evident in the research for the third report and again in mid-2021, is that the publicly available information on the measures being taken is often not updated regularly, if at all. Some companies' webpages on employee health seem not to have been updated since the early days of the pandemic, meaning that it is not possible to understand which of the initial support measures remain in place and how long-term these initiatives will be – will the move to flexible working or extended insurance packages be permanent, for example, or has it already ended? The second report voiced concern that it was unclear whether the new support would lead to improved pay and higher standards for often poorly paid frontline workers in the longer term, and this concern still stands: companies should be held to account on improvements made and retracted.



However, ATNI has continued to identify many different measures taken by manufacturers, which, in combination, would be good practice in this area – these are presented in figure 3, along with some examples. As the figure shows, nutrition of the workforce has not surfaced in the research as being a priority action for the food manufacturers. Another noticeable omission from the list is **ventilation**, which did not make a specific appearance in the research for this report, but which has emerged as an essential aspect of COVID-19 prevention, given that the virus is now confirmed to be airborne. Many of the companies have made minimal updates on their websites to the list of actions taken on employee health since mid-2020, which may partly explain this omission.





**Figure 5: Measures to protect health of the workforce in the food and beverage sector**

	<p><b>In the workplace</b></p>	<ul style="list-style-type: none"> <li>▪ Minimizing contact through social distancing, including staggering the start/end of shifts and break times, minimizing meetings and refreshments, and installation of screens.</li> <li>▪ Provision of face masks/shields/hand sanitizer on-site.</li> <li>▪ Provision of health screening (taking employee temperatures).</li> <li>▪ Sanitizing of surfaces.</li> <li>▪ Rapid testing of employees. An example: Unilever shared its 'Sample framework for Covid-19 proactive testing plan' for manufacturing sites with its suppliers,<sup>281</sup> combining reactive diagnostic testing with proactive population screening.</li> <li>▪ Contact tracing. An example: General Mills' reports in its Global Responsibility Report 2021 that 'Our layered protections, combined with robust contact tracing and exclusion protocols, helped to prevent the virus from spreading within our facilities.'<sup>282</sup></li> <li>▪ Restricting work-related travel. An example: Conagra notes that 'We have restricted business travel to business- critical projects only, and in cases where travel is necessary. It is not permitted internationally.'<sup>283</sup></li> <li>▪ Supporting employee mental health Examples: This has extended significantly since the second report in this series: see section 4.6.2.</li> <li>▪ Assistance for migrant workers. An example: in the face of the latest COVID-19 wave, Adani Wilmar notes that 'like last year, we will provide workers with accommodation within the factory premises if the need arises', providing food facilities and other basic necessities if required.<sup>284</sup></li> </ul>
	<p><b>Financial and livelihood protection</b></p>	<ul style="list-style-type: none"> <li>▪ Salary protection (or a proportion of it) for a limited period of time to protect employees from market disruption or being unable to work due to self-isolating, quarantining, suffering from COVID-19 or caring for sick family members, etc. An example: Unilever guaranteed salaries for three months for 'employees, contractors and those who manage or work on our sites'.<sup>285</sup></li> <li>▪ Suspension of redundancies. An example: BRF committed to suspend lay-offs until June 2021.<sup>286</sup></li> <li>▪ Roll-out of benefit programs to relieve financial pressures, e.g. for medical care and education. An example: Nestlé India announced during the recent severe wave of the virus in the country that it will provide two-years of base salary to the family of employees who have died from COVID-19.<sup>287</sup></li> <li>▪ Insurance cover for employees. An example: Danone's health insurance program Dan'Cares has been expanded to all parts of the world, covering the workforce and immediate family members.<sup>288</sup></li> <li>▪ Additional bonus/compensation for essential/frontline/onsite workers.</li> <li>▪ Assistance with child-care due to school/nursery closures An example: Kellogg notes that 'In recognition of their efforts, we also have enhanced benefits for front-line employees including ... child-care alternatives, so they can care for themselves and their families'.<sup>289</sup></li> <li>▪ Covering the cost of COVID-19 testing for employees. An example: Ajinomoto North America is covering the cost of testing through its employee insurance plan.<sup>290</sup></li> </ul>
	<p><b>Flexible working</b></p>	<ul style="list-style-type: none"> <li>▪ Flexibility in working conditions. An example: Mars notes that among the range of solutions put in place are 'supporting child/dependent care, expanding flexible working policies ... and enabling more flexibility in holiday carry over'.<sup>291</sup></li> <li>▪ Support for working from home and online access. An example: Reckitt (formerly RB) provided financial support for employees to buy equipment to enable them to work from home.<sup>292</sup></li> </ul>
	<p><b>Country-specific efforts</b></p>	<ul style="list-style-type: none"> <li>▪ There are also country-specific efforts – for example, after the Chinese New Year in 2020, Master Kong (the parent company of Tingyi) arranged for employees to return to the factory on a migrant express train, bearing the expense of hotel accommodation during quarantine.<sup>293</sup></li> <li>▪ As noted above, however, it is often unclear to what extent many of these initiatives remain in place.</li> </ul>



#### 4.6.2 COVID-19 and mental-health support

Mental health in the food system is increasingly surfacing as a significant issue (see also box 3) as the pandemic ebbs and flows. In the consumer goods sector, as organizations such as the Consumer Goods Forum have noted,<sup>294</sup> companies are taking action on employee mental health to build workforce resilience, setting up or extending digital health and other wellbeing programs to address COVID-19-related anxiety.<sup>295</sup> Among the food manufacturers researched for this report, efforts have noticeably increased since mid-2020, with many companies now highlighting action on mental health in their reporting – with many, such as Yili,<sup>296</sup> making general statements about placing greater emphasis on mental health. Some set out their actions in more detail:

**Counseling:** Mars' Associate Assistance Program (extended in 2020 to 58 new countries) includes up to eight confidential free counselling sessions for associates (employees) or members of their household.<sup>297</sup> In India, which has been so badly affected by a second wave, Hindustan Unilever Limited (HUL) reports that it is 'running an employee assistance programme with 100+ trained counsellors and activating 500+ mental health champions'.<sup>298</sup>

**Online support:** Tingyi's parent company Master Kong notes that it recognizes the 'possible negative impact of the epidemic on employees' psychological health', organizing online training and staff care videos.<sup>299</sup>

**Stress management:** Mondelēz has 'developed a virtual care pack to provide help and guidance on managing wellness and working remotely', including managing stress and improving work–life balance.<sup>300</sup>

**Active breaks:** In late 2020, Nestlé established two pilot programs: a digital platform to encourage (and destigmatize) regular breaks from working and an app with ideas for physical activity challenges with work colleagues.<sup>301</sup> Mars has developed a 'Meet Smarter' tool that is used to shorten default meetings, encouraging 5–10-minute breaks each hour.<sup>302</sup>

**Recovery days:** Reckitt (formerly RB) notes that in 2020 'we paused global operations on two occasions to let people rest and recover in a stressful year, as well as ensuring our people have access to assistance programmes and other tools and resources to support individuals and build resilience'.<sup>303</sup>

#### 4.6.3 Supporting employee vaccination

Since the last report in this series was published, the issue of vaccination – and prioritization of the food sector – has become far more urgent, particularly in countries where vaccines are in short supply and vaccination rates remain very low (see section 3.1.1). Some companies in the wider food sector are stepping up to help provide the vaccines – for example, supermarkets in the United States are planning to provide on-site clinics (Aldi)<sup>304</sup> and provide \$200 extra pay to those who get vaccinated (Lidl).<sup>305</sup> This approach can build on consumer/employee trust in the company to help to overcome vaccine hesitancy.<sup>306</sup> Ensuring that employees can take time off work for vaccination in this sector is particularly important for those on low incomes or in informal employment.

