

EXECUTIVE SUMMARY

PURPOSE AND SCOPE

The fifth edition of the Global Access to Nutrition Index assesses 30 of the world's largest food and beverage (F&B) manufacturers – representing 23% of the global F&B market – on their performance to improve access to nutritious foods. The index presents the current state of play, companies' relative progress across a range of nutrition-related topics, identifies areas for improvement, and offers a roadmap for change.

Using tools such as this index, ATNi challenges the food industry, investors, and policymakers to shape healthier food systems. Our goal is to translate data into actionable insights that will drive partnerships, innovation, and market change, ensuring more people have access to nutritious and sustainable food.

This edition includes a significantly revised methodology with increased attention to product offerings in low- and middle-income countries (LMICs). The index has also sharpened its nutrition focus, assessing companies across a set of 51 priority indicators in eight weighted categories: Product profile (30%), Responsible marketing (15%), Nutrition governance (15%), Affordable nutrition (15%), Portfolio improvement (10%), Nutrient profiling models (NPMs) for reporting purposes (5%), Workforce nutrition (5%), and Responsible labelling (5%). A detailed methodology section is included in the report detailing the changes as well as the Index's limitations.

GLOBAL NUTRITION TRENDS

Over the past two decades, obesity rates have surged, progress on addressing global undernutrition has slowed, and micronutrient deficiencies continue to affect close to half of children and two-thirds of women of reproductive age. Adult underweight prevalence halved between 2000 and 2022, but progress has slowed since. Meanwhile, obesity rates doubled from 7.9% to 15.9% during this period – with projections estimating that obesity rates will reach 20.3% by 2030. In 2022, 43% of adults (2.5 billion) globally were classified as overweight, with a particularly rapid increase in LMICs.

Poor dietary intake and obesity are risk factors for non-communicable diseases (NCDs) – such as diabetes, hypertension, and heart disease – with the vast majority of deaths from NCDs (77%) occurring in LMICs.

The cost of malnutrition is staggering, and the economic toll is expected to exceed \$41 trillion over the next decade – with undernutrition costing \$21 trillion and overweight/obesity \$20 trillion. The cost of overweight and obesity is anticipated to account for an average of 3.3% of gross domestic product (GDP) globally by 2060, with lower income countries facing the greatest economic impacts.

DIETARY SHIFTS AND PROCESSED FOODS

The shift toward greater processed food consumption is a major contributor to obesity and diet-related NCDs. While processed food sales are highest in high-income countries (HICs), consumption is growing most rapidly in LMICs. Socioeconomic changes, such as urbanisation and more women working outside the home, contribute to this shift. However, the expansion of multinational F&B companies into these regions – who extensively market often inexpensive, low-nutrient packaged foods – is a recognised driver of these trends.

Further, healthy diets remain unaffordable for many – 52% of households in LMICs, for example. Without transformative changes to food systems, it will be challenging to achieve the Sustainable Development Goal (SDG) 2 of ending all forms of malnutrition by 2030.

RESEARCH METHODOLOGY AND LIMITATIONS

The Global Index methodology recognises the current state of knowledge across nutrition topics remaining flexible and evolving. This means indicators may be removed, added and changed over the different iterations. A direct like-for-like assessment is not always possible between Indexes. In addition, the Global

Index is an in-depth examination of the policies and practices of F&B manufacturers related to nutrition. It does not assess other corporate issues of policy and practices of food and beverage manufacturers, including 1) environmental sustainability, for which we partner with the World Benchmarking Alliance and summarise their findings where possible; 2) corporate tax abuse; 3) corporate wealth and income distribution; and 4) country-specific food lobbying practices. In future, and depending on available resources, ATNi will include elements of each of these topics in these indexes.

KEY FINDINGS

Although F&B manufacturers are increasingly recognising their role in shaping consumers' diets, bolder actions are needed from industry, policymakers, and investors to shift the needle towards increased production of healthier foods and the promotion of healthier diets.

