

ACCESS TO
NUTRITION
INITIATIVE

BMS Marketing Index 2024

Executive Summary

March 2024

About the Access to Nutrition Initiative

The Access to Nutrition Initiative (ATNI) is a global nonprofit established in 2013 to transform markets so they provide more nutritious, affordable, and sustainable foods for all. ATNI empowers key actors in the global food system and at national levels – especially industry and investors – to accelerate access to nutritious, affordable, and sustainable foods for all. ATNI – which is funded by governments and philanthropies – is dedicated to objectively assessing and improving the contribution made by the private sector to addressing global nutrition challenges. ATNI designs and regularly publishes various indexes and other private sector accountability tools which measure and track, over time, the extent to which companies are working to increase consumers' access to healthy foods and responsibly exercising their influence on consumer choice and behavior.

Executive summary

A person's first 1,000 days, or the period from conception until age two, are the most crucial for the development of their brain, body, metabolism, and immune system. Breastfeeding provides unparalleled brain-building benefits and gives infants the healthiest start to life. The World Health Organization (WHO) recommends exclusive breastfeeding up to six months of age, with continued breastfeeding along with appropriate complementary foods (CF) up to two years of age or beyond. Inappropriate promotion of breast-milk substitutes (BMS) remains a threat to the protection and support of breastfeeding worldwide undermining informed choice among parents and caregivers and leading to suboptimal breastfeeding practice in high-income and low-income settings alike. Improving breastfeeding practices could save the lives of nearly 420,000 children and 90,000 mothers and prevent more than 4.6 million cases of childhood obesity globally each year.¹ The 2023 Lancet series on breastfeeding estimated that USD 341.3 billion per year is lost globally from unrealized benefits to health and human development due to inadequate investment in protecting, promoting, and supporting breastfeeding.^a

For over a decade, ATNI has assessed how BMS companies comply with the 1981 International Code of Marketing of Breast-milk Substitutes ('the Code'), which provides guidelines for the responsible marketing of BMS, including CF for infants and young children. In this iteration, ATNI has expanded the coverage to include the 20 largest companies in the global baby food segment – 11 additional companies compared to the last assessment in 2021. Combined, the 20 companies hold an estimated share of at least 70% of the global baby food (BMS and CF) market. Eighteen of

these companies that sell BMS products, contributing to at least 5% of their global baby food sales, are included in this BMS Index – and, together, these companies are estimated to cover 76% of the global sales of BMS products. This BMS Marketing Index 2024 assesses the quality of companies' BMS marketing policies and management systems, their level of transparency, and their marketing practices in five global markets - China, Germany, Indonesia, Viet Nam, and the US. For this research ATNI assessed compliance with the International Code of Marketing of Breast-milk Substitutes, relevant subsequent WHA resolutions and WHO Guidance on Ending the Inappropriate Promotion of Foods for Infants and Young Children. ATNI did not assess compliance with local regulations or laws.

Since 2021, some improvements were measured related to updated policies and enhanced practices.

However, not one of the 18 companies assessed fully align with the Code. In addition, digital platforms have now emerged as the major driver for BMS marketing representing 61% of the incidences of non-compliance.

Not one of the 18 companies assessed in the BMS Index 2024 scores 100% compliance with the Code for their policies and practices. The highest total score is 37% for *FrieslandCampina* followed by four companies between 20% and 33% (*Danone*, *Hain Celestial*, *H&H*, and *Nestlé*). Three companies scored between 13% and 18% (*A2 Milk*, *HiPP*, and *Morinaga Milk*), two companies scored below 10% (*Abbott and Reckitt*), and eight companies (*Beingmate*, *Feihe*, *Hero*, *Junlebao*, *Lactalis*, *Mead Johnson China*, *Vinamilk*, and *Yili*) scored 0%.

^a The 2023 Lancet Series on Breastfeeding, available at: <https://www.thelancet.com/infographics-do/2023-lancet-series-breastfeeding>.

A total of 1,614 incidences of inappropriate marketing of formula/non-compliance with the Code were identified across all companies in the five markets assessed. Of these, 61% occurred in online media and online retailers/points-of-sale (980 out of 1,614), while around 9% were observed on traditional media, mostly TV (138 out of 1,614). Approximately 31% of the incidences of non-compliance were identified on product labels (496 out of 1,614).

A total of 290 incidences of non-compliance with the Code concerned BMS products sold by *Danone*, 219 incidences concerned *Nestlé* BMS products, and, in descending order, 142 incidences were observed for *Abbott*, 135 for *Reckitt*, 120 for *Morinaga Milk*, 105 for *FrieslandCampina*, 104 for *Feihe* (all in China), 102 for *Mead Johnson China* (all in China), 87 for *Junlebao* (all in China), 81 for *Yili* (all in China), 65 for *HiPP*, 63 for *H&H* (all in China), 44 for *Vinamilk* (all in Viet Nam), 38 for *Beingmate* (all in China), 14 for *A2 Milk* (all in China), and five for *Hain Celestial* (in the US).

Nearly all product labels assessed (98%) were found to contain one or more incidences of non-compliance with the Code, like the inclusion of claims and the absence of a statement on the importance of exclusive breastfeeding in the first six months of life and continued breastfeeding for up to two years or beyond. Most observed incidences of non-compliance concerned growing-up milks (GUM, 893 out of 1,614). This suggests positive effects of more stringent regulations limiting the advertising and promotion of infant formula (IF) and follow-up formula (FUF) through traditional and online media channels.