Some of the companies researched for this current report note that they will pay for or provide vaccination among their employees (although it is not always yet clear how this will be delivered). Danone and Mondelēz are taking a global approach, with Danone offering up to six hours of paid leave for vaccination and covering costs of vaccination in countries where it is not offered for free,<sup>307</sup> and Mondelēz committing to covering the cost of the vaccine for all employees in all countries 'if not already paid for by their government or healthcare plan'.<sup>308</sup>

There are country-specific actions, too. In April 2021, Unilever Philippines completed purchase agreements of COVID-19 vaccines for all employees and their qualified dependents as part of its



COVID-19 response program.<sup>309</sup> Ajinomoto Foods in North America is 'working to assist all of our employees wishing to be vaccinated access to the vaccine'<sup>310</sup> and Coca-Cola Beverages Philippines (the local bottling arm) announced a free vaccination program for 10,000 employees and their families.<sup>311</sup> Suntory will provide vaccination for 19,000 employees and their families in Japan, on working time, specifying that paid leave will be granted if there is an adverse reaction.<sup>312</sup>

The need for vaccination of the workforce in India has been very acutely felt, with several companies reporting a response. HUL will facilitate and, if necessary, pay for vaccination of around 300,000 of its employees (and families), suppliers and associates, and in late April was discussing partnerships to deliver this with local hospitals.<sup>313</sup> By the start of June 2021, Mars reported that it had provided 'vaccination sponsorship' for over 6,000 employees, contractors and family members in India.<sup>314</sup> PepsiCo India has also committed to cover the costs of vaccination for employees and spouses in the country.<sup>315</sup>

Additionally, companies are encouraging vaccination even where it is being offered by the government: for example, the chief executive of Unilever in the UK notes that vaccination will be encouraged and, although this will not be mandatory, testing will be compulsory for those who are not vaccinated.<sup>316</sup>

#### **4.6.4 Supporting health in the value chain**

The second report in this series included a few examples of support for health of workforces in the value chain, one of which, Nestlé India's provision of COVID-19 insurance to distributors (part of its Nestlé Suraksha program), initially established for three months, has continued and recently been extended for an additional year.<sup>317</sup> Other action by companies in India to address the recent devastating COVID-19 variant include HUL noting that it has 'extended Covid insurance for 30,000+ outer core employees and third party work force working in the front line'<sup>318</sup> and ITC reports 'providing support for vaccination to value chain partners in the eco-system across [India]'.<sup>319</sup>

#### **4.6.5 Healthy lifestyles**

The research for this report has uncovered more COVID-specific healthy lifestyle initiatives that reach the wider community. Examples were found of branded health-education campaigns: in communities around Grupo Bimbo factories in seven Latin American countries, for example, educational messages about COVID-19 prevention were placed in local schools, as part of the Bimbo Is With You health campaign.<sup>320</sup>

The Mondelēz International Foundation's (MIF) partnerships in several countries have supported healthy eating and active lifestyle programs. For example, CSR Ukraine developed an initiative encouraging children and families to do physical activity together at home and post updates on social media, and an initiative with Save the Children Mexico designed a digital strategy to encourage physical activity, healthy eating and COVID-19 knowledge, as well as offering psychosocial support for children. It is not clear whether these initiatives were branded or were simply supported by MIF.<sup>321</sup>

Section 4.5 on responsible marketing also contains a couple of examples of physical activity campaigns for children. Caution has been urged by stakeholders during the consultation about the appropriateness of any food company (particularly unhealthy brands) being involved in health campaigns of any sort, due to concerns that consumers will connect health campaigns with unhealthy brands. ATNI's Global Index includes that companies should 'commit to, or demonstrate, that all programs exclude product or brand level branding and/ or increase transparency to show how the company ensures consumers will receive independent, evidence-based information'.<sup>322</sup>

Although not part of an explicitly nutrition-sensitive approach to engagement, ATNI notes that some companies have portfolios beyond their food brands and have used these to engage consumers. Unilever, for example, which has many hygiene product brands, launched the Hygiene and Behaviour



Change Coalition in March 2020 with the UK government, which had reached more than 1 billion people in 37 LMICs with its hygiene products by April 2021. However, this is not linked with its nutrition portfolio,<sup>323</sup> and does not fall under ATNI's research into nutrition-sensitive engagement.



## Protecting employees and promoting healthy lifestyles recommendations

ATNI calls on all the world's major food and beverage companies to take the following actions:

Commit to put in place policies and plans to safeguard and support health, wellbeing and nutrition of employees (including migrant workers), including when the food system comes under stress. This should go beyond general statements at HQ level to set out country-specific and culturally appropriate responses, clearly indicating how the response develops over time.

Report on a regular basis, clearly dated, on efforts made to support the health, wellbeing and nutrition of employees (including migrant workers), taking into account the latest scientific evidence and including: fair and equitable remuneration (reflective of the increased risks faced by some essential workers); safeguarding of employment during periods of lockdown/illness/self-isolation; and vaccination prioritization for the most vulnerable. This should distinguish temporary initiatives from long-term support that is now embedded within working standards to improve resilience.

Commit to and report on efforts made to support health of workers throughout the value chain (including SMEs), both during crises and as part of the rebuilding of the economy and food system.

Work with public-health and NGO partners when implementing education or public-awareness programs on health/nutrition, whether for employees, the value chain or (unbranded) for consumers and publicly report on the activities implemented.

## 4.7 Engagement

**This Category is about responsible and transparent engagement with government on COVID-19 and broader stakeholder consultation and partnership, such as with industry associations and NGOs.**

(Note that engagement on food donations is covered in section 4.4 above.)

**Findings from earlier reports:** Initial findings found that global food and beverage manufacturers were outspoken in supporting governments in addressing COVID-19, working to keep operations and supply chains moving during lockdown and to ensure that governments in countries in which they operate designate their operations as 'essential' services. Much of this engagement was through industry associations. It was unclear whether companies' approach to government engagement impacted on nutrition-related policy.



#### 4.7.1 Lobbying governments: influencing policy

Companies' engagement with and through industry associations has continued (section 4.7.3 below), but ATNI's research uncovered fewer examples of companies reporting on their engagement with national governments specifically on COVID-19-related topics over the past few months, as the immediate crisis subsided. Nevertheless, companies and industry associations have remained highly active in lobbying throughout 2020 and the first half of 2021. Despite overall lobbying spending falling in the United States in 2020,<sup>324</sup> lobbying expenditures by 'Food Processing & Sales' industry actors increased from \$24.5 million in 2019 to \$27.3 million in 2020, according to data from US Senate Office of Public Records and synthesized by OpenSecrets.org. PepsiCo spent \$1.1 million on lobbying in the United States in the first quarter of 2021 alone.<sup>325</sup>

While lobbying data is less readily available outside the US market, ATNI has found several other examples of companies seeking to influence government responses to COVID-19 elsewhere in the world. For example, in Mysore, India, during the state-wide lockdown curfew in April 2021, KMF Nandini found that it was struggling to sell the required milk volumes in the time permitted for sales. It requested that the state government extend the time permitted to sell milk in its Nandini Milk Parlours and Outlets<sup>326</sup> and this was granted, albeit only until 8pm, not 10pm as the company had requested.<sup>327</sup> Lobbying specifically on vaccination is also now in evidence: in Japan, the Suntory president was one of 22 business leaders to call publicly on the government in late April 2021 to abandon 'outdated thinking' and reform its COVID-19 vaccination program.<sup>328</sup>

Stakeholders worldwide are concerned that companies could use the COVID-19 crisis to shape the policy environment in the longer term, according to a survey carried out by the NCD Alliance in May–July 2020 – for example, by lobbying to keep certain regulatory suspensions permanent, and by actively lobbying to influence the recovery agenda and government stimulus packages in their favor.<sup>329</sup>

A positive example is provided by Mars. Its (undated) website is taking a broad view of COVID-19 recovery, stating that it did not believe that the 'industry categories in which we operate require broad category-specific bailouts' and instead 'encourag[ing] governments to focus economic assistance packages to support general economic recovery and those businesses hardest hit by the crisis, that have been closed by government mandates and where employees' jobs have been negatively impacted'.<sup>330</sup> In addition, ATNI found that the company also lobbied in support of 'additional resources for food and nutrition benefits programs during COVID' in the US in early 2021.<sup>331</sup>

In addition, corporate lobbying has been rising significantly up the agenda of institutional investors,<sup>332</sup> including investors in the food and beverage sector. In October 2020, for example, the Interfaith Center on Corporate Responsibility (ICCR), alongside six prominent investors, engaged 10 companies (all assessed in the ATNI Global Index) on their lobbying practices in relation to tackling obesity and NCDs, receiving responses from each and engaging eight in further dialogue on the matter<sup>333</sup> (see also box 7).

In the second report in this series, ATNI noted the clear need for companies to commit to lobby governments only on nutrition and food issues when it is in support of measures that are beneficial to wider public health, including through industry associations. To this end, ATNI commends Nestlé's engagement with Carnstone, a consultancy and one of the key organizations behind the development of the [Responsible Lobbying Framework](#) (RLF),<sup>334</sup> launched in June 2020, on strengthening its approach to lobbying.<sup>335</sup> The RLF establishes the principles and practical steps that organizations should take to ensure their lobbying is transparent, accountable, consistent, and aligned with the public interest. ATNI strongly encourages other companies to follow Nestlé's example, to help ensure that their lobbying is consistent with public health objectives and that they can be held accountable, whether this is related to COVID-19-related issues, recovery agendas, or measures to address malnutrition.