That said, there has been important progress in several areas. First, 30% of companies now use internationally recognised NPMs to assess and classify products as 'healthier' for reporting and target-setting. Second, 37% of companies (11/30) have set age thresholds for product marketing and market more responsibly to children. Third, 30% of companies (9/30) now have some form of an affordable nutrition strategy. Finally, there has been a small improvement since 2021 in the overall healthiness of product portfolios with 34% of sales now derived from healthier products.

However, the index reveals that all companies must make improvements to fully address nutrition challenges, with company performance on access to nutrition varying widely (see Figure 1). While approximately 34% of their total sales are derived from 'healthier' products, this figure remains below the 2030 target of 50%. The key findings are outlined below, with detailed results available in the full report, company scorecards, and an interactive dashboard.

Company Name	Product Profile (30%)	Responsible Marketing (15%)	Nutrition Governance (15%)	Affordable Nutrition (15%)	Portfolio Improvement (10%)	Reporting NPMs (5%)	Workforce Nutrition (5%)	Responsible Labelling (5%)	Combined BMS/CF adjustment	Overall Score (100%)
Danone	7.3	7.1	9.6	5.2	9.5	9.5	8.7	7.7	-1.3	6.4
FrieslandCampina	6.8	4.4	8.0	5.1	6.6	8.8	2.6	7.3	-0.6	5.6
Arla Foods	6.1	6.1	5.4	5.1	4.1	4.3	2.4	7.9		5.5
Grupo Bimbo	5.0	3.5	6.9	6.8	5.0	8.6	2.9	4.6		5.4
Unilever	3.1	6.5	7.6	3.3	6.3	7.0	7.4	6.7		5.2
PepsiCo	3.5	3.4	7.3	3.5	6.3	2.9	6.5	5.6		4.5
Campbell's	5.3	2.9	5.9	3.4	1.9	3.1	0.7			4.1
Kellanova	3.3	3.6	5.1	1.9	4.3	8.0	2.5	5.5		3.8
Nestlé	4.0	4.1	7.8	3.0	3.5	9.0	7.0	7.5	-1.3	3.7
Yili Group	7.5	0.6	5.4		6.9		2.9		-1.0	3.3
Meiji	6.1	2.4	4.6		1.5	0.2	0.8	4.2		3.3
Coca-Cola	4.0	5.5	3.4		2.8		2.9	5.9		3.3
Flora FG ^	4.4	3.2	2.7		6.1		2.3	6.0		3.2
General Mills	3.9	3.8	5.7		2.5	3.8	1.1	2.3		3.2
Mars	2.1	7.3	2.4		4.2	0.8	4.7	5.3		3.1
Kraft Heinz	4.0	2.8	6.1		4.6	5.0	1.7	3.9	-0.5	3.0
Nissin ^	3.8	2.1	3.8	2.8	2.8	0.3	1.4	4.1		3.0
Mengniu	6.7		3.6		1.1		0.4			2.9
Barilla ^	6.6	0.5	2.2		3.0		1.2	2.8		2.9
Mondelez	2.0	4.9	5.1		4.5		1.1	3.3		2.8
Conagra	5.4	1.8	3.7		1.3		0.4			2.6
Suntory *	3.2	2.1	2.3		3.1		0.8	2.0		2.1
Keurig Dr Pepper	2.9	1.6	3.7		1.7	2.8	0.3			2.0
Ajinomoto	2.3	1.4	3.7	0.3	0.8	0.2	2.9	2.7		1.9
Hormel **	4.9		1.4		0.2		0.6			1.7
Indofood ^	2.4		1.8		0.7	4.5	2.4	2.5		1.5
Ferrero Group	1.2	3.2	0.8		1.3		2.2	2.5		1.3
Lotte **	2.1		2.3		1.4	0.2	0.4			1.1
Hershey **	1.3	3.0	1.4							1.1
Lactalis *	6.3	1.0	0.6					0.6	-1.5	0.7

* Did not provide information to ATNi.
 ^ Not assessed in 2021.
 Combined BMS/CF adjustment: Adjustment applied to companies assessed in the BMS/CF Marketing Index 2024. Scores are adjusted with a maximum deduction of -1.5 point for not fully complying with the WHO Code.

