



ACCESS TO
NUTRITION
INITIATIVE

CF 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 does this by designing and regularly publishing various indexes and other private sector accountability tools. These indexes and tools 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

Complementary foods (CF, see box below) should provide sufficient energy, micronutrients, and protein to cover a child’s nutrient and energy needs, together with breastmilk. Commercially produced food products that are promoted as appropriate for children between six months and three years of age – including instant cereals, porridges, puréed foods, food in pouches, snacks and ready-to-eat or instant meals – are known as “commercially produced complementary foods.” Over the last decade, there has been substantial global growth in the commercial CF market¹. Global retail sales

of CF products were estimated to amount to almost USD 18 billion in 2021. Continued growth is expected, reaching a total market value of over USD 26 billion by 2028.^{2,3}

This CF Marketing Index 2024 is the first standalone Access to Nutrition Index on companies that produce and distribute CF. It builds on a decade-plus of ATNI experience assessing compliance of companies that sell baby foods with the 1981 International Code of Marketing of Breast-milk Substitutes (‘the Code’). The Code provides guidelines for the responsible marketing of breast-milk substitutes (BMS), including commercial CF for infants and young children. The NetCode protocol/toolkit and the World Health Organization (WHO) Guidance on Ending the Inappropriate Promotion of Foods for Infants and Young Children were used as reference for this research.

The CF Marketing Index 2024 assesses ten of the largest companies that sell CF products, and for which CF amount to at least 5% of their estimated global baby food sales. Together, these companies are estimated to account for 49% of the global sales of commercial CF products. This Index has two components weighing in equally to a total CF score: a Corporate Profile assessment of the quality of companies’ CF marketing policies, management systems and their level of transparency; and a Country Study

March 2024

assessment of 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.

Social listening tools were used to monitor companies’ online marketing activities to determine their level of compliance with the Code and WHA Resolution 69.9, identifying paid advertisements and promotions for CF products across websites, social media, and retail platforms. Traditional media were monitored to evaluate advertisements on broadcast media (TV and radio) and print. Product labels were reviewed based on images obtained from a third-party database and, in some cases, pictures provided by companies. The assessment period for each method varied, with social listening spanning eight weeks, traditional media monitoring up to six months, and the product label review targeting products launched between March 2020 and February 2023.

ATNI also conducted related research in 2023, applying the WHO Nutrition Promotion and Profiling Model to assess labelling practices as well as the nutritional quality of CF in ten markets around the world. The results of this work can be found [here](#).

None of the companies was found to be fully compliant with the Code and guidance on appropriate promotion of foods for infants and young children in policies and practice. The highest total CF score is 25% for *Hain Celestial*. *Danone* scored 23%, *Nestlé* 20%, and *Beingmate*, *Lactalis* and *Vinamilk* each scored 17%, while *HiPP* scored 11%. Three companies (*Hero*, *Kraft Heinz* and *Progress*) each scored 0%.

For the Corporate Profile assessment none of the companies had a specific CF marketing policy covering CF products intended for infants 6-36 months. The companies’ scores across nine topics ranged from 0% to 21%. None of the companies showed commitments on ‘marketing messages’

(0%), and 'avoidance of cross-promotion' (0%), whereas on 'guiding principles for Infant and Young Child Feeding' (21%), 'implementation and monitoring' (14%), and 'lobbying and influencing' (14%) companies showed more commitments. *Danone*, *HiPP*, *Nestlé* and *Kraft Heinz* showed more commitments across the nine topics compared to the other companies. All companies obtained a geographic 'penalty' of 90% because no information was found or presented on if and how commitments are upheld in companies' markets around the world. The average corporate profile score was 3.5%, dropping to 0.4% after the geographic penalty was applied. *Danone* had the highest score (1%) followed by *Nestlé* (0.8%), *HiPP* (0.7%) and *Kraft Heinz* (0.5%). The other companies had scores less than 0.2%.

Marketing practices were assessed for nine out of the ten [90]. The combined overall score for marketing practices in the five specific markets shows an average score of 30% across all companies, marketing channels and labels assessed. This indicates substantial room for improvement in adherence to the Code [90] and the WHO guidance on ending inappropriate promotion of foods.

None of the companies assessed achieved complete compliance with the Code in any of the countries included in this study. *Hero* and *Kraft Heinz* scored 0% on average, indicating more than 20 observations of non-compliance. *HiPP*, *Lactalis*, *Beingmate* and *Vinamilk* scored between 22% (*HiPP*) and 33% (the other three). *Hain Celestial*, *Danone* and *Nestlé* obtained average scores of 50%, 44% and 40%, respectively, indicating less than 20 observations of non-compliance.

A total of 449 incidences of inappropriate baby food marketing not compliant with the Code and WHO guidance were identified across all companies in the five markets they were assessed in. These incidences were almost evenly distributed across product labels (239) and online channels (205), while only five occurrences were found in traditional media. A total of 155 incidences of non-compliance with the Code concerned CF products sold by *Nestlé*, and in descending order 90 incidences were observed for *HiPP*, 65 for *Kraft Heinz*, 52 for *Hero*, 39 for *Danone*, 14

incidences for *Hain Celestial*, 12 for *Beingmate* (all in China), 11 for *Lactalis*, and 11 for *Vinamilk* (all in Viet Nam).

The CF Marketing Index 2024 reveals that companies, investors, policymakers, and civil society organizations must double down on their efforts towards optimal infant and young child nutrition and to achieve nutrition goals. These include goals set by the WHO for 2025 to achieve higher levels of exclusive breastfeeding globally, combat growing levels of overweight and obesity and reduce deaths and illness from diet-related chronic diseases. Compliance with the Code and adherence to WHO guidance on ending inappropriate promotion of foods for infants and young children, and following national legal measures is critical in order to achieve these goals.

Companies assessed in the CF Index



Excerpt from the 2023 World Health Organization (WHO) Guideline for complementary feeding of infants and young children 6–23 months of age

“Complementary feeding, defined as the process of providing foods in addition to milk when breast milk or milk formula alone are no longer adequate to meet nutritional requirements, generally starts at age 6 months and continues until 23 months of age. This is a developmental period when it is critical for children to learn to accept healthy foods and beverages and establish long-term dietary patterns. It also coincides with the peak period for risk of growth faltering and nutrient deficiencies. The World Health Assembly endorsed a comprehensive implementation plan for maternal, infant and young child nutrition, which includes three targets for 2025 that directly relate to appropriate complementary feeding, essential to fostering healthy growth: 1) 40% reduction in the number of under-5s who are stunted; 2) reduce and maintain childhood wasting to less than 5%; and 3) no increase in childhood overweight. Appropriate complementary feeding is also fundamental to achieving several of the targets in the second Sustainable Development Goal to achieve zero hunger by 2030.”