#### **4.7.2 Supporting government efforts to address the ongoing impact of COVID-19**

ATNI's research has found further specific examples from 2020 of companies supporting and working with governments, both at national and sub-national level, to address the impact of COVID-19. For example, when Ukraine entered lockdown and routes to market were blocked, Unilever's corporate affairs lead in the country 'work[ed] with stakeholders in the industry and business associations' (including the European Business Association and the American Chamber of Commerce in Ukraine) and ensured that the company was put on a national list of 'critical infrastructure' companies permitted to continue operations during lockdown.<sup>336</sup>

In China, Mengniu's reporting notes that it supported the government's 'Nutrition and dietary advice on preventing and recovering from COVID-19' and also that it supported the Food, Nutrition and Health Industry branch of the National Association of Health Industry and Enterprise Management' in advocating for milk consumption as part of a 'Glass of Milk a Day Keeps Chinese People Healthy'.<sup>337</sup> At a state level, in Minnesota, United States, General Mills reports that its GoodWorks marketing team "worked with the Minnesota Department of Human Services to develop a campaign intended to boost enrolment" in the US Supplemental Nutrition Assistance Program (SNAP).<sup>338</sup>

ATNI encourages companies to continue to actively support and work with governments to use their positions and resources to address the impact of COVID-19.

#### **4.7.3 The response of industry associations**

Many of the companies included in this report are members of industry associations, which not only act as powerful voices representing industry's collective interests in the policymaking arena but are also important conduits for developing and sharing best practices among members and encouraging them to act together in a certain direction. ATNI's Framework for this series of reports included researching actions by food industry associations.

This is particularly the case in a time of crisis such as COVID-19, during which some associations have undergone a resurgence, given their increased relevance to companies seeking to navigate an unfamiliar and ever-changing business and regulatory landscape. For example, in the US, the Consumer Brands Group (lobbying arm of one of the main industry associations for the packaged foods and beverage industry, the Consumer Brands Association) increased its membership by a third in 2020, with companies such as Campbell returning to its ranks. Its revigorated growth has largely been attributed to its success 'in keeping the industry together in responding to the Covid challenges' and successfully lobbying to secure 'essential' designation for the industry's workers, lifting weight restrictions for trucks and extending hours-of-service for drivers, for example, to keep industry going despite lockdowns.<sup>339</sup>

##### **Lobbying by industry associations**

Throughout the earlier stages of the pandemic, food and beverage industry associations around the world lobbied extensively to have their industry classified by governments as 'essential' to enable them to continue operating through lockdown, underlining their importance to food security, societal welfare and the economy. While many succeeded in this regard, they have nevertheless had to continue this work, with their attention now turned to lobbying governments to prioritize their workforce for vaccination to ensure continuity of production in the face of rising absenteeism caused by COVID-19.

For example, in November 2020, 15 industry associations representing various parts of the food, beverage and consumer packaged goods (CPG) industry sent a letter to President Trump urging health officials to prioritize the industry in the second phase of vaccine allocation;<sup>340</sup> the Consumer Brands Association sent letters to health officials in 41 states requesting the same.<sup>341</sup> Similarly, early in 2021, Abrafrijo, a major trade association for meat producers and processors, lobbied the Brazilian government for its industry to be added to priority lists for immediate vaccination.<sup>342</sup>



Of particular concern is evidence of some prominent trade associations continuing to lobby actively against measures to address obesity throughout the pandemic, despite the documented links between obesity and adverse COVID-19 outcomes.

The American Beverage Association lobbied both Houses in opposition to 'potential initiatives to impose a tax on sugar-sweetened beverages' in the first quarter of 2021.<sup>343</sup> In April 2021 it was highly active alongside PepsiCo and Coca-Cola in maintaining a 2018 law in California preventing its cities and counties from imposing new taxes on sugary drinks.<sup>344</sup>

The Food & Drink Federation, the UK's main trade association for the food and beverage sector, has voiced strong opposition to the government's new advertising restrictions to help tackle childhood obesity, a measure partly introduced in light of COVID-19,<sup>345</sup> and continues to advocate against taxes on unhealthy foods and drinks and restrictions on promotions of these products.<sup>346</sup>

In Mexico, employers' association COPARMEX reacted strongly against legislation to ban the sale of foods high in fat, salt and sugar to children under 18, calling it 'an obstacle to commercial freedom'.<sup>347</sup>

### **Sharing intelligence and best practice**

Trade associations also work to galvanize their members into acting together and move collectively in a certain direction. This is done through conducting market research and sharing this intelligence among their members, identifying and sharing best practice, and actively encouraging members to adopt their recommendations. Encouragingly, COVID-19 has led a number of prominent trade associations to further emphasize the urgency and critical strategic importance of focusing on nutrition and public health among their members:

The Consumer Goods Forum (CGF)'s Collaboration for Healthier Lives initiative commissioned a study assessing its members' positive health and nutrition interventions, such as in-store promotion, reformulation or portion-size reduction, encouraging members to consider the food 'environment' rather than simply relying on educating consumers or increasing awareness, and providing practical steps to developing such programs.<sup>348</sup>

Food Industry Asia commissioned Asia-wide research assessing consumers' changing attitudes to health and nutrition in their diets, highlighting the need for its members to ensure that they offer sufficient healthy products.<sup>349</sup>

The US-based industry association Food Marketing Institute conducted a study of consumers, finding a higher demand for 'food as medicine',<sup>350</sup> as well as a report exploring industry initiatives focusing on meeting consumer health needs.<sup>351</sup>

Food Drink Europe has encouraged its members to put particular focus on healthy products in light of changing consumer attitudes.<sup>352</sup>

The World Sustainable Business Council for Sustainable Development (WBCSD) has initiated a call to action among its members 'to address this crisis and support the critical role of business'. As part of this, it has developed an online repository of best practice on employee health and business recovery; developed the 'Vital Supply Chains' project convening members, partners and experts to mobilize business leadership to mitigate food risks from COVID-19; and provided analysis and guidance to help to ensure a transformation to a sustainable future.<sup>353</sup>



## Engagement recommendations

ATNI calls on all the world's major food and beverage companies to take the following actions:

- Support and follow government and international guidelines during health crises and develop appropriate partnerships with the public sector to both safeguard (nutritious) food supply in emergencies and help address the negative impacts of COVID-19 where possible.
- On food/nutrition-related topics, include efforts to tackle undernutrition as well as obesity (known to be a risk factor for worse COVID-19 outcomes), only lobby in support of policies that are beneficial to public health, ensure that lobbying positions are grounded in independently peer-reviewed science, and report fully on all engagement with government.
- Actively support government efforts to address the COVID-19 pandemic and its consequences, especially in relation to nutrition and health.
- Monitor the lobbying activities of industry associations to ensure that, even during a public health crisis, they are lobbying responsibly and in the public interest, and harnessing the power of their members to help address the crisis.

## 4.8 Infant and young child nutrition

**This Category is specific to companies that manufacture products for infants and young children – both breast-milk substitutes (BMS) and complementary foods (CF) – looking at the extent to which companies are adhering to and reinforcing commitments to the International Code of Marketing of Breast-milk Substitutes and all subsequent relevant World Health Assembly (WHA) resolutions ('The Code').**

Note: For this COVID-19 initiative, ATNI monitored the websites of the companies included in the 2021 BMS/CF Marketing Index – Abbott, Danone, Feihe, FrieslandCampina, Kraft Heinz, Mengniu, Nestlé, Reckitt and Yili – most recently in June 2021, to check for responses specific to COVID-19.

**Findings from earlier reports:** In the first few weeks and months of the pandemic, some mothers, caregivers and health professionals were uncertain about whether breastfeeding was safe. There was swift reassurance from governments, NGOs and international organisations such as WHO and UNICEF that breastfeeding remains safe and is highly beneficial. Nevertheless, COVID-19 had disrupted breastfeeding services. Compliance with the International Code of Marketing of Breast-Milk Substitutes<sup>354</sup> (and subsequent relevant World Health Assembly resolutions, including WHA 69.9, collectively known as The Code) was therefore noted as being as important as ever under the pressures of COVID-19. However concerns were almost immediately raised that The Code was being violated. All three reports in this series noted examples of alleged breaches, raising concerns about inappropriate marketing and donations of BMS products, both internationally and regionally, and indicating increased donations of BMS in Mexico and India.

ATNI's research found that, while a few of the companies noted that breastfeeding remained safe, only one of them had taken the opportunity to emphasize that breastfeeding remained best and none of the



companies' websites included an explicit restatement of commitment to The Code in the context of COVID-19.

At the time of writing, in mid-2021, **most of the companies that produce BMS have still failed to explicitly and prominently reiterate the primary importance of breastfeeding in the context of COVID-19 on their websites.** As a minimum, this information should be clearly included on all company and brand websites.