• A company scores 0 when insufficient information or evidence is found on its policies and practices across the nutrition topics assessed in this index. This has been left blank.
 • Non-applicable: categories has been greyed out

Figure 1 Overall scores

Product Healthiness

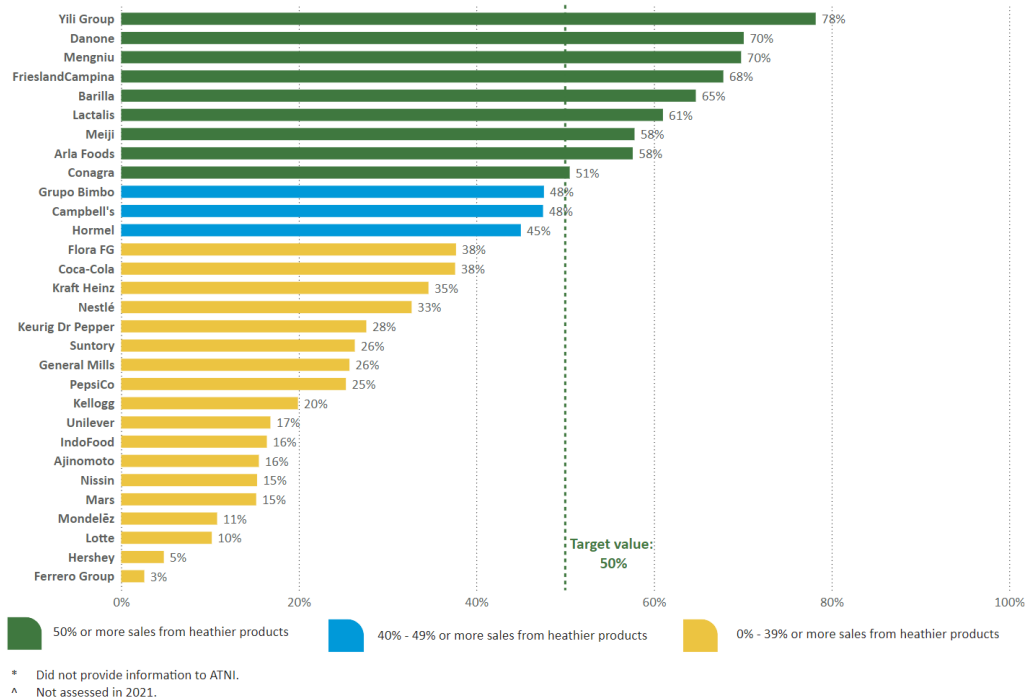


Figure 2 Product Healthiness

Companies derive 34% of their sales from products classified as 'healthier'. Among the 52,414 products analysed using the Health Star Rating (HSR) system, 31% – a total of 16,467 products – met the healthier threshold (3.5 stars and above out of 5), representing an estimated 34% of the companies' combined sales in 2022. However, only 30% of the companies have achieved at least 50% of sales from 'healthier' products.

Portfolio healthiness was found to be lowest in LMICs, highlighting disparities in product offering across different markets. Overall food product healthiness in LMICs scored much lower (HSR 1.8) than in HICs (HSR 2.3). At the aggregate level, the share of 'less healthy' products marketed by the F&B industry (30 assessed companies) is higher in LMICs than in HICs.

In LMICs, micronutrient data were available for a smaller proportion of products compared to in HICs (data on one or more micronutrients were identified for 36-37% of products in LMICs versus 52% in HICs). The research found fortification information for a total of 12,019 products, of which 28% were fortified with one or more micronutrients. Of these fortified products, 36% did not meet the healthy threshold, as assessed by an HSR rating of 3.5 stars or above.

Companies' healthier sales targets have considerable scope for improvement. Just one company has set a target to increase its proportion of healthier product sales using an internationally recognised NPM. Another 30% have healthier sales targets, but these are either not as a proportion of their overall portfolio sales (four companies) or use the companies' own definitions of 'healthier' (eight companies).

