US Index 2022: How does the nutritional quality of products vary within categories?

The Access to Nutrition Initiative (ATNI) scores and ranks food and beverage companies' performance on addressing all forms of malnutrition. In October, the second edition of the US Index was released, which benchmarked 11 of the largest companies in the US. Importantly, like other ATNI Indexes, the US Index included a Product Profile - an independent analysis of the healthiness of companies 'product portfolio.

Read the full Product Profile report here.

ATNI in collaboration with The George Institute for Global Health, rates companies' portfolios using the Health Star Rating (HSR) nutrient performing model (NPM). By using an independent metric, ATNI can rely on one consistent definition of 'healthy' that multiple stakeholders can use to compare companies' portfolios. Products are rated between 0.5 stars (least 'healthy') to five stars (most 'healthy'), and any product that scores 3.5 or above is considered 'healthier.' Euromonitor International categories were used to generate subsets of products to allow nutritional analysis of comparable food and beverage products and apply category sales weightings[1]. The US Index 2022 Product Profile analyzed nutrition information for a total of 11,041 packaged food & beverage products sold by the 11 companies in the Index. These products represented an estimated retail sales value of more than USD 150bn in 2021, which accounted for almost 30% of all US food & beverage sales. Majority of the companies in the US Index 2022 have mixed product portfolios, with a few exceptions- KDP and Coca-Coca selling exclusively or majority of beverage products - and Mars deriving most of its sales from the Confectionery category. This specific report takes a closer examination at the category-level results of the US 2022 Product Profile.

1.1 Food Categories

A total of 9,057 products across 13 different food categories were analyzed for all companies combined (see Table 1). Not surprisingly, the Category with the highest average HSR was 'Processed Fruit and Vegetables' - with 341 different products assessed achieving a mean HSR of 4.0 out of 5. This was followed by the 'Soup' category with 387 products assessed achieving a mean HSR of 3.3 out of 5. The Categories 'Savoury Snacks' and 'Ready Meals' had the largest number of products assessed, 1,635 and 1,543, respectively. These two Categories had five different US Index companies active in, suggesting there is growing demand but also high opportunities to focus on offering healthier alternatives and redirecting marketing towards healthier brands. Gaps between companies' performance within a food category might indicate there is significant scope for product reformulation. For example, within the 'Savoury Snacks' category, PepsiCo (brands in this Category include Doritos, Lay's, Smartfood among others) achieved the highest average HSR of 2.7 out of 5, compared to Campbell (brands Cape Cod, Pepperidge Farm among others) and Conagra (brands include ACT II, David) - achieved an average HSR of 2.5, and followed by Kellogg (brands include Pringles, Cheez-It) with an average HSR of 1.6 and Mars (biggest brand Combos) with an average HSR 0.7.

[1] For more information about ATNI's Product Profile methodology and Euromonitor Category definitions, access The George Institute report here: X