There are examples of such statements, however. Danone's Aptclub FAQs, for example,<sup>355</sup> note: 'Considering the benefits of breastfeeding and the insignificant role of breastmilk in the transmission of other respiratory viruses, the mother can continue breastfeeding, while applying all the necessary precautions, subject to medical advice'. Reckitt brand Nutramigen also has COVID-19 sections reiterating that the benefits of breastfeeding outweigh any potential risks.<sup>356</sup>

Statements not only promoting breastfeeding but emphasizing its safety should be highly visible on the site and **regularly updated to reassure mothers and caregivers that developing evidence still shows that breastfeeding is best.** Currently the websites that do highlight the safety of breastfeeding in COVID-19 do so in a context of understanding of the virus being in an early phase. In reality, more is now known that reinforces this early understanding. In the early days of vaccination efforts, some countries suggested that breastfeeding women should not receive the vaccine – but these fears have now been allayed. Evidence suggests that it is safe and may even provide protection to infants through antibodies in breastmilk; ATNI found no information on this on the companies' websites.<sup>357</sup>

This report does not repeat findings on examples of Code violation from ATNI's previous reports in this series, but concerns have continued. A March 2021 study by maternal and child nutrition NGO Alive & Thrive reviewed promotional materials and activities from nine BMS companies in 14 countries (Burkina Faso, Canada, China, India, Indonesia, Kenya, Laos, Malaysia, Myanmar, Pakistan, Singapore, The Philippines, United States, and Vietnam) and assessed the official reporting data from the Philippines (January 2019 to July 2020).<sup>358</sup> It suggested that BMS companies are 'capitalizing on fear related to COVID-19 by using health claims and misinformation about breastfeeding' (including using 'immunity claims to respond to fear of transmission') and that 'donations and services were used to harness the public sentiment of hope and solidarity'. Its findings are worrying: there were 291 reported violations of The Code in the Philippines during the first few months of COVID-19, more than four times the number reported in the whole of 2019.

ATNI recently published two in-country BMS/CF marketing studies, which assessed the extent to which companies market their products in line with The Code within two LMICs: [Mexico](#)<sup>359</sup> and [the Philippines](#).<sup>360</sup> While not specifically designed to assess baby food companies' responses or action throughout the pandemic, both country studies were undertaken after the onset of COVID-19. These studies further mirror the findings of the online searches for this report: company violations of The Code have continued throughout the pandemic as marketing has become largely digitized, with a broad outreach and limited regulation. Various incidences of non-compliance<sup>e</sup> to The Code were found across the two studies and were attributed to six of the companies in ATNI's [2021 BMS/CF Marketing Index](#)<sup>f</sup>

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<sup>e</sup> Incidences of non-compliance are counted based on observed and not reported findings, although the latter are also described within the in-country reports.

<sup>f</sup> The BMS/CF Marketing Index is an assessment of the largest baby food companies' compliance with the International Code of Marketing of Breast-milk Substitutes and all subsequent relevant World Health Assembly resolutions. The in-country studies comprise one element of the research for this Index and is based on the 2017 NetCode Toolkit for monitoring the marketing of BMS; the other research component entails an analysis of corporate policies, management systems and disclosure.



(Abbott, Danone, FrieslandCampina, Kraft Heinz, Nestlé and Reckitt<sup>9</sup>) as well as other companies whose BMS and CF products were found marketed in each country. The majority of the incidences of non-compliance in both the Philippines and Mexico related to media advertising (on television, radio channels and online media outlets including websites and various social media platforms) as well as point-of-sale promotions (i.e. price discounts and other incentives to purchase) largely observed on online retail sites (e-commerce sales of baby food in Mexico almost doubled between 2019 and 2020<sup>361</sup>).

Restricting advertising and promotions of BMS and ensuring that complementary foods are properly marketed is essential. Screenshots of examples are provided in the Alive & Thrive article<sup>362</sup> of manufacturers making claims in advertising that formula is important to babies' 'immunity', regarded as 'an indirect reference to COVID-19', and such claims are in violation of The Code.

ATNI's research for this report found that some of the BMS companies' COVID-19 specific pages in fact promote the use of their BMS products rather than reiterate the importance of breastfeeding. This was the case with the Similac website (an Abbott brand) where a pop-up appears when visiting the COVID-19 specific page, promoting a reward scheme including formula samples and savings on BMS products.<sup>363</sup> These promotions are in direct contravention of The Code. Such membership schemes or clubs go against The Code in that they also encourage contact between the company and mothers/caregivers. Similarly, direct one-to-one provision of medical/nutrition advice usually offered as part of such memberships (several examples of which are given in the second report in this series) are not allowed under the Code.

Given its ubiquity and reach, social media can be particularly challenging for authorities to control and a difficult medium for stakeholders to monitor – for example, there are examples of brand ambassadors promoting BMS products on Instagram and other platforms, which is a violation of The Code.<sup>364</sup> Membership schemes, brand ambassadors and nutrition advisors are not specific only to the COVID-19 era, but demonstrate that the **companies are operating in a business-as-usual mode, rather than doing all they can to protect and support mothers to breastfeed in the particularly difficult circumstances that COVID-19 presents.**

Donations by manufacturers of all types of BMS, as well as bottles and teats, have also been highlighted as problematic throughout the pandemic. The Alive & Thrive article cited above notes that 'donations to health workers to show solidarity' were made and that some companies partnered with charitable organizations.<sup>365</sup> BMS donations lead to increased use of and dependency on these products and a consequent reduction in breastfeeding. Any donations must be made strictly in line with The Code. WHA Resolutions clarify that in instances where children require BMS in the healthcare system then BMS should be purchased not donated,<sup>h</sup> and this was reiterated by UNICEF and others in March/April 2020.<sup>366</sup>

The research for this report has also found that **lockdown may have impacted the manufacturers' ability to audit compliance with their own marketing policies.** Nestlé's 2020 CSV report notes

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<sup>9</sup> Three other companies that are also part of the 2021 BMS/CF Marketing Index (Feihe, Mengniu and Yili) are not part of the in-country studies as they do not market their products in either the Philippines or Mexico. Additionally, the Philippines is not an official market for FrieslandCampina and Kraft Heinz and therefore the two companies were excluded from the Philippines study, in which ultimately only four ATNI companies were assessed.

<sup>h</sup> WHA Resolution 47.5 states that governments must take measures 'to ensure that there are no donations of free or subsidized supplies of breast-milk substitutes and other products covered by the International Code of Marketing of Breast-milk Substitutes in any part of the health care system' and WHA Resolution 63.23 emphasizes 'the need to minimize the risks of artificial feeding, by ensuring that any required breast-milk substitutes are purchased, distributed and used according to strict criteria': UNICEF et al., *Infant and Young Child Feeding in the Context of COVID-19* (Brief No. 2 (v1), 30 March 2020) <https://www.unicef.org/media/68281/file/IYCF-Programming-COVID19-Brief.pdf>, and UNICEF, *Response to COVID-19: Guidance Note on Financial Contributions or Contributions In-kind from Food and Beverage Companies* (Version 2, 29 April 2020) <https://www.nutritioncluster.net/sites/nutritioncluster.com/files/2020-05/COVID-Guidance%20on%20financial%20contributions%20and%20contributions%20in%20kind%20by%20FB.pdf>



that: 'To ensure BMS marketing standards are upheld throughout Nestlé, we self-assessed compliance through internal and external audits in 18 countries in 2020. This is lower than the 30 countries usually covered, but many audits could not take place in 2020 due to the COVID-19 restrictions.'<sup>367</sup> Such limitations must be attended to and rapidly overcome, because avoiding marketing that does not adhere to The Code is more, not less, important during the pandemic.

A finding in the second report in this series, which still stands, is that none of the companies' websites explicitly reiterate their commitment to The Code in the context of COVID-19. Now, as then, **ATNI calls on companies to make this commitment and to act on it – both during the immediate crisis and beyond.** Furthermore, the pandemic has highlighted the need to ensure robust corporate policies are in place to avoid any violation of The Code and protect infant and young children's health in all circumstances. It is therefore imperative that every manufacturer of formula and foods for infants and young children has a policy that **fully** aligns with the provisions of The Code, covering **all** areas of marketing,<sup>i</sup> and that this policy applies to **all** formulas intended for infants and young children from birth up to 36 months of age, including growing-up milks,<sup>j</sup> as well as complementary foods. Companies should further ensure effective management systems are in place to fully uphold and implement this policy even in times of crises. (For further details on the gaps in policy and practice among the largest baby food manufacturers and relevant recommendations to achieve full Code compliance, see the [2021 BMS/CF Marketing Index](#).<sup>368</sup>)

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<sup>i</sup> These broadly include: advertising on all forms of media including online and digital platforms; point-of-sale promotions both in physical stores and online retail sites; marketing within the healthcare system and to healthcare workers creating conflicts of interest; product labeling, which undermines breastfeeding and/or encourages the use of BMS, among other forms of marketing.