Reporting on Product Healthiness

Reporting on portfolio healthiness using international models is gaining traction among F&B manufacturers. Of the companies assessed, 30% have taken the important step of using an internationally recognised NPM to annually report on portfolio healthiness, with six companies doing so as percentages of global sales. While the quality, coverage, and transparency of reporting varies significantly, this shift reflects a growing appetite for reporting against international NPMs among leading F&B manufacturers.

Marketing to Children

No company fully prohibits marketing unhealthy foods to children under 18 across all marketing channels and techniques. Five companies have taken positive steps: two now only market products defined as 'healthier' according to a government-endorsed

model (in addition to five not marketing any products), and four have raised their marketing age thresholds to 16 (in addition to one already at 18). However, none have comprehensive policies that align with all World Health Organization (WHO) recommendations regarding product restrictions, age thresholds, and comprehensiveness of scope. No company has adopted a WHO Regional NPM, developed specifically to protect children from unhealthy food marketing.

Industry pledges are driving incremental progress for the majority of companies, but there is still a long way to go. As part of three key industry marketing pledges (from the International Food & Beverage Alliance (IFBA), the Children's Food & Beverage Advertising Initiative (CFBAI), and the European Union (EU) Pledge), 56% of companies have raised their age thresholds from 12 to 13 years and strengthened their audience thresholds for defining 'child-directed' media. However, these commitments still fall short of WHO standards on product restrictions, age thresholds, and scope.

Affordable Nutrition

Only 30% of companies have demonstrated a strategy to price some of their 'healthier' products affordably for lower income consumers, and quality and scope vary. While 30% have strategies to make part of their 'healthier' portfolio more affordable, mainly in LMICs, only two use internationally recognised models to define 'healthier' for this purpose. Most strategies apply to a limited range of products and markets, with significant gaps in evidence supporting their implementation.

A lack of standardised guidance and metrics hinders progress on affordable nutrition. Without internationally recognised best practices or standard definitions and metrics regarding F&B manufacturers' role in delivering 'affordable nutrition', progress will likely remain limited. Companies' approaches to this issue are therefore mostly exploratory, which also reduces their motivation to report comprehensively on their efforts.

CONCLUSION

One in five deaths globally is linked to poor diet, highlighting the urgent need for greater corporate accountability and improved private sector performance as the hidden costs of our food system continue to mount.

Food and beverage manufacturers have significant influence over consumers' diets and the global food environment. The 2024 Global Index shows that F&B companies need to do more to embed nutrition into their core business, make product offerings healthier, and market them more responsibly – so that, by 2030, they are on track to ensure at least 50% of portfolio sales come from healthier products.

Policymakers and governments should introduce mandatory policies. To date, voluntary efforts by companies have been insufficient to ensure widespread and strong nutrition-related performance. Mandatory policies will help achieve this, especially in areas where voluntary efforts have been shown not to work. Policies should be implemented around mandatory front-of-pack labelling, making products high in fat, sugar, or salt more expensive, making healthier foods more affordable, and marketing restrictions – all of which have been shown to be effective in shaping healthier food environments. Better regulation will also create a more level playing field for industry actors.

Responsible investors already see the negative economic impacts of malnutrition and recognise that nutrition is a material issue for businesses and long-term profitability. All investors should actively demand the use of standardised nutritional metrics, such as an internationally recognised NPM, for reporting purposes, and make investment decisions based on overall portfolio healthiness and relative sales of healthier products. Embedding nutrition into environment, social, and governance or sustainability reporting is a promising way to ensure companies report on the impact of their practices and portfolios on human health.

As regulation intensifies and consumers and investors call for improved accountability, companies with healthier product portfolios will be better positioned for long-term success, while those failing to adapt face material risk. The food industry stands at a pivotal crossroads.

Embracing nutrition is no longer an option, but essential for business and for public health.

Notes and References

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