The Corporate Profile assessment of company policies and management systems showed eight out of 18 companies had a BMS marketing policy. *Abbott*, *Danone*, *Feihe*, *FrieslandCampina*, *Nestlé*, *Reckitt*, and *Yili* were previously assessed in the BMS/CF Index 2021, and it was noted that

¹ "The Cost of Not Breastfeeding," <https://www.aliveandthrive.org/en/the-cost-of-not-breastfeeding> (Accessed: 9 February 9 2024)

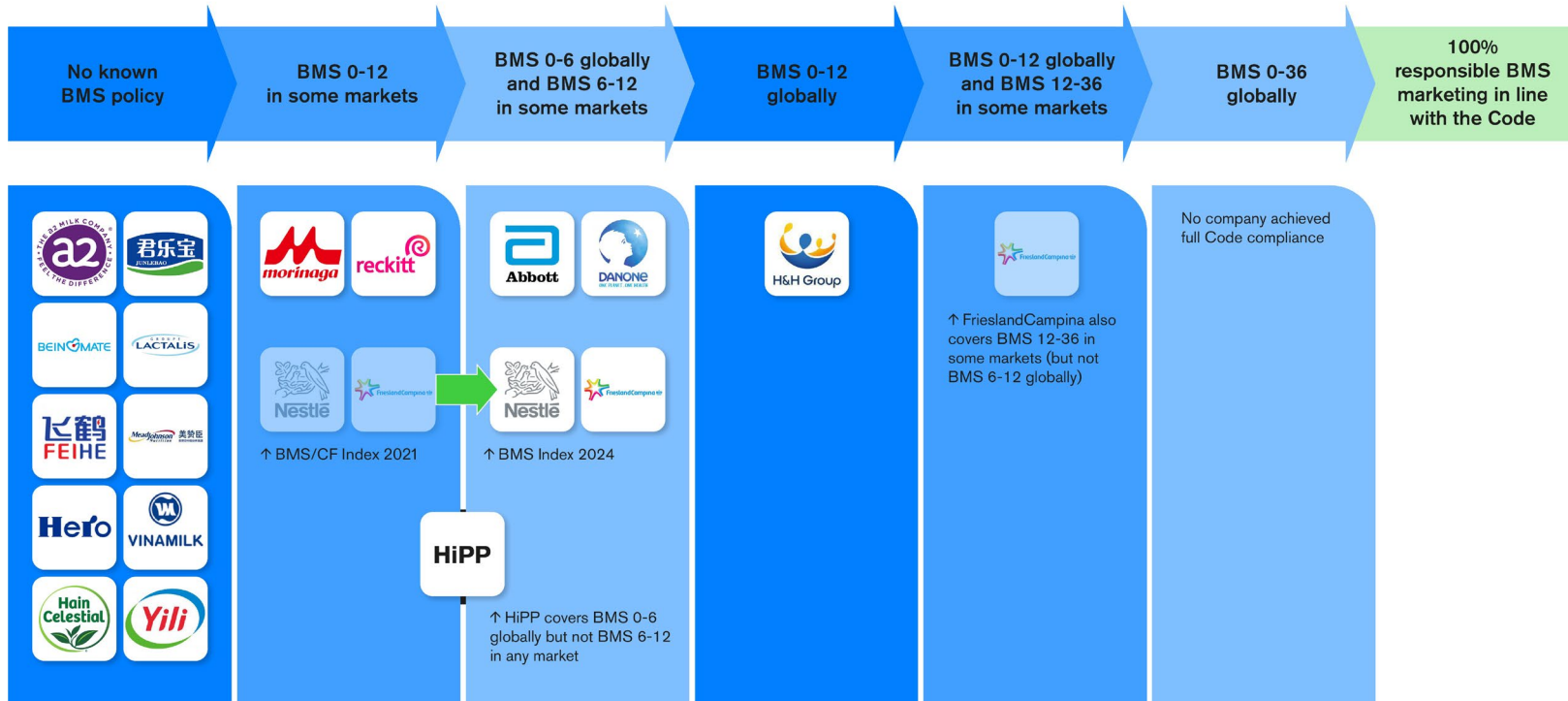
Abbott, *FrieslandCampina*, and *Nestlé* have revised their policies since 2021.

FrieslandCampina and *Nestlé* have improved the scope and application of their BMS marketing policies, taking closer steps towards achieving full Code compliance. Compared to the BMS/CF Index 2021 assessment, *FrieslandCampina* has improved the application of its BMS marketing policy to cover IF in all markets without exception. The company now upholds its commitments to the marketing of formula for children aged 6-36 months in countries where these products are covered by local regulations that are less strict than the company's global commitments. *Nestlé* has expanded the scope of its BMS marketing policy to cover IF for infants aged 0-6 months (but excluding formulas for special medical purposes) in all markets without exception and continues to cover FUF for older infants aged 6-12 months only in some markets.

FrieslandCampina shows the highest Corporate Profile score for policies and management systems (64%) – reflecting the commitments around the different provisions of the Code, and the extent to which commitments are upheld for different product categories and across the geographies/markets it operates in – followed by *H&H* (41%) and *Danone* (39%).

These results show the urgency with which companies, investors, policy makers, and civil society organizations must double down efforts to achieve optimal infant and young child nutrition goals and ensure compliance with the Code and relevant national legal measures. These goals include those set by WHO for 2025 to achieve higher levels of exclusive breastfeeding globally and combat growing levels of overweight and obesity and reduce deaths and illness from diet-related chronic disease

Status of companies' policies towards Code compliance in 2024



Note: each step shows the age range the product is intended to e.g BMS 0-12, BMS intended for infants and young children 0-12 months