<sup>j</sup> Almost half of the total incidences of non-compliance identified across both ATNI in-country studies related to the marketing of growing-up milks (also known as toddler milk, they are milk products intended for children from one year of age and above. Where these milks are marketed as suitable for feeding young children up to the age of three, they are considered as BMS under The Code definitions). ATNI's 2021 BMS/CF Marketing Index highlights that all companies whose BMS marketing policies were assessed continue to exclude these products from their policies.



## Infant and young child nutrition recommendations

ATNI calls on all the world's major food and beverage companies to take the following actions:

Emphasize explicitly and prominently on their corporate and all BMS-brand websites that breastfeeding in the context of COVID-19 not only remains safe but that this is best for babies.

Explicitly support WHO recommendations on breastfeeding in any health crisis.

At all times, and including during emergencies such as pandemics, adhere strictly to the International Code of Marketing of Breast-milk Substitutes, including: a) not to donate any BMS products at all to health care systems, and to donate to institutions outside health care systems (e.g. orphanages or food banks) only as provided for by The Code; b) not undermine through their marketing or other communication the scientific evidence and guidance of authoritative health agencies (such as UNICEF and WHO), and c) not to use marketing that could be interpreted as fueling the concerns of mothers around the safety and benefits of breastfeeding.

Strengthen management systems and have effective procedures in place to ensure full compliance with The Code at all times, particularly during emergencies such as pandemics.



## 4.9 Future emergency response

The recommendations provided in sections 4.2–4.8 cover the range of measures for companies to take, both as the immediate reaction to the pandemic but also to take nutrition forward into the new COVID-19 future.

The figure below presents a more focused set of emergency recommendations, which companies could use in any future crisis: the immediate response to be taken in the first weeks across all the areas set out in this ATNI COVID-19 Framework.

**Figure 6: Immediate nutrition response by the food industry to a (COVID-19 or similar) pandemic crisis**

### Category A:

#### Governance and leadership

- ✓ Deliver and regularly report on the nutrition-sensitive, equitable recovery and resilience strategy/ plan across all key markets
- ✓ Fully support and comply with national/international nutrition-sensitive guidance on addressing the crisis
- ✓ Work closely with value-chain partners to ensure resilience of the food system

### Category C:

#### Affordability and accessibility

- ✓ Maintain prices for healthy products for all consumers during the crisis
- ✓ Donate only healthy products and only through authorized channels
- ✓ Ensure continuation of the supply chain to safeguard accessibility of food

### Category E:

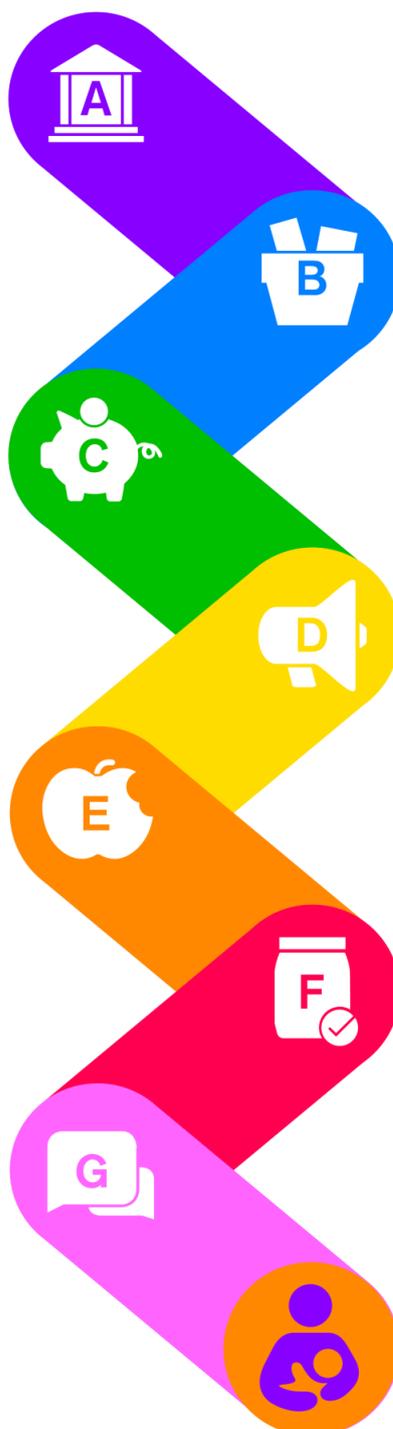
#### Protecting employees and promoting healthy lifestyles

- ✓ Safeguard all employees' health and nutrition and support wellbeing of workers and suppliers throughout the value chain

### Category G:

#### Engagement

- ✓ Intensify work with industry associations to address the nutrition impacts of the crisis collectively



### Category B:

#### Safe and healthier products

- ✓ Ensure continuation of production of healthy (including fortified) foods during crisis

### Category D:

#### Responsible marketing

- ✓ Do not use marketing that leverages consumer concerns about the crisis
- ✓ Do not use marketing that targets vulnerable groups such as children

### Category F:

#### Nutrition labelling and claims

- ✓ Ensure that health claims do not appear on unhealthy food and do not mislead on immunity

### Infant and young child nutrition

- ✓ Emphasize explicitly and prominently that breastfeeding in the context of COVID-19 not only remains safe but that this is best for babies.
- ✓ Explicitly support WHO recommendations on breastfeeding in any health crisis
- ✓ Adhere strictly to the International Code of Marketing of BMS and all subsequent relevant WHA resolutions



## 5. Closing remarks, next steps and learning for ATNI

Even before the COVID-19 pandemic, the extent of all forms of malnutrition globally was a clear indication that the food system needed to be improved – both on a daily basis for those with little or no access to affordable healthy food and on a long-term basis for everyone, through the unsustainable toll it takes on the planet. Everyone agrees that we must build back better – but this is not enough: we must also build back fairer,<sup>369</sup> tackling the inequities that have been embedded within the system.

“Dedicated investments to address the disruptions in the food systems resulting from national policy responses to the COVID-19 crisis are needed. But even in the midst of crisis, opportunities exist to innovate and “build to transform”. This is essential in order to lay the foundation for an inclusive, green, and resilient post-crisis recovery”

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António Guterres, UN Secretary General<sup>370</sup>

Governments have taken steps to underpin the resilience of food systems – as discussed for India, Mexico and Nigeria in the third report in this series. But the private sector, too, is taking action, and it is this that is set out in more detail from ATNI's research in section 4 of this report.

We stand at a crucial point in history: the chance to reshape the food system to prioritize the health of the world's vulnerable populations as well as the health of the planet, to prepare for the future pandemics that will inevitably come, and deflect the current trajectory away from an unsustainable and highly uncertain future.

“Covid is a symptom of underlying stresses that will lead us to more shocks – whether disease, conflict, climate or financial – and we have to be prepared for that”

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John McDermott, CGIAR (launch event for IFPRI's 2021 Global Food Policy Report)

The world's major food and beverage companies can play a key role in this transformation and there are, as all the reports in this series have shown, many examples of good practice – but it is regrettable that, to date, much of that best practice has not been emulated across the board. **ATNI hopes that this report and its recommendations (as set out in each chapter) will help companies to provide and promote good nutrition for all, during the immediate crisis of COVID-19 and far into the future.** In addition, it can provide valuable insights to NGOs, investors and governments.

Even without COVID-19 focusing the attention of the world on food production and food security, 2021 would be a crucial year for nutrition. In September 2021, the UN is holding the first Food Systems Summit (UNFSS), which aims to launch bold new actions to transform food systems as a whole, delivering progress on all 17 SDGs. Then, in December, the postponed Nutrition for Growth summit will be held, which will secure new nutrition commitments from governments, donor agencies and research funders, UN agencies, civil society organizations, academia, and private sector actors across five areas, namely health, food, resilience, data-driven accountability, and nutrition financing. These are a chance to discuss and act on the challenges facing global nutrition, including the significant exacerbation of malnutrition seen under COVID-19.



This report is a launch pad for what comes next. In the next few months ATNI will:

- share the report, findings and recommendations, within ATNI's networks, including with food and beverage companies in ATNI's indexes and with ATNI's investor signatories;
- share and discuss the findings and recommendations through country-specific webinars, e.g. in India and Mexico, following up on the in-depth country assessments in the third COVID-19 report; and
- follow up with consultations with companies and other stakeholders to process the learning and bring it into future ATNI tools and Indexes.