Table 1. Comparisons of mean HSR values by food category

	Campbell	Conagra	General Mills	Kellogg	KDP	Kraft Heinz	Mars	Nestlé	PepsiCo	Unilever	Product Category mean HSR	Total no. products assessed
Baked Goods	**3.2** (133)	–	**1.2** (463)	**2.2** (124)	–	–	–	–	–	–	**1.7**	**713**
Breakfast Cereals	–	–	**2.6** (181)	**3.0** (187)	–	–	–	–	**3.2** (124)	–	**2.9**	**42**
Confectionery	–	–	–	–	–	–	**1.1** (920)	–	–	–	**1.1**	**920**
Dairy	–	**2.4** (90)	**3.9** (343)	–	–	**2.2** (98)	–	**1.1** (110)	–	–	**3.0**	**641**
Ice Cream	–	–	–	–	–	–	**1.3** (45)	–	–	**2.0** (471)	**1.9**	**516**
Processed fruit and vegetables	–	**4.0** (302)	–	–	**3.9** (39)	–	–	–	–	–	**4.0**	**341**
Processed meat, seafood, and alternatives to meat	–	**1.5** (176)	–	**4.0** (175)	–	**2.4** (162)	–	–	–	–	**2.3**	**413**
Ready Meals	–	**3.3** (541)	**2.2** (129)	–	–	**2.7** (569)	–	**3.0** (236)	–	**3.7** (141)	**3.0**	**1543**
Rice, Pasta and Noodles	–	–	–	–	–	–	**3.0** (82)	–	–	–	**3.0**	**82**
Sauces, Dressings and Condiments	**3.2** (119)	–	–	–	–	**2.0** (491)	–	–	–	**1.8** (96)	**2.2**	**706**
Savoury Snacks	**2.5** (332)	**2.5** (155)	–	**1.6** (186)	–	–	**0.7** (19)	–	**2.7** (943)	–	**2.5**	**1635**
Soup	**3.4** (372)	–	–	–	–	–	–	–	–	**2.2** (15)	**3.3**	**387**
Sweet Biscuits, Snack bars and Fruit Snacks	–	–	**2.3** (431)	**2.0** (137)	–	–	**2.9** (100)	–	–	–	**2.3**	**668**

Note: HSR= Health Star Rating. In parenthesis total number of products assessed.

1.2 Beverage Categories

A total of 1,984 beverages across eight different categories were analyzed for all 11 companies combined (see Table 2). 'Juice' was the Category with the largest number of beverage companies active in the US Product Profile (Campbell, Coca-Cola, KDP, Kraft Heinz). The largest category with respect to number of products analyzed was 'Carbonates' - with a total of 757 different beverages analyzed for Coca-Cola, KDP and PepsiCo. The 'Bottled Water – Pure' category (including still and carbonated) is assigned a maximum HSR of 5, in accordance with HSR guidance. The 'Bottled Water- Other' includes flavored and functional bottled waters. Differences among the latter category suggest companies have an opportunity to step up their sugar reduction strategies, for example, Coca-Cola achieved the highest HSR score in the 'Bottled Water- Other' category with the 55 different products analyzed (brands Dasani, Smartwater among others) had an average HSR of 3.6 out of 5. This was followed by KDP with 61 products in this category which had an average HSR of 3.2 out of 5 (brands Bai and Limitless), and Nestlé with 39 products in this category which had an average HSR of 2.5 out of 5 (brands Perrier and S. Pellegrino).

While nutrient reformulation activities might be more limited in scope for beverage manufacturers compared to packaged food manufacturers (e.g., few beverages have fats or sodium), Table 2 illustrates that existing differences in the HSRs within beverage categories can help guide major players in the US market to direct more R&D, marketing and reformulation words healthier beverages.

Table 2. Comparisons of mean HSR values by beverage category

	Campbell	Coca-Cola	KDP	Kraft Heinz	Nestlé	PepsiCo	Unilever	Product Category mean HSR	Total no. products assessed
Bottled Water - Other	–	**3.6** (55)	**3.2** (61)	–	**2.5** (39)	–	–	**3.2**	**155**
Bottled Water - Pure	–	**5.0** (9)	–	–	**5.0** (5)	–	–	**5.0**	**14**
Carbonates	–	**1.4** (139)	**1.2** (401)	–	–	**1.1** (217)	–	**1.2**	**757**
Energy Drinks	–	–	–	–	–	**2.3** (187)	–	**2.3**	**187**
Juice	**2.7** (70)	**1.9** (138)	**1.5** (171)	**1.6** (43)	–	–	–	**1.8**	**422**
Other Hot Drinks	–	–	–	–	**0.5** (8)	–	–	**0.5**	**8**
RTD Tea	–	–	**2.1** (45)	–	–	–	**2.1** (68)	**2.1**	**186**
Sports Drinks	–	**2.2** (55)	–	–	–	**2.1** (200)	–	**2.1**	**255**

Note: HSR= Health Star Rating. In parenthesis total number of products assessed. Plain packaged water (whether still or carbonated) was assigned a maximum HSR of 5.0, in consistency with HSR guidelines.