## Annex 1: Consultation on the final report

ATNI's approach is regularly to consult with experts on research methodologies and we were able, on this occasion, to turn to some of the organizations who contributed to the initial COVID-19 Framework to ask for their views on the draft recommendations.

Eight organizations provided feedback, for which ATNI is very grateful:

Sharon Bligh – Health and Wellness Director, The Consumer Goods Forum

Doreen Hashemi – Private Sector Development Adviser, Nutrition Policy Team, Foreign, Commonwealth & Development Office (FCDO)

Uduak Igbeka – Senior Associate and Team Lead, Scaling Up Nutrition: Business Network in Nigeria

Jo Jewell – Nutrition Specialist (Child Overweight and Obesity Prevention) Nutrition Section, UNICEF

Frances Mason – Senior Nutrition Advisor, Save the Children UK

Stella Nordhagen – Senior Technical Specialist, GAIN

Edwin Seah – Head of Policy & Public Affairs at Food Industry Asia (FIA)

Lucy Martinez Sullivan – Executive Director, Feed the Truth

The feedback was positive, insightful and constructive. Some quotes from the individuals consulted also appear in the text, with their permission.

The final recommendations appear throughout section 4. These recommendations remain the responsibility of ATNI, not of those who contributed to the consultation.



## Annex 2: Companies included in the research

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

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



## Annex 3: Companies and the bottom line

This table provides financial information about many of the companies that have been included in the research for the second and final reports in this series. This list does not include all the companies: it is restricted to companies included in ATNI's Global Index 2021 and additionally excludes BMS-only manufacturers and those with no publicly available financial reporting. (Note that Annex 2 provides the full list of 39 companies.)

The information in this table has been drawn from annual reports and financial and investor reports in the public domain, as accessed by ATNI researchers between March and June 2021. The 'Comments' column summarizes the impact of the various repercussions of COVID-19 on sales, costs, profit and loss throughout 2020, as described by the companies themselves in their reporting.

Company	HQ	# of employees	% revenue change full-year 2020 Jan-Dec organic net sales (unless otherwise stated)	Comments
Ajinomoto <sup>371</sup>	Japan	32,500	-3.3* (April-Dec)	This was due to continued decline in sales of restaurant and industrial-use products mainly in Seasonings and Foods and Frozen Foods as a result of lockdowns and other measures in conjunction with the COVID-19 global pandemic. Sales of home-use products increased due to the expansion in at-home dining demand.  Business profit increased 19.9% year-on-year, or ¥16.6 billion to ¥99.9 billion, owing to the effect of increased sales of home-use products and lower expenses due to a reduction in marketing and associated activities in Seasonings and Foods and Frozen Foods during the lockdown and stay-at-home periods
Arla <sup>372</sup>	Denmark	11,800	+1*	Strong brand-led growth and the success of their transformation and efficiency programme 'Calcium' through supply chain efficiencies, optimised marketing spend and reduced expenses due to many office employees working from home, offset the impact of COVID-19 on the foodservice sector and falling global commodity markets to deliver strong financial performance.
BRF <sup>373</sup>	Brazil	90,000	+18*	A positive commercial execution in 2020, coupled with greater operating efficiency, were sufficient to offset higher production costs and the non-recurring expenses to prevent and fight against the effects of COVID-19.
Campbell <sup>374</sup>	USA	18,100	+7	Revenues grew due to boost in Meals & Beverages and Snacks reflecting a continued increase in demand as at-home food consumption. Gross margin performance was impacted by the benefit of supply chain productivity improvements and cost savings initiatives, as well as improved operating leverage and favorable product mix, partially offset by higher supply chain costs related to COVID-19 and cost inflation.



Coca-Cola <sup>375</sup>	USA	86,200	-9	Overall decline driven by significant declines in away-from-home channels, which represent approximately half of the company's business. Sparkling soft drinks declined 4%, while juice, dairy and plant-based beverage declined 9% (with solid performance for some brands in North America). Prioritized core brands, with Coca Cola Zero sugar experiencing 4% volume growth.
Conagra <sup>376</sup>	USA	18,000	+11.1 (May 2020 – Feb 2021)	Significant growth in each of the company's three retail segments (frozen, snacks, and staples) due to augmented at-home demand due to COVID-19. This increase was partially offset by the pandemic's negative impact on the Foodservice segment as well as a temporary supply chain disruption due to adverse weather. High net sales and increased productivity offset input cost inflation, higher transportation costs, and COVID-19-related expenses.
Danone <sup>377</sup>	France	100,000	-6.6*	Out-of-home channels took a hit due to lockdowns, especially in Europe, Latin America and Africa. Infant formula sales in China through cross-border channels decreased due to the ongoing border closure with Hong Kong and travel limitations with mainland China. On the other hand, e-commerce accelerated significantly in 2020.  Danone's recurring operating income reached €3,317 million in 2020. It includes a negative effect from €150 million incremental costs (sanitary, industrial, and logistic extra-costs) directly related to COVID-19 incurred during the year. To mitigate these headwinds, Danone stepped up its efforts on efficiency and cost discipline, especially in the second half of the year.
Ferrero <sup>378</sup>	Italy	37,000	+1.5	Experienced revenue growth in the USA and other western markets including Germany, France and Italy; as well as growth of iconic brands such as Nutella, Kinder Bueno and chilled products.
FrieslandCampina <sup>379</sup>	Netherlands	23,800	-1.4	Hit hard by declines in foodservice and out-of-home-business, compounded by falling milk prices, resulting in considerably lower operating profit. Therefore cut marketing/overhead budgets and began restructuring. Also shifted a portion of its salesforce from foodservice and out-of-home to the retail channel, where it had been growing. Also devoted more attention to digital and e-commerce channels, resulting in significant revenue growth in these areas.
General Mills <sup>380</sup>	USA	35,000	+4	The company estimates that changes in consumer behavior resulting from COVID-19 increased full-year net sales growth by approximately 3 percentage points. Adjusted operating profit of \$3.0 billion increased 7% in constant currency, primarily driven by higher net sales, partially offset by higher Selling, General and Administrative Expenses, including higher administrative and media expenses.
Grupo Bimbo <sup>381</sup>	Mexico	133,000	+13.4*	Sales increased mainly due to favorable price mix, strong volume performance and FX rate benefit. Operating income grew 24.4% reflecting the strong sales performance, lower cost of sales and lower general, restructuring and integration expenses.



Kellogg <sup>382</sup>	USA	31,000	+6	Benefited significantly from elevated demand for food at home brought on by the COVID-19 pandemic. Throughout the year, the company made significant investments in overtime pay, safety and sanitation supplies and protocols in its manufacturing facilities, distribution centers and across the sales organization. In order to meet the elevated demand for its products amidst stay-at-home guidelines and travel restrictions around the world, the company increased production, focused on fewer items, and invested in its employees, warehousing labor, and transportation capacity.
KDP <sup>383</sup>	USA	26,000	+5.0	<p>Coffee Systems experienced growth in K-Cup coffee pods for at-home consumption and strong double-digit growth in brewers, which more than offset the significant decline in away-from-home consumption due to weaknesses in the office coffee channel, as many companies shifted to a work-from-home model during 2020. Sales in the e-commerce channel were very strong, as consumers shifted purchases to the online channel. Packaged Beverages experienced a net benefit from strong in-market execution, driven by net sales and market share growth in the majority of the segment's beverage portfolio.</p> <p>Beverage Concentrates experienced a significant decline in net sales due to the fountain foodservice component of the business. Latin America Beverages experienced limited growth in sales volumes, driven by reduced consumer mobility and tourism in Mexico.</p> <p>Meanwhile, the company sought to reduce costs by reducing marketing expense, given the current COVID-19 landscape, which has impacted the effectiveness and return on marketing investments and reduced other discretionary costs, such as travel and entertainment expenses.</p>
Kraft Heinz <sup>384</sup>	USA	38,000	+6.5	Sales increased, driven by sustained growth momentum in retail, partially offset by ongoing weakness in foodservice.
Meiji <sup>385</sup>	Japan	10,600	-5.3	<p>The food segment was impacted negatively by changes in consumption trends, especially their confectionary business. Fresh and fermented dairy business and processed food businesses were largely unaffected.</p> <p>Operating profit increased, however, by 'controlling promotion expenses and other costs'.</p>
Mengniu <sup>386</sup>	China	38,000	+10.6	The company benefited greatly from increased health-consciousness of consumers and their heightened association in China of dairy with immunity, leading to strong growth in its room temperature liquid milk and chilled liquid milk segments. It expanded its product mix in this regard and launched new products capitalizing on this trend. In addition, it developed new retail channels, including e-commerce platforms, O2O home delivery service, online fresh food shopping platforms, community group purchase and WeChat social groups.
Mondelēz <sup>387</sup>	USA	80,000	+2.8*	Experienced a significant increase in demand and revenue growth in certain markets as consumers increased their food purchases for in-home consumption. Results were



				<p>particularly strong in modern trade (such as large grocery supermarkets and retail chains) and e-commerce, and especially for categories such as biscuits. Other parts of its business were negatively affected by mandated lockdowns including emerging markets with a greater concentration of traditional trade (such as small family-run stores) as well as world travel retail (such as international duty-free stores) and foodservice businesses. In the second half of the year, demand grew in both developed and emerging markets as the negative impacts of COVID-19 subsided and a number of key markets returned to higher growth. During the second quarter of 2020, higher operating costs were incurred primarily for labor, customer service and logistics, security, personal protective equipment and cleaning. In the second half of 2020, spending in these areas was significantly less but still above pre-Covid levels.</p>
Nestlé <sup>388</sup>	Switzerland	291,000	+3.6	<p>Saw strong performance in the Americas, as well as in the vegetarian/plant-based categories, coffee and in the Nestlé Health science with demand for products that support health and immunity. Dairy saw high single-digit growth, based fortified affordable milks and increased home-cooking, while prepared dishes also had strong performance during lockdowns. Confectionery and Water saw decrease in sales reflecting impact on out-of-home consumption. E-commerce sales grew by 48.4%, reaching 12.8% of total Group sales.</p> <p>In 2020, COVID-19-related incremental costs were CHF 420 million, including expenses for bonuses paid to frontline workers, employee safety protocols, donations and other staff and customer allowances. Around CHF 260 million of these costs impacted underlying trading operating profit, partially offset by savings such as travel expenses. In addition, the Group absorbed costs of CHF 170 million related to staff and facilities made idle due to lockdown measures. Overall COVID-19-related costs decreased in the second half of the year, as movement restrictions eased.</p>
PepsiCo <sup>389</sup>	USA	267,000	+4.3	<p>Ended the year strongly, with its global beverage business having accelerating while its global snacks and food business remained resilient in the fourth quarter.</p>
Suntory <sup>390</sup>	Japan	40,210	-9.3*	<p>In Japan, the Group worked on strengthening core brands with a focus on water, coffee, and sugar-free tea categories, but sales volume dropped due to the continued effects of COVID-19. Second lockdowns in Europe also harmed sales of beverages significantly.</p> <p>Despite efforts to cut costs (for example in ingredients and, marketing), profit fell due to overall declines in revenue.</p>
Tingyi <sup>391</sup>	China		+9.1*	<p>The instant noodle business benefited greatly during lockdown, especially during first half of the year. This returned to normal levels in the second half, while beverage business recovered after a slight decline in first half. Introduction of new 'sugar-free' RTD teas and</p>



				functional drinks appealing to a health-conscious middle class contributed to this growth.
Unilever <sup>392</sup>	UK/ Netherlands	155,000	+1.3	<p>Strong performance in retail foods due to increased at-home consumption in North America and Europe, while the overall Food Service business declined 30%. Strong performance in Hellmann's (with the Stay In(spired) campaign), and Knorr and Ben and Jerry's (collaboration with Netflix). The Vegetarian Butcher grew over 70%. E-commerce grew by 61%, as demand was captured in online channels, and represents now 9% of Unilever's revenues.</p> <p>Profits fell due to impacts from out-of-home channel closures, higher operational costs due to COVID-19 and higher commodity costs in second half of the year. As such, marketing was cut back in the first half, and increased it in second.</p>
Yili <sup>393</sup>	China	59,000	+6.5	The company benefited greatly from increased health-consciousness of consumers and their heightened association in China of dairy with immunity.



## Annex 4: Selected guidance and reports

### December 2020

**EIT Food**, *COVID-19 Impact on Consumer Food Behaviours in Europe* (1 December 2020)<sup>394</sup>

This report is the result of a survey conducted in September 2020 with 5,000 consumers across 10 European countries – Finland, France, Germany, Greece, Italy, Spain, Poland, Sweden, Romania and the UK – and a short summary of country-specific impacts is provided for each.

Main trends highlighted are:

- 1 People shop differently and consume more than before (with net increase in consumption in almost every food category).
- 2 People plan more and pay more attention to what they buy (with special attention to local provenance, freshness, packaging, and value).
- 3 People enjoy cooking more, there has been a rise in household mealtimes.

The report also suggests trends that are likely to survive beyond the pandemic: enjoying food and having a wide variety will matter more, as will cooking skills and equipment and having time to cook; there will be greater priority for accessible food stores and access to food at affordable prices, and to nutritional knowledge, healthy foods and using food to control weight; and people plan to buy more local food and reduce unsustainable packaging and food waste.

**GAIN, SBN and WFP**, *Impacts of COVID-19 on Small- and Medium-Sized Enterprises in the Food System: Results of a Second Online Survey, November 2020* (exact publication date not provided)<sup>395</sup>

This survey of SMEs in the food system in 14 countries was undertaken in October/November 2020. It received 327 responses, mostly from small or micro-sized enterprises.

98% of respondent SMEs reported being impacted by the pandemic, mainly via decreased sales (75%), difficulty accessing inputs (53%), and difficulty accessing financing (47%).

86% reported changing production volumes (generally decreasing them) and 69% had changed product sales prices.

However, impacts for most have lessened, with about a quarter reporting that their business was essentially 'back to normal'.

### January 2021

**WBCSD**, *WBCSD's COVID-19 Response Program: Vital Supply Chains Issue Brief* (7 January 2021)<sup>396</sup>

The objective of this 25-page *Vital Supply Chains* brief is to guide companies through the disruptions and systemic risks arising from COVID-19, including specific recommendations for businesses. It includes an analysis of the short-term impacts of COVID-19 on food supply chains, using a multidisciplinary methodology based on a PESTEL (political, economic, social, technological, environmental, legal) framework.

Resilience is key: 'To better prepare for future shocks, companies must change and extend their view of long-term resilience to anticipate and prepare for all future scenarios, minimize the impact of the shocks that do hit, and recover more quickly from them. Business action must embed resilience more deeply.' The report looks at what resilience means, how it can be implemented, and at what cost. Another key point in this brief is that a more enabling regulatory environment will enable companies to 'build forward better'.



**FAO, UNICEF, WHO and WFP, *Asia and the Pacific Regional Overview of Food Security and Nutrition 2020: Maternal and Child Diets at the Heart of Improving Nutrition* (20 January)**<sup>397</sup>

This report provides an update on progress towards 2030 targets at regional and country level in the Asia and Pacific region. 1.9 billion people in the region were unable to afford a healthy diet, even before the COVID-19 outbreak and the damage it has caused to economies and individual livelihoods. Higher prices for fruits, vegetables and dairy products have made it nearly impossible for poor people to achieve healthy diets, the affordability of which is critical to ensure food security and nutrition for all. The effects of the pandemic are predicted to be especially dramatic for mothers and children.

**WFP and UNICEF, *COVID-19: Missing more than a Classroom* (28 January)**<sup>398</sup>

This report from the UNICEF Office of Research – Innocenti and the WFP highlights the impact of school closures due to COVID-19: more than 39 billion in-school meals have been missed globally, meaning that over 370 million children worldwide have missed about 40% of school meals which they depend on. In addition, 24 million schoolchildren are at risk of dropping out of school due to the pandemic and there has been a 30 per cent overall reduction in the coverage of essential nutrition services including school feeding, micronutrient supplementation, and nutrition promotion programs in LMICs.

## February 2021

**CGIAR (C. Béné et al.), *Impacts of COVID-19 on People's Food Security: Foundations for a More Resilient Food System* (20 February)**<sup>399</sup>

This CGIAR COVID-19 Hub discussion paper assessed 337 documents published January–December 2020, covering 62 countries (Africa, Asia, Europe, Oceania and the Americas), that address the impact of COVID-19 on the food security of different food system actors.

Findings include:

- there is still 'a relatively poor understanding (both quantitatively and qualitatively) of the actual impact of the pandemic on people's food security and nutrition';
- the aspect of food security that has been most affected is (physical and financial) accessibility, but that 'there is no clear evidence that the availability of food has been affected beyond some initial disruptions due to panic buying; and there is not enough information to provide robust conclusions about the effects of the pandemic on the utilization of food (safety or quality)';
- the impact of the pandemic on nutritional status is 'still poorly documented but expected to be substantial in the long run'; and
- there are indirect impacts on wellbeing, 'especially in relation to domestic violence as well as voluntary or involuntary exposure to the virus'.

Major conclusions include: 'Overall, food systems "resisted" the shock and no major episodes of severe food shortage were observed. This resilience of the food systems came, however, at great cost, with the majority of the systems' actors having to cope with severe disruptions in their activities. At the same time, a group of actors was able to take advantage of the crisis; those are the grocery stores and supermarkets which made billions of dollars in profits in 2020, thus raising questions about the best way that part of these profits could be redistributed or used to cover some of the costs that the crisis inflicted... [I]t should also be kept in mind that a large part of that resilience resulted simply from the special status of the larger actors as "essential services," which allowed them to continue operating while many other economic sectors had to shut down. This apparent resilience was also built at the cost of hundreds of thousands of smaller or informal food system actors who disappeared during the crisis.'



## March 2021

**Alive & Thrive** (C. Ching et al.), 'Old tricks, new opportunities: how companies violate the International Code of Marketing of Breast-Milk Substitutes and undermine maternal and child health during the COVID-19 pandemic' (1 March)<sup>400</sup>

This academic paper by Alive & Thrive identifies marketing tactics of BMS companies since the start of the COVID-19 pandemic by reviewing promotional materials and activities from nine companies in 14 countries. Eight qualitative themes emerged that the report suggests indicate companies are 'capitalizing on fear related to COVID-19 by using health claims and misinformation about breastfeeding'. Other promotional tactics such as donations and services were used to 'harness the public sentiment of hope and solidarity'.

Notably, there was a sharp increase of reported violations in the Philippines since the pandemic: 291 during the first months of the outbreak compared with 70 in all of 2019, corroborating the thematic findings.

**CGF**, *Supporting Vulnerable Communities in the Wake of COVID-19* (2 March)<sup>401</sup>

This Collaboration for Healthier Lives case studies booklet contains 51 case studies of companies that have contributed to community projects during the COVID-19 pandemic. These include 12 companies included in ATNI's COVID-19 reporting: Ajinomoto, Danone, Ferrero, FrieslandCampina, General Mills, Grupo Bimbo, Kellogg, Mars, Nestlé, PepsiCo, Coca-Cola and Unilever – and include donations (food, monetary and PPE) and supply- and value-chain support. Nutritional value of donations is not mentioned in the examples.

**World Obesity**, *COVID-19 and Obesity: The 2021 Atlas* (4 March)<sup>402</sup>

This report is a detailed account of the link between obesity and COVID-19, launched on World Obesity Day 2021. It includes country reports (for almost all countries in the world) that compare COVID-19 mortality to countries' rates of obesity, overweight and physical activity.

In countries where less than half the adult population is classified as overweight, the likelihood of death from COVID-19 is a small fraction – around one tenth – of the level seen in countries where more than half the population is classified as overweight. Of the 2.5 million COVID-19 deaths reported by the end of February 2021, 2.2 million were in countries where more than half the population is classified as overweight.

The IMF has calculated that COVID-19 will cause a total of at least \$10 trillion losses in global output over the period 2020–1, accumulating to \$22 trillion over the period 2020–5. Based on the UK experience, where an estimated 36% of COVID-19 hospitalizations have been attributed to lack of physical activity and excess body weight, up to a third of the costs – between \$6 trillion and \$7 trillion over the longer period – might be attributable to these predisposing risks.

**CGF**, *Supply-chains for Consumer Goods in the Age of COVID-19* (5 March)<sup>403</sup>

This report from Collaboration for Healthier Lives Japan summarizes the findings of the Employee Health & Nutrition Promotion Working Group, of which Nestlé is member and sub-leader. There are case studies, many of which are about Nestlé Japan. There are several examples of what companies have done/can do to promote mental health, in particular.

## April 2021

**IFPRI**, *2021 Global Food Policy Report: Transforming Food Systems after COVID-19* (13 April)<sup>404</sup>

This major report looks at the impacts of COVID-19 and the policy responses of government (particularly for vulnerable populations), and 'consider[s] what this means for transforming our food



systems to be healthy, resilient, efficient, sustainable, and inclusive'. Chapter focuses include looking at resilience in the supply chain, 'governance for nature-positive food systems', and inclusivity and equity (including the role of social protection).

There is a chapter covering regional differences in the response, and a section on 'Financing the transformation to healthy, sustainable, and equitable food systems'.

**TechnoServe**, *COVID-19 Impact Report: Rebuilding Global Livelihoods* (14 April) <sup>405</sup>

Interviewed over 1,000 people from three sectors in the food supply chain (commercial agriculture (farmers), food processing and small businesses (entrepreneurs), presenting solutions under the headings: 'Overcoming disruptions to markets', 'Overcoming disruptions to supply chains', 'Overcoming disruptions to finance' and 'A strategy for the recovery'.

Four main areas of action to be prioritized emerged: expanding access to digital infrastructure and tools; improve women's resilience to economic shocks; strengthen agricultural supply chains; and improve small business adaptability.

**WHO**, *Second Round of the National Pulse Survey on Continuity of Essential Health Services during the COVID-19 Pandemic* (22 April) <sup>406</sup>

This second survey into the continuity of essential health services (EHS) during the pandemic took place from January–March 2021.

The average percentage of countries reporting disruption to NCD services was 37% globally (45% in middle-income countries) and disruption to reproductive, newborn, child and adolescent health and nutrition services globally is 35% (with the greatest disruption in lower-middle income countries: 45%). In total, a third of countries were experiencing disruption in Q1 2021, compared to half in Q2/3 2020, and fewer countries reported complete disruption to 75–100% of services (8% compared to 24%).

The percentage of countries reporting the use of telehealth technologies to support service delivery is 64% globally, with 96% of high-income countries and 29% of low-income countries.

**WFP**, 'International Chamber of Commerce and WFP partner to mobilize the private sector in support of Zero Hunger around the globe' (23 April)<sup>407</sup>

The International Chamber of Commerce and WFP have announced a partnership 'to mobilize the private sector in support of Zero Hunger'. 'ICC will leverage its broad network for knowledge-sharing and facilitate strategic partnerships with private sector companies' and 'WFP will channel private sector expertise to build dynamic partnerships that can create systemic change together'. The partnership will also assist with collaboration between chambers of commerce worldwide and WFP regional offices to 'support future food delivery and emergency assistance operations'.

## May 2021

**Global Network Against Food Crises**, *2021: Global Report on Food Crises* (5 May)<sup>408</sup>

This annual report reveals that at least 155 million people experienced acute food insecurity at crisis or worse levels (IPC/CH Phase 3 or worse) across 55 countries/territories in 2020, an increase of around 20 million people from the previous year. This raises an ongoing trend: acute food insecurity has kept up its relentless rise since 2017, when the report was first published. first edition of the report.

Key drivers behind rising acute food insecurity in 2020 were conflict, economic shocks (replacing weather events as the second driver of acute food insecurity, often due to COVID-19) and weather extremes.



**Barilla Foundation**, *Europe and Food – Ensuring Environmental, Health and Social Benefits for the Global Transition* (5 May)<sup>409</sup>

This report is an assessment of food systems in the European Union (and the UK) in terms of nutritional challenges, agriculture, food loss and food waste. Its eight major findings are: 1) Alarming trends in nutrition 2) The potential of healthy and sustainable diets is still to be unleashed. 3) The EU faces a nutrition transition towards a Western diet. 4) At the forefront of global climate action. 5) Soil degradation is a major area of concern. 6) Agriculture lacks youth. 7) Food waste is still high. 8) Policy responses to food loss and waste are taking place at regional and national level.

The report contains a strong focus on the impact of COVID-19 and calls for a shift in food consumption towards healthier and more sustainable diets, supported by forms of agriculture that respond to and address nutritional needs.

## July 2021

**FAO, IFAD, UNICEF, WFP and WHO**, *2021 State of Food Security and Nutrition in the World: Transforming Food Systems for Food Security, Improved Nutrition and Affordable, Healthy Diets for All* (12 July)<sup>410</sup>

This annual flagship report (the SOFI report) provides an overview of the nutrition over the course of a year, detailing the impact of COVID-19 on all forms of malnutrition globally. The world had not been making progress towards SDG 2 (on ending hunger) and 'The COVID-19 pandemic was a powerful wake-up call that exposed the fleeting nature of our progress on food security and nutrition.'

It sets out six pathways to address the drivers of food insecurity, malnutrition and unaffordability of healthy diets:

- 1 'Integrating humanitarian, development and peacebuilding policies in conflict-affected areas
- 2 Scaling up climate resilience across food systems
- 3 Strengthening resilience of the most vulnerable to economic adversity
- 4 Intervening along the food supply chains to lower the cost of nutritious foods
- 5 Tackling poverty and structural inequalities, ensuring interventions are pro-poor and inclusive
- 6 Strengthening food environments and changing consumer behaviour to promote dietary patterns with positive impacts on human health and the environment.'



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